

Caseload Planning Guide

Purpose: *Helps special educators build clarity, confidence, and intentionality at the start of the school year. This worksheet supports strategic planning, prioritization, and self-awareness to support strong case management.*

Caseload Overview

Name: _____

School / Program: _____

Number of Students on Caseload: _____

Grade Levels Covered: _____

At-a-Glance Caseload Map

(You can add initials or first names only, depending on privacy practices)

Student	Eligibility	Primary Need	Service Minutes	Gen Ed Classes	Priority Area

Deep Dive Reflection Questions

1. Which students are completely new to me this year?

2. Which students have complex or high-intensity needs?

3. Who is likely to require the most collaboration with gen ed staff?

4. Who has IEP goals I need to review or better understand?

5. Do I have any students with upcoming evaluations, transitions, or key deadlines?

Customize headings and table as needed:

Student Name	Annual Review Due Date	3-Year Eligibility Due Date

6. What areas of support or training do I need to feel confident supporting this caseload?

First 30 Days – Action Planning

Task	Student(s)	Target Completion Date	Notes
Schedule initial family check-ins			
Review current IEPs in depth			
Create service schedule			
Share Snapshot Sheets with Gen Ed			
Connect with providers / related services			
Organize caseload folder / digital binder			