**Definition of Case Management**- Case management is a designated person who has primary responsibility for the IEP process for the student including organizing and chairing IEP team meetings, providing notice to parents and team members, and maintaining documentation for IEP progress reports. The case manager leads a process that assesses, plans, implements, coordinates, monitors, and evaluates the options and services required to meet a students needs. It is characterized by advocacy, communication, and resource management and promotes quality interventions, educational supports and student outcomes. Case managers in the San Luis Valley are our special education teachers.

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| Role/ Responsibility | Case  Manager | School Psychologist | Other Service Provider | Comments |
| **Referral** |  |  |  |  |
| RtI Lead gives referral to Case Manager; Case Manager gives referral to School Psych. | X | X |  | School Psych provides referral/information to appropriate personnel aligned with needs (i.e. copy of referral to SLP if there are speech and language concerns, etc.) |
| School Psych add referral documents to Enrich |  | X |  | School psych will upload referral information to Enrich. |
| ***Parent Signature Pages & Parental Rights*** |  |  |  |  |
| Generate the **Consent for Evaluation** for Initials |  | X |  | Psychs are involved from the beginning for referrals for consideration for Sp Ed. |
| Generate the **Consent for Evaluation** for initials, triennials and special evaluations |  | X |  | All service providers should collaborate to determine the assessment plan. |
| Get parent signature on **Consent for Evaluation** and provide Parental Rights. | X |  |  | Case manager and school psych will work together to document three attempts to receive consent. Consents need date of outcome and to be uploaded immediately. |
| Complete the **Determination of Eligibility** form |  | X |  | This is completed and agreed upon at the Eligibility Meeting. |
| Role/ Responsibility | Case  Manager | School Psychologist | Other Service Provider | Comments |
| **PN and Consent for Sp Ed and Related Services** form at Initial Eligibility Meeting |  | X |  | If parent is not present at the Initial Eligibility Meeting, the meeting will be rescheduled. |
| **PN and Consent for Sp Ed and Related Services** for students moving into the District |  | X |  | Psych will generate. The case manager will get parent signature. |
| IEP Amend Form | X |  |  | Case manager will get parent signature. |
| Upload **all** signature pages | X |  |  | Case manager is responsible for uploading all signature pages. |
| Provide Parent Rights/Procedural Safeguards | X | X |  | Parental rights need to be provided at all Eligibility and IEP Meetings. It also needs to be provided when parents request it, when a complaint is filed, when a student is being referred for an initial evaluation to determine eligibility or a consent form is request for evaluation.. |
| ***Evaluation Report*** |  |  |  |  |
| Record Review | X | X | X | Collaborative multi-disciplinary approach to gathering information on students. |
| Interpretation of state and district assessment results. | X | X |  | Includes assessments such as TCAP, WIDA, ACCESS, Co-Alt, PARCC, DIBELS Next, CFA (common formative assessments), NWEA, STAR, etc. |

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| Role/ Responsibility | Case  Manager | School Psychologist | Other Service Provider | Comments |
| Summary of interventions leading to referral and possible identification (RtI and other data). | X |  |  | Document intervention progression, including the data on how the student responded to the interventions. |
| Evaluation Report (multi-disciplinary report) | X | X | X | The person who administered the assessment will summarize and interpret it in the report. |
| ELL data & interventions | X | X | ELL Teacher  SLP | ELL teacher can provide write-up to the psych. The evaluation report should include language disability vs. language differences. |
| Development/Social History |  | X |  | When applicable/as determined to be necessary. |
| Health Summary | X |  | School Nurse | School Nurse (all Initials & triennials). Case mangers are to notify the school nurse of any annuals coming on students with health concerns. |
| Eligibility Summary Statement |  | X |  |  |
| Facilitate Eligibility Determination Review |  | X |  |  |
| Upload SWAAAC Eval |  |  | SWAAAAC team members | Upload SWAAAC Eval |

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| Role/ Responsibility | Case  Manager | School Psychologist | Other Service Provider | Comments |
| ***IEP*** |  |  |  |  |
| Notice of Meeting | X |  |  | Documented three attempts to contact parents. Notify all service providers. |
| Facilitate all IEP Meetings | X |  |  | Psychs are required to attend only Initial, Triennial/Reevaluation IEP Meetings, and Manifestations. |
| Open a new IEP | X |  |  |  |
| Review IEP for compliance before finalizing. Use finalize to check your work. | X |  |  | Records specialist will spot-check IEP for compliance and administratively approve ALL IEP’s (annuals, tri’s, amendments, special requests) |
| Notify BOCES record specialists the IEP is ready to be administratively approved. | AR’s and Tri’s IEP Meetings, Special Requests | Eligibility Determination pages and Evaluation report |  | Case managers will email records specialist when the IEP is ready to be administratively approved. |
| IEP Amendment | X |  |  | Notify records on all IEP amendments when complete. |
| Notify team members and BOCES record specialist when IEP amendment is complete. | X |  |  | Case managers will email team of changes and records specialist when the IEP Amendment is ready to be administratively approved. |
| Completed IEP, evaluation report and eligibility determination provided to parents | X |  |  | Make sure if there is an evaluation report or eligibility determination page that it is also sent to parent along with IEP. |
| Role/ Responsibility | Case  Manager | School Psychologist | Other Service Provider | Comments |
| Progress Monitoring | X |  | X | Each provider determines frequency. Check dashboard to see due dates |
| Progress Report | X |  |  | Check with all services and ensure up to date. Complete for annual review. |
| Change of Status Form | X |  |  | Upload Change of Status upon disenrollment of student/no show/etc. Notify Records Specialist immediately of student change. |

Notice of Meeting Guidance:

Invite school personnel who will be in attendance. Plan the invitation. If school resource officer or other school personnel will be attending, they MUST be on the notice of meeting. It is not fair to parents to invite someone at the last minute.

If you are inviting an outside agency, obtain and document parent permission to invite someone from another agency. Utilize the form in Enrich to show that parent permission was obtained BEFORE the notice of meeting was sent.