

# Caseload Summary Report

Last Modified on 10/21/2024 8:19 am CDT

[Report Logic](#) | [Report Editor Options](#) | [Generation Steps](#) | [Report Layout](#) | [Report Example](#)

Tool Search: Caseload Summary Report

The **Caseload Summary Report** lists detailed information about each student in a caseload.

**Caseload Summary Report**

This report lists detailed information about each student in a caseload. If an effective date is entered, it will filter the list of students to only those students with an active enrollment as of the effective date entered. If no effective date is entered, the report will filter the list based on the calendar(s) selected.

Plan Types are listed individually and allow the user to choose which to print on the report. Multiple Plan Types can be selected by marking the checkbox next to the plan type. Selecting **Active Plan(s) Only** will result in printing the active plan(s) for each Plan Type selected. The report may be filtered further by selecting **Limit to 1 Plan Per Student**, which limits the printed results to the most recent plan based on the end date, for each plan type.

Caseload Staff can also be limited by **Active Caseload Staff Only**, which limits the staff to active district staff. If no value is selected, the report will default to All Caseload Staff.

Which students would you like to include in the report?

Grade  Ad Hoc Filter

All Students  
12+  
AAP  
core  
EC

Enrollment Effective Date: 03/03/2021

Plan Start Date: [ ] To [ ]  
Plan End Date: [ ] To [ ]

Active Plan(s) Only

**\*Please select to include at least one of the required Plan Types below:**

SPED  
 PLP  
 ILPA  
 RTI  
 Limit to 1 Plan Per Student

Team Roles:  Active Roles Only

All  
Advisor  
Case/Team Manager  
counselor  
Read-Only  
Service Provider

Caseload Staff: [ Select a Value ]

Active Staff Only

Report Output Format: PDF

Which calendar(s) would you like to include in the report?

active year  
 list by school  
 list by year

2020-21  
20-21 SPA HS - Mult Term Sch  
2020-21 2/3 Day Preschool - NH  
2020-21 2/3 Day Preschool - ZL  
2020-21 5 Day Preschool - NHLHC  
2020-21 Adult Academic Program  
2020-21 C & T OUT (Non Rpt)  
2020-21 Early Adventures - Nei  
2020-21 Early Adventures- PLE  
2020-21 Early Childhood (ECSE)  
2020-21 ECFE - FLT (Non Rpt)  
2020-21 ECFE NHLHC (Non Rpt)  
2020-21 ECFE NHLHC Preschool  
2020-21 ESC (Non Rpt)  
2020-21 FAIR School - Crystal  
2020-21 FAIR School Pilgrim  
2020-21 Forest Elementary  
2020-21 Highview Alternative P  
2020-21 Highview Summer  
2020-21 Holy Trinity (Non Rpt)  
2020-21 Home School (Non Rpt)  
2020-21 King of Grace (Non Rpt)  
2020-21 Lakeview Elementary  
2020-21 LockerTestSchool  
2020-21 Meadow Lake Elementary  
2020-21 Neill Elementary  
2020-21 Noble Elementary  
2020-21 Non-Attending Non Pub  
2020-21 Northport Elementary  
2020-21 Open Enrolled OUT (Non

CTRL-click or SHIFT-click to select multiple

*Caseload Summary Report Editor*

## Report Logic

The **SPED Setting** field reports from either the student's IEP (Student Information > Special Ed > Documents > Plan > Enrollment Status editor > Special Ed Setting) or from the Special Ed [Setting](#) tool (Student Information > Special Education > General > Setting), when available.

The Setting tool is only available in select states.

The Caseload Summary Report pull information from the most recent IEP based on the Plan Dates, regardless if the plan is locked or not.

## Report Editor Options

This report lists detailed information about each student in a caseload. The input parameters include two parts. The first section includes parameters to define which students you would like to include in the report. Based on the parameters entered in the section "Which students would you like to include in this report?" the students are first identified by grade or ad hoc (if applicable), and then by those that have an enrollment that overlaps the Enrollment Effective Date (if entered) or calendar if no Enrollment Effective Date has been defined.

The second section of this report will further refine the selected student and enrollment records based on the parameters defined for plan dates, plan types, team roles, caseload staff, and calendars selected. If multiple enrollment records exist for the student within the calendar(s) selected, each will be viewed as a separate, independent record.

Field		Description
<b>Which students would you like to include in the report?</b>	<b>Grade</b>	Selecting a Grade will include only students enrolled in that level.
	<b>Ad Hoc Filter</b>	Selecting a created <a href="#">Ad hoc Filter</a> limits the report to only those students included in the filter.
<b>Enrollment Effective Date</b>		Limits the students included in the report to only those whose enrollment(s) are active on the date entered. If the student has multiple enrollments, all records will display on the report in the calendar selected.
<b>Date Fields</b>	<b>Plan Start Date</b>	Limits the students included in the report to only those whose IEPs and PLPs are active on or after the date entered.
	<b>Plan End Date</b>	Limits the students included in the report to only those whose IEPs and PLPs are active on or before the date entered.

Field		Description
	<b>Active Plan(s) Only</b>	<p>Selecting <b>Active Plan(s) Only</b> will result in printing the active plan(s) for each Plan Type selected.</p> <p>When the Setting tab is used, the following logic determines Setting reports:</p> <ul style="list-style-type: none"> <li>• When the <b>Active Plan Only</b> checkbox is marked, the student's Setting reports from the Setting record on the date the report is generated. If there is no Setting record for that date, the Setting field reports blank.</li> <li>• When the <b>Active Plan Only</b> checkbox is not marked and IEP dates are not entered, the Setting reports from the record overlapping the IEP at any point. If there are multiple Setting records included in the IEP dates, the latest Setting record reports.</li> </ul>
<b>Please select to include at least one of the required Plan Types below:</b>		Available plan types that can be selected include: SPED, PLP, ILPA, and RTI.
<b>Limit to 1 Plan Per Student</b>		This option limits the printed results to the most recent plan based on the end date for each plan type selected.
<b>Team Roles</b>		Select a role to limit the caseload report to only those of staff members in that role.
<b>Active Roles Only</b>		<p>Mark the checkbox to limit the caseload report to those of staff members who have active team membership.</p> <p>This checkbox only impacts the printed report, not the staff list of the report editor.</p>
<b>Caseload Staff</b>		Enter search terms into this field to limit the report to individual caseload staff members.
<b>Active Staff Only</b>		<p>Mark this checkbox to limit the report to only active staff.</p> <p>This checkbox only impacts the printed report, not the staff list of the report editor.</p>
<b>Report Output Format</b>		The default format is PDF. Options include: PDF, HTML, or CSV.
<b>Calendars</b>		Select the Calendars to limit results to those selected.

# Generation Steps

1. Define which students should be included in the report by selecting the desired **Grade Level(s)**, **Ad hoc Filter**, or **Enrollment Effective Date** in *mmdyyy* format, if applicable. Limiting the number of students included in the report will reduce generation time.
2. *Optional*: Enter a **Plan Start Date** and **Plan End Date** in *mmdyyyy* format or by clicking the calendar icon and selecting a date.
3. Mark the **Active Plan(s) Only** checkbox to limit the report to only students with active plans for each plan type selected.
4. Select at least one **Plan Type(s)**. Options include: SPED, PLP, ILPA, and/or RTI.
5. Mark the **Limit to 1 Plan Per Student** checkbox to limit the report to one plan per student per plan type selected.
6. Select the **Team Roles** of staff members for whom caseloads should report.
7. Mark the **Active Roles Only** checkbox to limit the printed report to only active roles.
8. Select specific **Caseload Staff** by entering search terms into the search field.
9. Mark the **Active Staff Only** checkbox to limit the printed report to only active staff members.
10. Select the **Report Output Option** to generate the report in HTML, PDF, or CSV format. The default is a PDF format.
11. Select the **Calendar(s)** that should be included in the report.
12. Click the **Generate Report** button to generate the report in a PDF or HTML format.

# Report Layout

Field	Description	Campus Location
<b>Calendar</b>	The calendar name, start/end date, number of plans and number of students.	Selected in the Caseload Summary Report editor.  calendar.name
<b>Grade</b>	The student's grade level.  <i>Alphanumeric, 2 characters</i>	Enrollments > Grade  Enrollment.grade
<b>Student Name</b>	The student's last and first name.	Demographics > Last Name, First Name  identity.firstName, identity.lastName
<b>Student Number</b>	The student's identification number.	Census > People > Demographics > Person Identifiers > State ID  Person.stateID

Field	Description	Campus Location
<b>Birth Date</b>	The student's date of birth.  <i>Date field, 10 characters, MM/DD/YYYY</i>	Demographics > Birth Date  identity.birthDate
<b>Resident District</b>	The number of the district where the parent/guardian(s) reside.	Enrollments > State Reporting Fields > Resident District  Enrollment.residentDistrict
<b>Disability</b>	The student's primary disability.	Special Ed Documents > IEP > Enrollment Status > Primary Disability OR Enrollments > State Reporting > Primary Disability  Enrollment.disability1 OR PlanState.disability1
<b>Special Ed Status/Setting</b>	Indicates if the student is receiving services through an IEP. The <b>SPED Setting</b> field reports from either the student's IEP (Student Information > Special Ed > Documents > Plan > Enrollment Status editor > Special Ed Setting) or from the Special Ed <a href="#">Setting</a> tool (Student Information > Special Education > General > Setting), if available.	Special Ed Documents > IEP > Enrollment Status > Primary Disability OR Enrollments > State Reporting > Special Ed Setting/Status  Enrollment.specialEdSetting Enrollment.specialEdStatus OR PlanState.specialEdSetting PlanState.specialEdStatus

Field	Description	Campus Location
<b>Re-Eval Date</b>	<p>The date the student will be re-evaluated to determine their need for special education services.</p> <p>Re-Eval Date Logic            For <b>Kentucky</b>: this date is 3 years plus 1 day added to the SEEvaluationResults.referralCheck.            For <b>Ohio</b> or <b>Wyoming</b>: this date is the SEPlan.threeEvalDate            For all other states: this date is 3 years plus 1 day added to the Evaluation.determinationDate            When none of those dates apply, this date is 3 years plus 1 day to the Evaluation.date.</p> <p><i>Date field, 10 characters, MM/DD/YYYY</i></p>	<p>Special Ed Documents &gt; IEP &gt; Education Plan editor &gt; Re-Eval Date            OR            see the Re-Eval Date Logic section</p> <p>Plan.reEvalDate            OR            see Re-Eval Date Logic section</p>
<b>Plan Type</b>	<p>The type of plan selected in the Caseload Summary Report editor.</p>	<p>Selected in the Caseload Summary Report editor.</p>
<b>Start/End Date</b>	<p>The first and last day of the plan.</p> <p><i>Date fields, 10 characters each, MM/DD/YYYY</i></p>	<p>Special Ed Documents &gt; IEP &gt; Education Plan editor &gt; Start Date/End Date</p> <p>Plan.startDate            Plan.endDate</p>
<b>Role</b>	<p>The role designation the person has on the student's Team Members tool.</p>	<p>Special Ed Team Members &gt; Team Member detail &gt; Role</p> <p>teamMember.role</p>

## Report Example

<b>18-19 Harrison High</b> 5856 Peachtree Parkway, Metro City MN 55436 Generated on 02/14/2019 09:56:21 AM Page 1 of 2	<b>Caseload Summary Report</b> Calendar: 18-19 Harrison High All Grades All Roles Staff: 10 Students: 4 Plans: 4
--	---

**1. Allsey, Dino Plans: 1 Students: 1**

Calendar	Grade	Student Name	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date	Plan Type	Start/End Date	Role
18-19 Harrison High 07/02/2018-06/28/2019 Plan: 1 Students: 1	09	Kader, Chad (#118903) Birth Date: 06/05/2004		Speech/language impaired	4 / 00	03/15/2019*	SPED	02/14/2019 - 02/13/2020	

**2. Boyce, Doherty Plans: 1 Students: 1**

Calendar	Grade	Student Name	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date	Plan Type	Start/End Date	Role
18-19 Harrison High 07/02/2018-06/28/2019 Plan: 1 Students: 1	11	Mountain, Naemi (#124264) Birth Date: 06/06/2002		Specific learning disabilities	4 / 01	01/03/2021*	SPED	01/21/2019 - 01/20/2020	Read-Only

**3. Hicks, Danika Plans: 1 Students: 1**

Calendar	Grade	Student Name	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date	Plan Type	Start/End Date	Role
18-19 Harrison High 07/02/2018-06/28/2019 Plan: 1 Students: 1	11	Mountain, Naemi (#124264) Birth Date: 06/06/2002		Specific learning disabilities	4 / 01	01/03/2021*	SPED	01/21/2019 - 01/20/2020	Read-Only

**4. Jones, Barnaby Plans: 1 Students: 1**

Calendar	Grade	Student Name	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date	Plan Type	Start/End Date	Role
18-19 Harrison High 07/02/2018-06/28/2019 Plan: 1 Students: 1	11	Mountain, Naemi (#124264) Birth Date: 06/06/2002		Specific learning disabilities	4 / 01	01/03/2021*	SPED	01/21/2019 - 01/20/2020	Read-Only

**5. Kirk, Deana Plans: 1 Students: 1**

Calendar	Grade	Student Name	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date	Plan Type	Start/End Date	Role
18-19 Harrison High 07/02/2018-06/28/2019 Plan: 1 Students: 1	11	Mountain, Naemi (#124264) Birth Date: 06/06/2002		Specific learning disabilities	4 / 01	01/03/2021*	SPED	01/21/2019 - 01/20/2020	Read-Only

**6. Lifellearn, Dave Plans: 1 Students: 1**

Calendar	Grade	Student Name	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date	Plan Type	Start/End Date	Role
18-19 Harrison High 07/02/2018-06/28/2019 Plan: 1 Students: 1	11	Mountain, Naemi (#124264) Birth Date: 06/06/2002		Specific learning disabilities	4 / 01	01/03/2021*	SPED	01/21/2019 - 01/20/2020	Read-Only

**7. Lifellearn, Mike Plans: 2 Students: 2**

Calendar	Grade	Student Name	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date	Plan Type	Start/End Date	Role
18-19 Harrison High 07/02/2018-06/28/2019	11	Abegg, Dylan V (#171900001) Birth Date: 09/15/2001		Other health	4 / 00	10/11/2014*	SPED	01/19/2019 -	View-Only

Caseload Summary Report Results, PDF Example