Caseload Summary Report

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Tool Search: Caseload Summary Report

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

Caseload Summary Report Editor

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 include in the report?	**Grade**	Selecting a Grade will include only students enrolled in that level.
	Ad Hoc Filter	Selecting a created Ad hoc Filter limits the report to only those students included in the filter.
Enrollment Effective 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 records included in the IEP dates, the latest Setting record reports.
Please select to include at least one of the required Plan Types below:		Available plan types that can be selected include: SPED, PLP, ILPA, and RTI.
Limit to 1 Plan Per Student		This option limits the printed results to the most recent plan based on the end date for each plan type selected.
Team Roles		Select a role to limit the caseload report to only those of staff members in that role.
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 search terms into this field to limit the report to individual caseload staff members.
Active Staff Only		Mark this checkbox to limit the report to only active staff. This checkbox only impacts the printed report, not the staff list of the report editor.
Report Output Format		The default format is PDF. Options include: PDF, HTML, or CSV.
Calendars		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 *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.

Report Layout

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. *Alphanumeric, 2 characters*	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

Field	Description	Campus Location
Birth Date	The student's date of birth. *Date field, 10 characters, MM/DD/YYYY*	Demographics > Birth Date 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.specialEdSetting 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. *Date field, 10 characters, MM/DD/YYYY*	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

1. Allsey, Dino   Plans: 1   Students: 1

Calendar	Grade Student Name Birth Date	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 Birth Date	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 Birth Date	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 Birth Date	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 Birth Date	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 Birth Date	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 Birth Date	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