

# Special Ed Caseload

Last Modified on 01/09/2026 9:36 am CST

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Tool Search: 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.

Special Ed Caseload ☆

Student Information > Special Ed > Special Ed Caseload

Related Tools ^



Export to Excel

Export to PDF

Case Manager Count: 0

Service Provider Count: 1

Drag a column header and drop it here to group by that column

School	Role	Student ↑	Date of Birth	Grade	Evaluation	Plan Meeting ⓘ	Plan	Primary Dis...
Robbinsdale Armstrong High School	Service Provider	Anderson, Brielle C 	10/26/2005 (18y 7mo)	12	04/04/2024 ⓘ Initial 			

Special Ed Caseload

See the [Special Ed Caseload Tool Rights](#) article for information about rights needed to use this tool.

## 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.

Click the column headers to sort the columns in the table. To sort further, drag the column headers to the top of the screen. Click once to ascend and twice to descend.

Field	Description	Populates From
<b>School</b>	The school name associated with the student's Primary Enrollment.	Enrollments  <b>Note:</b> This information is pulled from the Enrollment in which the current/today's date falls.
<b>Role</b>	The Role of the staff member for the student. This value is either "Case Manager" or "Service Provider".	<ul style="list-style-type: none"> <li>• Special Ed Team Members</li> <li>• Special Ed Documents &gt; Service editor Start and End Date</li> <li>• Special Ed Documents &gt; Plan Start and End Dates</li> </ul>
<b>Student</b>	The name of the student. The Name of the student navigates the user to the student Summary Report. The folder icon navigates the user to the student Special Ed Documents tool.	Demographics
<b>Date of Birth</b>	The student's date of birth and age, calculated based on the current date.	Demographics
<b>Grade</b>	The grade level of the student's most recent enrollment.	Enrollments
<b>Evaluation</b>	The Evaluation Date and Type from the most current Evaluation. A padlock icon displays indicating the Evaluation is locked.	Varies by state: Special Ed Documents
<b>Plan Meeting</b>	The Meeting Date from the most recent locked Plan that is NOT an amendment.	Special Ed Documents
<b>Plan</b>	The Plan Date and Plan type from the most recent plan. A padlock icon displays indicating the Plan is locked.	Special Ed Documents
<b>Primary Disability</b>	The identified primary disability of the student, when 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.

