Special Education Caseload Checklist

Special Education · PreK–12

Organize caseload deadlines, services, accommodations, progress monitoring, collaboration, and confidential documentation.

Caseload Overview

- [ ] List every student on your caseload with grade level and key contacts.
- [ ] Record annual review and re-evaluation due dates in one calendar.
- [ ] Store caseload lists securely and limit access to authorized personnel.
- [ ] Set reminders well ahead of each compliance deadline.

Services & Scheduling

- [ ] Record service minutes, settings, and providers from each student's IEP.
- [ ] Build a service schedule that matches each student's plan.
- [ ] Coordinate schedules with general education teachers and related service providers.
- [ ] Track missed services and address them according to district procedures.

Accessibility & Instructional Supports

- [ ] Share each student's accommodations with the staff who implement them.
- [ ] Provide accessible materials, such as large print, audio, or digital text, as plans require.
- [ ] Plan instructional adaptations based on each student's individual goals.
- [ ] Check that assistive technology is available, working, and used as planned.
- [ ] Review each student's accommodations for classroom and state assessments.

Progress Monitoring & Data

- [ ] Set up a progress-monitoring tool for each IEP goal.
- [ ] Collect data on the schedule written in each goal.
- [ ] Review data regularly to decide whether instruction needs adjusting.
- [ ] Prepare progress reports for families on the required schedule.

Collaboration & Communication

- [ ] Schedule regular check-ins with general education teachers.
- [ ] Plan direction and support for paraprofessionals.
- [ ] Keep a communication log of family contacts.
- [ ] Share meeting dates and updates with the team in advance.

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Documentation & Confidentiality

- [ ] Organize documentation by student and date.
- [ ] Document services delivered as your district requires.
- [ ] Review district procedures and timelines at the start of each year.
- [ ] Rely on each student's individual plan, not this checklist, to determine supports.

A general organizational tool; follow your district's special education procedures. It does not replace individual plans, and legal requirements vary by state and district.

Notes