

CASE MANAGER CHECKLIST

Beginning of School Year:

- Send letter of introduction to family (attachment one)
- Follow up with phone call 1 week later, offer to meet at open house for in person introductions, set up system of ongoing communication: ie. email, planned phone contact or in person meetings.
 - Open house? Yes No
 - Plan for ongoing contact: _____

Ongoing:

- Document contacts (print emails, mark calendar for phone/in person meetings)
- Offer district opportunities for increased parent involvement opportunities

Prior to ANNUAL PPT:

1 month prior:

- Call to set up convenient time for meeting, ask if they would like an informal meeting prior to PPT to go over any concerns.
 - PPT set for: _____
 - Informal Pre-PPT meeting set for: _____
- Send required invitation with district enclosure (attachments two and three)

1 week prior

- Mail draft IEP goals, reports and any new evaluation results to family
- Hold informal meeting if wanted

By the day of the meeting:

- Prepare folder for family to keep information with date of meeting, include procedural safeguard notice
- IF child:
IS NEW TO DISTRICT or NEWLY IDENTIFIED: Prepare resource packet (content list attached/attachment four)
- IF NOT – make sure they have list of Helpful Resources Brochure (attachment five) and district contact information (magnet)

After the meeting:

- Send final IEP within 5 days
- Include parent feedback postcard (attachment six)

Student: _____

Interim PPT

- Call to schedule, discuss concerns if possible
- Send invitation with district enclosure (attachments two and three)
- Attend meeting and follow up with revised IEP and parent feedback card (attachment six)