
# Case Manager End of Year Checklist

## Case Manager: School: Check-Out Date:\_\_\_\_\_\_\_\_\_\_\_\_\_

The following checklist needs to be completed to ensure the on-time completion of tasks and submission of required documents. The Case Manager End of Year Checklist will be submitted to the IST at checkout **by date determined by IST** and no later than May 8. Each box needs to be checked off after completion and Case Manager will initial *each* line.

 By **February 26,** ensure ALL Annual Reviews are held. These Annual Reviews need to be locked by **March 2**.

By **May 7*, all*** events for SY20-SY21 are to be finalized Annual Reviews and/or Amendments

 FBAs

 MDRs

 ESY

\_\_\_\_Progress Reports

 By **May 7**, ensure ALL progress reports are complete and locked (copies are sent home to parent by May 22). ***\*Any events occurring after Case Manager checkout with IST must be verified by IST.***

 Create an end-of-year progress report

 Analyze each student’s data and include a 1-2 sentence summary of your analysis on the IEP progress report.

 After data analysis, make a recommendation of where staff should begin next year on that objective based on where student is now (1-2 sentences) on the Progress Report.

 Have your IST check Progress Report ***BEFORE*** it is locked.

 By **May 7**, ensure all SEC student records have the following events locked in SEC Campus:

 All Events conducted this year with applicable Parent Invitations

 Eligibility Report if during SY2020-21

 Psychological Report if during SY2020-21

 MDR if during SY2020-21

 FBA if during SY2020-21

 By **May 7**, ensure that all data binders are updated and organized to include analyzed data and progress report. Give to IST by \_\_\_\_(date provided by IST).

 By **May 8,** enter Preschool Exit Data, if applicable.

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 By **May 7**, ensure ALL **signature pages** for ALL events are uploaded into SEC Campus:

 Notices of Meetings

 Reevaluation Determination Review Form (if applicable)

 Meeting Participation

 Consent to Evaluate

 Parent Consent for Excusal from IEP Meeting (if applicable)

 Eligibility Report

 Authorization to Release Confidential Information (if applicable)

 By **May 7,** ensure SIPA for each student reflects IEP services for upcoming school year.

 By **May 7**, ensure there is a completed Request for Special Transportation Form for each student who will receive Special Education Transportation. **\*Must be verified by IST & include student medical forms if applicable.** These should be completed at Annual Review Meetings.

 By **May 7**, complete AT Current Use Form for each student that AT supports/has device and give form to IST. Please make sure there is a charger with each device. Make sure all students have access to their devices (e.g., high-incidence students with laptops) through the end of the instructional school year because students will need their laptops per the IEP.

 By **May 7**, complete AT Home Use Agreement and obtain parent signature for any device going home for summer use. Submit the Home Use Agreements to IST.

 By \_\_\_\_\_(**date determined by IST)**, provide all finalized ESY Materials for Site and Tutorial ESY students to the IST, if applicable.

 By **May 7**, IST will review all submitted ESY materials.

 \_\_\_ By **May 10**, all annual reviews from August- October 1, 2021, should be finalized.

 No later than **May 7,** or earlier date if determined by IST, meet with IST and submit completed checklist.

 By **May 10**, all annual reviews from August- October 1, 2021, should be finalized.

\_\_\_\_ By **May 26,** Spring administration of Unique Learning Benchmark complete for students on adapted curriculum.

Case Manager Signature:

IST Signature:

Date:

Date:

## \*Any events occurring after your checkout with IST must be verified by your IST.