

Caseload Summary Report Last Modified on 04/01/2025 1:22 pm CDT

Tool Search: Caseload Summary Report

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

Caseload Summa	ary Report	
This report lists de students to only th report will filter the	stailed information about each student in a caseload. If an nose students with an active enrollment as of the effective list based on the calendar(s) selected.	effective date is entered, it will filter the list of date entered. If no effective date is entered, the
Plan Types are lis by marking the ch Plan Type selecte to the most recent	ted individually and allow the user to choose which to prin eokbox next to the plan type. Selecting Active Plan(s) Or d. The report may be filtered further by selecting Limit to t plan based on the end date, for each plan type.	t on the report. Multiple Plan Types can be selected ily will result in printing the active plan(s) for each 1 Plan Per Student, which limits the printed results
Caseload Staff ca selected, the repo	n also be limited by Active Caseload Staff Only, which li rt will default to All Caseload Staff.	mits the staff to active district staff. If no value is
Which students wo	uld you like to include in the report?	
🖲 Grade	All Students 12+	Which calendar(s) would you like to include in the report?
	core	active year
	EC 💌	◯ list by school
O Ad Hoc Filter	×	O list by year
Enrollment Effecti	ve Date 03/03/2021	2020-21
-		20-21 SPA HS - Mult Term Sch
Plan Start Date		2020-21 2/3 Day Preschool - NH
Plan End Date	то	2020-21 2/3 Day Preschool - 2L 2020-21 5 Day Preschool - NHI C
Active Plan(s) C	univ	2020-21 Adult Academic Program
- /	,	2020-21 C & T OUT (Non Rpt)
*Please select to inc	dude at least one of the required Plan Types below:	2020-21 Early Adventures - Nei
SPED		2020-21 Early Adventures- PLE 2020-21 Early Childhood (ECSE)
PLP		2020-21 ECFE - FLT (Non Rpt)
		2020-21 ECFE NHLC (Non Rpt)
RTI		2020-21 ECFE NHLC Preschool
Limit to 1 Plan P	Per Student	2020-21 ESC (Non Rpt) 2020-21 FAIR School - Crystal
		2020-21 FAIR School Pilgrim
Team Roles	All	2020-21 Forest Elementary
-	Advisor	2020-21 Highview Alternative P 2020-21 Highview Summer
Active Roles On	ly Case/Team Manager	2020-21 Holy Trinity (Non Rpt)
	Read-Only	2020-21 Home School (Non Rpt)
	Service Provider 👻	2020-21 King of Grace (Non Rpt
		2020-21 Lakeview Elementary 2020-21 LockerTestSchool
Caseload Staff	Select a Value	2020-21 Meadow Lake Elementary
		2020-21 Neill Elementary
C Active Staff Only	Y ::	2020-21 Noble Elementary 2020-21 Non-Attending Non Rub
Report Output Form	at	2020-21 Northport Elementary
		2020-21 Open Enrolled OUT (Non 🔻
		CTRL-click or SHIFT-click to select multiple
	Generate Report	
	Caseload Summary Po	port Editor
	Caseluau Sullillaly Re	POILEUILOI

See the Student Information Reports Tool Rights article for tool rights needed to generate this report.



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
Which students would you like to	Grade	Selecting a Grade will include only students enrolled in that level.
report?	Ad Hoc Filter	Selecting a created Ad hoc Filter limits the report to only those students included in the filter.
Enrollment Effectiv	e Date	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.
Date Fields	Plan Start Date	Limits the students included in the report to only those whose IEPs and PLPs are active on or after the date entered.
	Plan End Date	Limits the students included in the report to only those whose IEPs and PLPs are active on or before the date entered.

Field		Description			
	Active Plan(s) Only	 Selecting Active Plan(s) Only will result in printing the active plan(s) for each Plan Type selected. When the Setting tab is used, the following logic determines Setting reports: When the Active Plan Only 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. When the Active Plan Only 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 record reports. 			
Please select to include at least one of the required Plan Types below:	Available RTI.	plan types that can be selected include: SPED, PLP, ILPA, and			
Limit to 1 Plan Per Student	This optic the end d	on limits the printed results to the most recent plan based on late for each plan type selected.			
Team Roles	Select a r that role.	ole to limit the caseload report to only those of staff members in			
Active Roles Only	Mark the checkbox to limit the caseload report to those of staff members who have active team membership. This checkbox only impacts the printed report, not the staff list of the report editor.				
Caseload Staff	Enter sea staff men	rch terms into this field to limit the report to individual caseload nbers.			
Active Staff Only	Mark this This choose the second seco	checkbox to limit the report to only active staff. eckbox only impacts the printed report, not the staff list of the editor.			
Report Output Format	The defau	ult format is PDF. Options include: PDF, HTML, or CSV.			
Calendars	Select the	e Calendars to limit results to those selected.			



Generation Steps

- Define which students should be included in the report by selecting the desired Grade Level(s), Ad hoc Filter, or Enrollment Effective Date in *mmddyyy* 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 *mmddyyyy* 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.

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

Report Layout



Field	Description	Campus Location
Birth Date	The student's date of birth.	Demographics > Birth Date
	Date field, 10 characters, MM/DD/YYYY	identity.birthDate
Resident District	The number of the district where the parent/guardian(s) reside.	Enrollments > State Reporting Fields > Resident District Enrollment. residentDistrict
Disability	The student's primary disability.	Special Ed Documents > IEP > Enrollment Status > Primary Disability OR Enrollments > State Reporting > Primary Disability Enrollment.disability1 OR PlanState.disability1
Special Ed Status/Setting	Indicates if the student is receiving services through an IEP. 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), if available.	Special Ed Documents > IEP > Enrollment Status > Primary Disability OR Enrollments > State Reporting > Special Ed Setting/Status Enrollment.specialEdSetting Enrollment.specialEdStatus OR PlanState.specialEdStatus



Field	Description	Campus Location
Re-Eval Date	The date the student will be re-evaluated to determine their need for special education services. Re-Eval Date Logic For Kentucky : this date is 3 years plus 1 day added to the SEEvaluationResults.referralCheck. For Ohio or Wyoming : 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.	Special Ed Documents > IEP > Education Plan editor > Re- Eval Date OR see the Re-Eval Date Logic section Plan.reEvalDate OR see Re-Eval Date Logic section
Plan Type	The type of plan selected in the Caseload Summary Report editor.	Selected in the Caseload Summary Report editor.
Start/End Date	The first and last day of the plan. Date fields, 10 characters each, MM/DD/YYYY	Special Ed Documents > IEP > Education Plan editor > Start Date/End Date Plan.startDate Plan.endDate
Role	The role designation the person has on the student's Team Members tool.	Special Ed Team Members > Team Member detail > Role teamMember.role

Report Example



18-19 Harrison High 5856 Peachtree Parkway, Metro City MN 55436 Generated on 02/14/2019 09:56:21 AM Page 1 of 2		Caseload Summary Report Calendar: 18-19 Harrison High All Grades All Roles					
Generated on 02/14/20	19 09.50.21 AM Fage For 2			Stall: 10 3	Students: 4 Plans: 4		2
1. Allsey, Dino Plans: 1	Students: 1						
Calendar	Grade Student Name Birth Date	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date Plan Ty	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	Sp	eech/langua impaired	age 4/00	03/15/2019* SPED	02/14/2019	
2. Boyce, Doherty Plans	s: 1 Students: 1						
Calendar	Grade Student Name Birth Date	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date Plan Ty	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	Read-Only
3. Hicks, Danika Plans:	1 Students: 1						
Calendar	Grade Student Name Birth Date	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date Plan Ty	Start/End pe 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	Read-Only
4. Jones, Barnaby Plans	s: 1 Students: 1						
4. Jones, Barnaby Plans Calendar	s: 1 Students: 1 Grade Student Name Birth Date	Resident District	Disability	Special Ed. Status/Setting	Re-Eval Date Plan Ty	Start/End pe Date	Role
4. Jones, Barnaby Plan Calendar 18-19 Harrison High 07/02/2018-06/28/2019 Plan: 1 Students: 1	s: 1 Students: 1 Grade Student Name Birth Date 11 Mountain, Naemi (#124264) Birth Date: 06/06/2002	Resident District	Disability Specific learning disabilities	Special Ed. Status/Setting 4 / 01	Re-Eval Date Plan Ty 01/03/2021* SPED	Start/End Date 01/21/2019 01/20/2020	Role Read-Only
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Caseload Summary Report Results, PDF Example