Special Ed Caseload

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Student List in the Caseload | Export the Caseload

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Search Terms: Special Ed Caseload

The Caseload provides two ways users can view the students in their caseloads. Students appear in a user's caseload based on the user's Team Memberships of **Case Manager** or **Service Provider**. Service Providers can also appear if they are selected as providers of Services in the student's Plan. The students who appear in the caseload are not determined by the Year, School, or Calendar selected in the Campus toolbar.

Image 1: Special Ed Caseload

Student List in the Caseload

Clicking on the Caseload tool opens a list view of students in the caseload.

The student's name and the folder icon are links to the Documents tool.

Columns in the table are sortable by clicking the column headers. Drag column headers to the top of the screen to further sort. Click once for ascending and twice for descending.

Field	Description	Populates From

Field	Description	Populates From
School	The school name associated with the student's Primary Enrollment.	Enrollments **Note**: this information is pulled from the Enrollment in which the current/today's date falls into.
Role	The Role of the staff member for the student. This value with either be "Case Manager" or "Service Provider".	Special Ed Team Members
Student	The name of the student. The Name of the student link navigates the user to the student Summary Report. The folder icon navigates the user to the student Special Ed Documents tool.	Demographics
Date of Birth	The student's date of birth and age, calculated based on the current date.	Demographics
Grade	The grade level of the student's most recent enrollment.	Enrollments
Evaluation	The Evaluation Date and Evaluation type from the most current. A padlock icon displays indicating if the Evaluation is locked or not.	Varies by state: Special Ed Documents
Plan Meeting	The Meeting Date from the most recent locked Plan that is NOT an amendment.	Special Ed Documents
Plan	The Plan Date and Plan type from the most recent plan. A padlock icon displays indicating if the Plan is locked or not.	Special Ed Documents
Primary Disability	The identified primary disability of the student, if applicable, from the most recent plan.	Special Ed Documents

For BIE users, Disability, Status, and Setting will report based on the values stored in the most recent, locked plan. Exit Date will report as the latest Exit Date in the student's Enrollment records.

Export the Caseload

Click the **Export to Excel** or **Export to PDF** buttons to view and print the caseload in one of those formats.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	School	Role	Student	Date of Birth	Age	Grade	Evaluation Da	Evaluation Type	Plan Meeting Date	Plan Start Date	Plan End Date	Plan Type	Primary Disability
2	Harrison High	Case Manager	Abegg, Dylan V	9/15/2003	(17y 8mo)	11	10/9/2013	Initial	1/2/2021	1/16/2021	1/15/2022	Plan	10: Other health disabilities
3	Harrison High	Case Manager	Campus, Barry	9/15/2004	(16y 8mo)	10	1/29/2020	Reevaluation	2/1/2021	2/15/2021	2/14/2022	Plan	10: Other health disabilities
4	Harrison High	Case Manager	Chipperfield, Vivien	9/12/2004	(16y 8mo)	10	10/8/2018	Initial	10/23/2020	11/5/2020	11/4/2021	Plan	08: Emotional/behavioral disorders
5	Harrison High	Case Manager	Clipperton, Royce	9/8/2005	(15y 8mo)	10	1/31/2020	Reevaluation	2/2/2021	2/16/2021	2/15/2022	Plan	11: Autism Spectrum Disorder
6	Harrison High	Case Manager	Codling, Jadda	10/24/2005	(15y 7mo)	10	7/6/2020	Reevaluation		7/27/2020	7/26/2021	Interim	11: Autism Spectrum Disorder
7	Harrison High	Case Manager	Cresser, Bernadett	8/5/2005	(15y 9mo)	10	1/30/2020	Reevaluation	1/29/2021	2/12/2021	2/11/2022	Plan	07: Specific learning disabilities
8	Harrison High	Case Manager	Daub, Christoph	7/4/2005	(15y 10mo)	10	2/7/2019	Initial	2/8/2021	2/22/2021	2/21/2022	Plan	02: Developmental Cognitive Disabilities:Mild-Moderate
9	Harrison High	Case Manager	Dettmer, Kieren	8/10/2005	(15y 9mo)	10	9/16/2019	Reevaluation	9/14/2020	9/28/2020	9/27/2021	Plan	04: Physically impaired
10	Harrison High	Case Manager	Drummer, Alastair	9/28/2004	(16y 7mo)	10	1/6/2020	Reevaluation	1/12/2021	1/26/2021	1/25/2022	Plan	11: Autism Spectrum Disorder
11	Harrison High	Case Manager	Eiford, Dia	3/5/2005	(16y 2mo)	10	2/10/2020	Reevaluation	2/2/2021	2/16/2021	2/15/2022	Plan	01: Speech/language impaired

Image 2: Excel Caseload Example

Image 3: PDF Caseload Example