

Case Manager Responsibilities

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Chapter 1

Case Manager Responsibilities

It is the case manager responsibility to ensure that special education services and related services are provided to the child as outlined in the child's IEP and ***make a good faith effort*** to assist the child to achieve the goals listed on the IEP.

General Description

A case manager is a licensed teacher or related service provider who is a member of the IEP team and is responsible to coordinate instruction and related services for the student. The case manager will coordinate the delivery of special education services and will be the primary contact for the parent.

The primary responsibilities of the case manager are to:

- assure compliance with procedural requirements,
- communicate and coordinate among home, school, and other agencies, regular and special educational programs,
- facilitate placement,
- train classroom staff, and
- schedule team meetings.

The case manager responsibilities are numbered below and provide parameters around their professional responsibilities.

Responsibility #1: Due Process

Case managers will meet due process standards set by the district. Special Education Administrative staff may conduct file reviews to monitor due process. This may consist of a review of a student(s) special education file, evaluation reports, and any part of the IEP/IIIP.

- PLAAFP
- Goals and objectives written in measurable format
- Strengths/Limitations/Needs
- Statewide assessments
- Extended School Year
- Modifications and Accommodations (including consideration of

- assistive technology and graduation plan as necessary)
- Services (Frequency per week)
 - Least Restrictive Environments
 - Extended School Year
 - Reports individual student achievement according to the standard in the school based on documentation of student progress

Responsibility #2: Working with Parents

- Meets parents
- Establishes a mechanism to communicate with parents (i.e., notebook, phone log, e-mail, fax, etc.
- Responsible for IEP development, progress reporting and overall communication.

Responsibility #3: Organization

- Establishes and maintains a student file.
- Plans weekly schedule for all educational assistants working with student on caseload.
- Plans lessons/activities for each student on caseload.
- Completes all reports
- Assures that all materials and services are in place for the student.

Responsibility #4: Communication

- Communicates all decisions, plans and policies to parents and team members and advocates.
- Communicates needs of the student's safety and welfare to all team members.
- Establishes ongoing communication with parents for student progress and/or concerns.
- Documents parent communication plan and establishes a system of documentation of contacts *Use the communication tab in CAMPUS to document parent communication. Case managers can also use parent contact logs.

Responsibility #5: Classroom Management

Trains, reviews and collaborates with classroom staff the following:

- Student Health and Safety Plans
- Student disabilities
- Specific health and safety concerns/student responses
- Student's personal equipment and how to use to support academic achievement
- School equipment used by students to support academic achievement

- Special communication systems or specific strategies for the student
- Specific student needs to support progress
- Behavioral Intervention Plans
- Student specific safety plans for school and the bus

Emergency Plans and Procedures

- Emergency cards for each student
- Emergency evacuation plans for individual students and class
- Fire drills
- Tornado drills
- Universal precautions
- Lock down procedures for the class

Classroom Records

- Attendance
- Documentation charts/reports for student achievement
- Health and Safety Reports
- Incident Accident Reporting Form (Students and Staff)
- Continuous Improvement and Monitoring Plan forms
- Petty cash
- Ordering supplies and materials
- Equipment repairs

Schedules

- Student
- Staff
- Classroom

Responsibility #6: Classroom Staff Training

The case manager, related service staff, and administration train classroom staff:

- District Competence
- Site-based training
- District wide training
- Building policies and procedures
- Use of district vehicles

Responsibility #7: Field Trips and Transportation

- Field trip permission forms
- Emergency cards and supplies to be taken on field trips
- Sign-out procedures

Responsibility #8: Substitute Folder (to include)

- Lesson plans
- Classroom schedules
- Student information
- Emergency plans and procedures
- Behavioral Management Plans
- Building Policies and Procedures

Responsibility #9: Pupil Needs Committee (PNC) Team Member

Special education teachers are expected to be part of the building PNC that handles all referral to special education. They may be involved in any of the below tasks:

- Provides referral form to teacher who is referring a student
- Collaborate with regular education staff regarding pre-referral interventions
- Notifies team members who need to attend the meeting.
- Establishes meeting times with parents and sends out meeting notice with Parent's Rights Brochure.
- Assures that the referral form from teacher is complete and ready for the special education meeting.
- Follows district guidelines for the identification, assessment and individual educational plans for students qualifying for or receiving special education services.

Responsibility #10: Curriculum

- Develops or incorporates curriculum learning components based on student needs
- Develops and implements modifications and accommodations for each student
- Provides assistive technology as defined in the IEP.
- Establishes and implements graduation plan.
- Provides assessment of student achievement based on curriculum.

Responsibility #11: Instructional Design, Development, and Delivery

- Establishes student baselines before instruction.
- Plans and implements instructional delivery.
- Plans presentation of lesson.

- Documents student response to curriculum.
- Determines assessment plan for curriculum.
- Provides interventions, accommodations and/or adaptations for student achievement
- Structures learning environment for each student
- Behavioral management

Responsibility #12: Professional Development

- Maintains license
- Participates in building and district wide in-service/training
- Participates in building Pupil Learning Communities

Facilitating an IEP Meeting

Pre planning for an IEP Meeting

Prior to holding an IEP meeting, several tasks need to be completed to ensure that the required team members are in attendance and that the information presented is organized. If possible, begin planning for IEP meetings three to four weeks prior to the anticipated meeting time. This will give all team members ample time to prepare and ensure availability for them to attend the meeting.

1. Plan the date and location of the meeting.
2. Verify the time and date with parents/guardians first. Inform parents of who will be attending the meeting as well as the purpose of the meeting. You may also want to provide parents with information about how they can contribute to the meeting.
3. Once the date has been verified with the parent/guardian, coordinate the time and location with the required team members. Federal law requires the following team members to be present at all meetings: *parent/guardian, school district representative, special education teacher, and regular education teacher representative.*
4. All students should be encouraged to attend their IEP meeting. Students in grade eight or age 14 should always be invited to the meeting. If they do not attend, the student should be consulted as to their interests and preferences regarding their educational program.
5. Send a notice of the meeting to parents and enclose the parent's rights brochure with the meeting notice.
6. If it is an annual IEP, begin to compile data on the previous year's goals and objectives. Data should be presented in a manner that reflects the criteria statements in the objectives.
7. Prepare statements on the strengths of the student as well as concerns that need to be addressed.

Before the IEP Meeting

The physical set up of the room can lend to a positive and effective IEP meeting. Note the following:

- A room free from outside distractions
- Ample room for all team members to sit and space to take notes.
- Alert office personnel to expect parents and make them feel welcome.
- Hold phone calls.

- Have pencils, paper, and copies of reports available for team members.
- Position team members. The facilitator should sit next to the parent.

Beginning the IEP Meeting

When conducting an IEP meeting, as case manager, it's important to set the tone and purpose of the meeting. Note the following:

- Introduce yourself and invite the other team members to do the same having them state their relationship to the student.
- Welcome the parent and give them a copy of parental rights.
- Explain the purpose of the meeting. Set the agenda and ask if there are any additions to the agenda.
- Set time parameters. Communicate with the team that if all agenda items are not addressed, another meeting may need to be held. This motivates all members to stay on task.
- Inform parents that notes will be taken and incorporated into the IEP. You or another team member should take minutes of the meeting. Determine this prior to the meeting. Be sure to record the minutes on the Record of Team Meeting form.

Meeting Etiquette for All Members

Note the following traits for a meeting facilitator and a meeting participant.

Meeting Facilitator

- Be open and encouraging
- Serve as a catalyst by posing questions
- Maintain harmony; remind participants of shared goals and appropriate meeting behaviors
- Don't ramble
- Gather support for ideas before the meeting
- Don't control or dominate the discussion
- Take notes on all that occurs
- Use and elicit "WE" behaviors
- Exercise follow-up questions
- If consensus can't be reached on an issue, discuss follow up options

Meeting Participant

1. Decide to make the meeting worthwhile

2. Attempt to answer the leader's questions, especially if there is long silence
3. Defend your ideas, but exercise appropriate meeting behavior
4. Don't ramble
5. Study the agenda; assemble your information to share. Don't wing it.
6. Practice listening skills; don't engage in side discussions
7. Take notes and ask questions. Note errors that occur, so they can be corrected.
8. Demonstrate a "WE" attitude
9. Suggest closure for items that aren't resolved within allotted time.
10. Volunteer for follow up tasks that are assigned

Conducting the Meeting

When conducting the meeting, note the following tips:

1. Stay student focused
2. Stick to the agenda; ignore irrelevant comments.
3. Use the term **APPROPRIATE** when describing the students program. Do not use the word **BEST**.
4. Watch body language and voice tone. Sandwich problematic issues with positive statements. Disgruntled parents walk away upset because of poor communication.
5. Meet with staff in advance to make sure they are familiar with the needs of the student.
6. Do not take parents complaints personally, however, feel free to adjourn the meeting if members become verbally abusive and reconvene at a later date.
7. Steer away from past problems and focus on the student's future needs.
8. Give consideration to all the parent requests; however, make recommendations based on data and professional expertise.
9. Try to have staff members at the meeting who the parent has developed a level of trust.

Dealing with Demanding Parents

If a meeting with parents becomes volatile, facilitators should use the following tips to maintain a functional meeting.

1. Stay calm. Don't be defensive

2. Again, if the parent uses the term **BEST** to advocate for their child's program, remind the team that their task is to determine the most **APPROPRIATE** program for the student.
3. Do not take parents complaints personally, however, feel free to adjourn the meeting if members become verbally abusive and reconvene at a later date.
4. Maintain an exceptional tracking system that will assist you in meeting due process timelines and progress on goals and objectives. It's easier to defend the student's program when there is data to support the school districts position.
5. Remember parents do not have the right to demand the type of curriculum used with the student.
6. The assignment of teaching or paraprofessional staff that works with the student is a school district decision.

10 Things That Can Slow a Meeting Down

During a meeting, avoiding these problems can lead to a more productive and shorter meeting. Whether you're a facilitator or participant, try and model the following behaviors:

1. Don't interrupt too much
2. Start on time
3. Follow up on your responsibilities
4. Listen and refrain from side bar conversations
5. Try to avoid arriving late
6. Refrain from sarcastic comments that stifle creativity
7. Come prepared
8. Deal with unanticipated issues
9. Stay positive
10. Encourage others who don't participate to share their ideas or concerns

Ending the Meeting

When ending the meeting, it's important to bring proper closure to the decisions made, so every team member understands their responsibilities with the student's educational program.

1. Inform parents that the minutes from the meeting will be incorporated into the IEP.

2. Briefly review the minutes of the meeting from the Record of Team Meeting form
3. Recap the services being offered and any changes that are being recommended.
4. Encourage the parent to review the IEP upon receiving it and call if they have any questions.
5. Thank the parents and team members for coming

**IEP AGENDA
ISD 622 SPECIAL SERVICES**

- Introductions – Initial team meeting notice
- Parent Update
- General Education Teacher Update
- Special Education Staff Update
- Discussion of Areas of Concern
- Discuss New Goals and Objectives
- Review Accommodations and Modifications
- School, District, and State Initiated Assessments
- Review Service Providers and Service Minutes
- Extended School Year Discussion
- Parent or Teacher Questions and Comments
- Third Party Billing
- Discussion of Timeline for Paperwork to be Completed
- Conference Summary Report

Special Education Terminology / Acronyms

ASD	Autism Spectrum Disorders - Difficulty with communication and social interaction; can range from Mild-Severe, includes Asperger Syndrome; may be neurobiological in nature.
CD	Communication Disorders - Problems articulating sounds; problems with expressing oneself (language problems); may be non-verbal and need assistive technology to communicate; voice problems; fluency/stuttering problems.
CID	Communication Interaction Disorders
D/APE	Developmental Adapted Physical Education - Child must first have a diagnosed disability from the above list in order to receive P.E. service.
DCD	Developmental Cognitive Disability - Low cognitive ability and low adaptive functioning; Old terminology was Mild-Moderate Mentally Impaired/ Moderate-Severe Mentally Impaired
DD	Developmental Disabilities
D/HH	Deaf or Hard of Hearing
EBD	Emotional-Behavioral Disorders - Inability to cope or to maintain normal relationships; difficulty behaving in a socially appropriate manner (Includes but is not limited to depression, aggression, conduct disorders, may not be in touch with reality).
NBD	Neurobiological Disorder (comes under this category when there is a chemical imbalance instead of behavioral problem)
ECSE	Early Childhood Special Education/Developmental Disabilities (DD) Birth-6 years 11 months; Child diagnosed with any of the above disabilities (Services may be provided in a center-based, home-based, or community based setting)
EIA	Early Intervention Alliance - Birth to Age 2 children with special needs

ELL	English Language Learners (the students)
ESL	English as a Second Language (the program)
FAN	Functional Academic Needs
LEP	Limited English Proficiency
OHD	Other Health Disabilities - Muscular Dystrophy, Hemophilia, Tourettes, ADD/ADHD, brain tumor; a long list of disabilities that fit into this category exists which often results in excessive absenteeism and lowered achievement.
PI	Physically Impaired
SLD	Specific Learning Disability- A significant discrepancy between ability & achievement, processing problems, and underachievement
BI	Traumatic Brain Injury (often as a result of an accident or stroke)
VI	Vision Impaired/Blind
ALC	Alternative Learning Center
BIP	Behavior Intervention Plan
CCC	Curriculum Coordinating Council
CIMP	Continuous Improvement Monitoring Process
CTIC	Community Transition Interagency Committee
FAS	Fetal Alcohol Syndrome
FBA	Functional Behavior Assessment
HSI	Human Services Inc.
III-P	Individual Interagency Informational Plan

IEP	Individual Educational Plan
IFSP	Individual Family Special Plan
IEIC	Interagency Early Intervention Committee
KLDM	Kindergarten Language Development Model
LCTS	Local Collaborative Time Study
MAP	Measures of Academic Progress
MARSS	Minnesota Automated Reporting Student System
MDE	Minnesota Department of Education
PBIS	Positive Behavior Intervention Supports
PLC	Professional Learning Community
PRT or TPR	Parental Rights Terminated or Terminate Parental Rights
RTI	Response to Intervention
SIOP	Sheltered Instructional Observation Protocol
SAC	Subject Area Committee (relates to Curriculum); there is an elementary and secondary curriculum committee and also special ed. elem. & secondary.
SCOPE	School and Community Opportunities for Preschool Exception Age 3-5 special needs children served in the home or community, i.e., St. Marks Nursery School, Community Nursery School, B. Lake or DEC Stepping Stones. The least restrictive setting for ECSE
SEED	Seeking Educational Equity and Diversity
TSES	Total Special Education System

