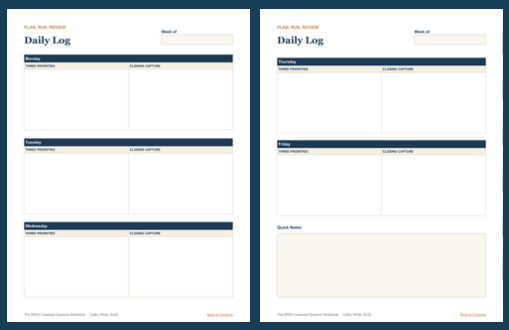
NOT YOUR TYPICAL SPED PLANNER

Built around the real rhythm of special education case management, not just dates, boxes, and task lists.

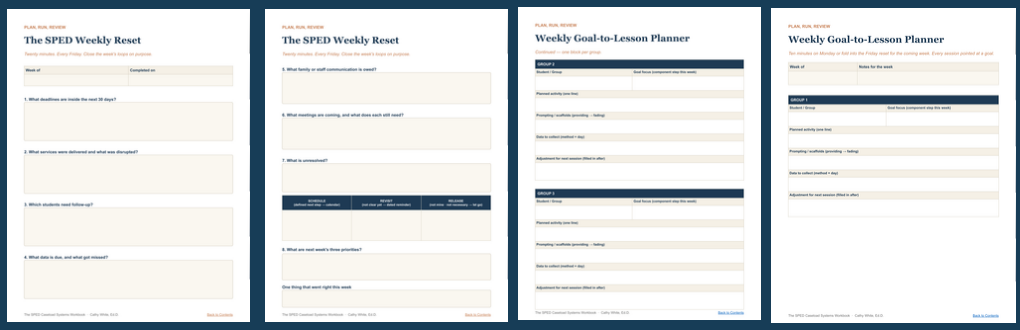
DAILY

Decide what matters and capture what remains.



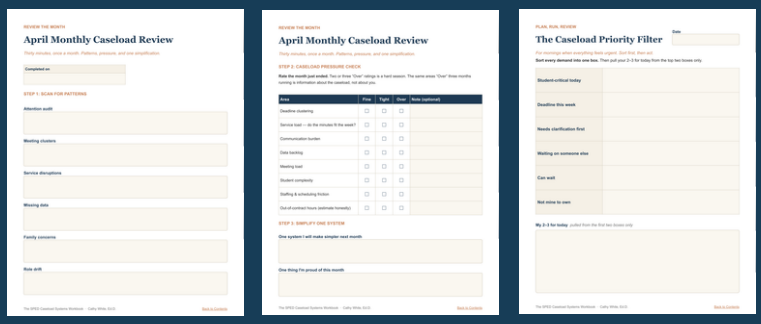
WEEKLY

Surface deadlines, disrupted services, follow-up, and open loops.



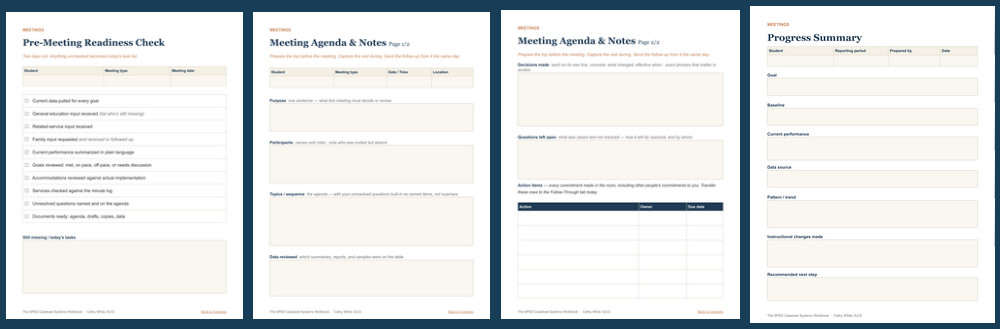
MONTHLY

Notice pressure and patterns before they become crises.



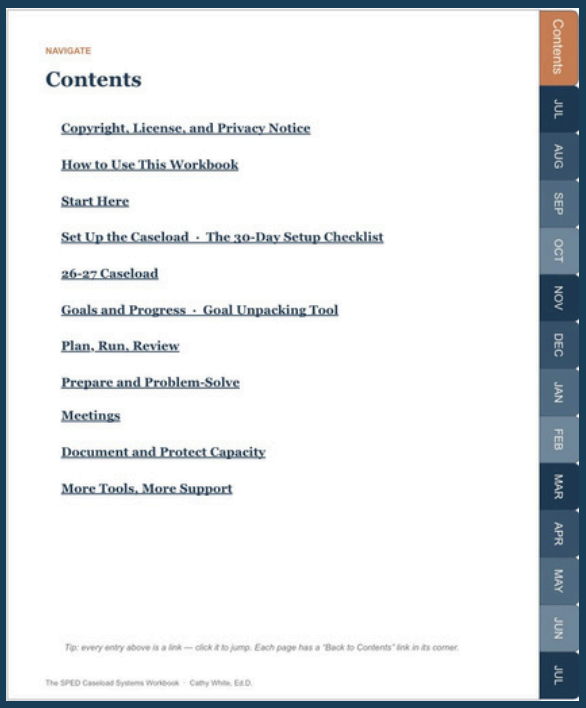
BEFORE MEETINGS

Prepare over three weeks instead of scrambling the night before.



Built to protect time, reduce invisible work, and help you follow through.

CLICKABLE NAVIGATION. DATED WHERE IT HELPS.



CLICKABLE CONTENTS PAGE

Jump directly to any major section.

FLEXIBLE DAILY PAGES

Daily logs are intentionally undated, so you can use them only on school days and skip breaks without wasting pages.



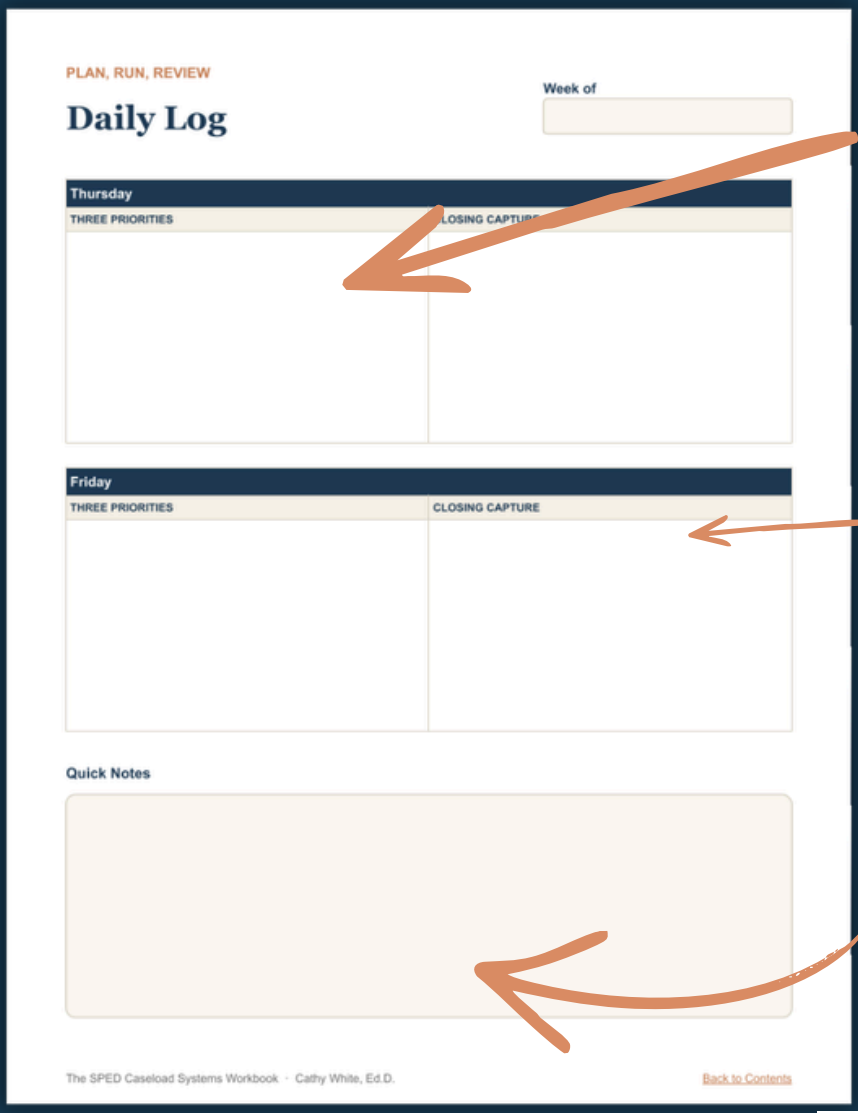
CLICKABLE MONTH AND WEEK TABS

Move through the 2026–2027 school year quickly.

BACK TO CONTENTS LINKS

Return to the main navigation from throughout the planner.

MAKE THE DAY SMALLER


PLAN, RUN, REVIEW

Daily Log

Week of

Thursday

THREE PRIORITIES	CLOSING CAPTURE

Friday

THREE PRIORITIES	CLOSING CAPTURE

Quick Notes

The SPED Caseload Systems Workbook · Cathy White, Ed.D.

Back to Contents

THREE PRIORITIES

Choose what can actually be completed instead of carrying an endless task list.

CLOSING CAPTURE

Record follow-ups, questions, data, and unfinished work before they disappear or stay in your head overnight.

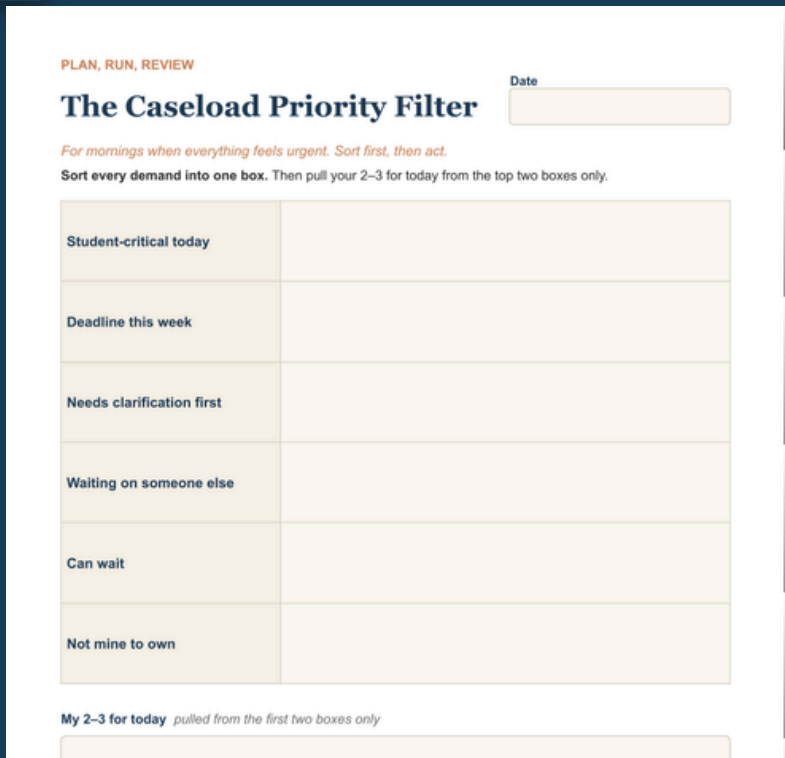
QUICK NOTES

Capture what happened without losing the thread of the day.

CASELOAD PRIORITY FILTER

Sort the avalanche before deciding what deserves your attention.

Sort first. Then choose two or three for today.


PLAN, RUN, REVIEW

The Caseload Priority Filter

Date

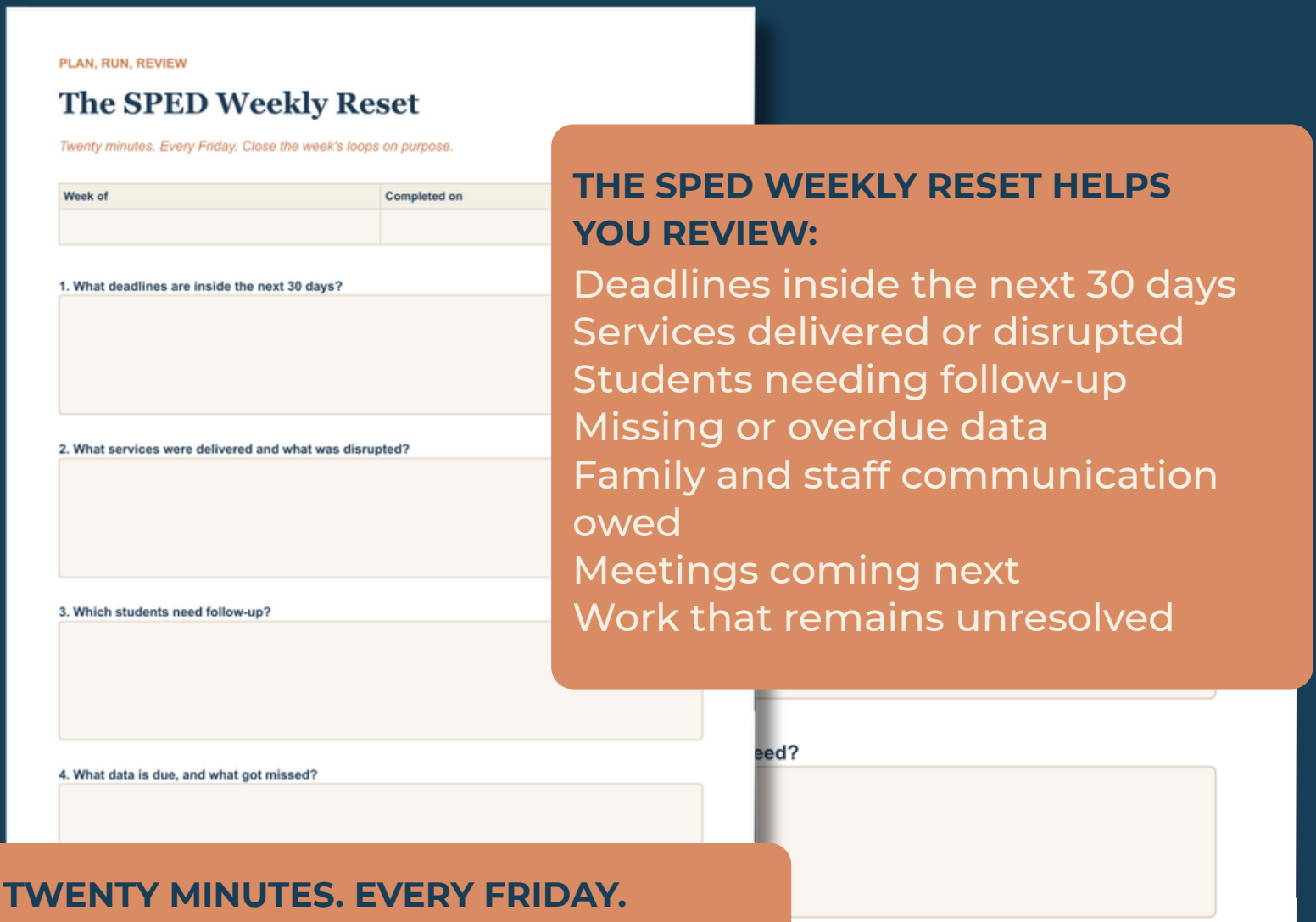
For mornings when everything feels urgent. Sort first, then act.

Sort every demand into one box. Then pull your 2–3 for today from the top two boxes only.

Student-critical today	
Deadline this week	
Needs clarification first	
Waiting on someone else	
Can wait	
Not mine to own	

My 2–3 for today *pulled from the first two boxes only*

CLOSE THE WEEK'S LOOPS ON PURPOSE



PLAN, RUN, REVIEW

The SPED Weekly Reset

Twenty minutes. Every Friday. Close the week's loops on purpose.

Week of	Completed on

1. What deadlines are inside the next 30 days?

2. What services were delivered and what was disrupted?

3. Which students need follow-up?

4. What data is due, and what got missed?

THE SPED WEEKLY RESET HELPS YOU REVIEW:

Deadlines inside the next 30 days
Services delivered or disrupted
Students needing follow-up
Missing or overdue data
Family and staff communication owed
Meetings coming next
Work that remains unresolved

TWENTY MINUTES. EVERY FRIDAY. LESS STRESS AND FEWER ENERGY DRAINS = MORE TIME

SCHEDULE (defined next step → calendar)	REVISIT (not clear yet → dated reminder)	RELEASE (not mine · not necessary → let go)
Put the defined next step on the calendar.	Name when you will return to it.	Stop carrying work that is unnecessary or not yours to own.

8. What are next week's three priorities?

Finish by naming next week's three priorities.

One thing that went right this week

STEP BACK BEFORE PRESSURE BECOMES A CRISIS

REVIEW THE MONTH

April Monthly Caseload Review

Thirty minutes, once a month. Patterns, pressure, and

Completed on

STEP 1: SCAN FOR PATTERNS

Attention audit

Meeting clusters

Service disruptions

Missing data

Family concern

Role drift

The SPED Caseload Systems Workbook · Cathy White, Ed.D.

MONTHLY CASELOAD REVIEWS TURN ISOLATED EVENTS INTO VISIBLE PATTERNS.

REVIEW THE MONTH

April Monthly Caseload Review

Thirty minutes, once a month. Patterns, pressure, and one simplification.

STEP 2: CASELOAD PRESSURE CHECK

Rate the month just ended. Two or three "Over" ratings is a hard season. The same areas "Over" th
running is information about the caseload, not about you.

Area	Fine	Tight	Over	Note (optional)
Deadline clustering	☐	☐	☐	
Service load — do the minutes fit the week?	☐	☐	☐	

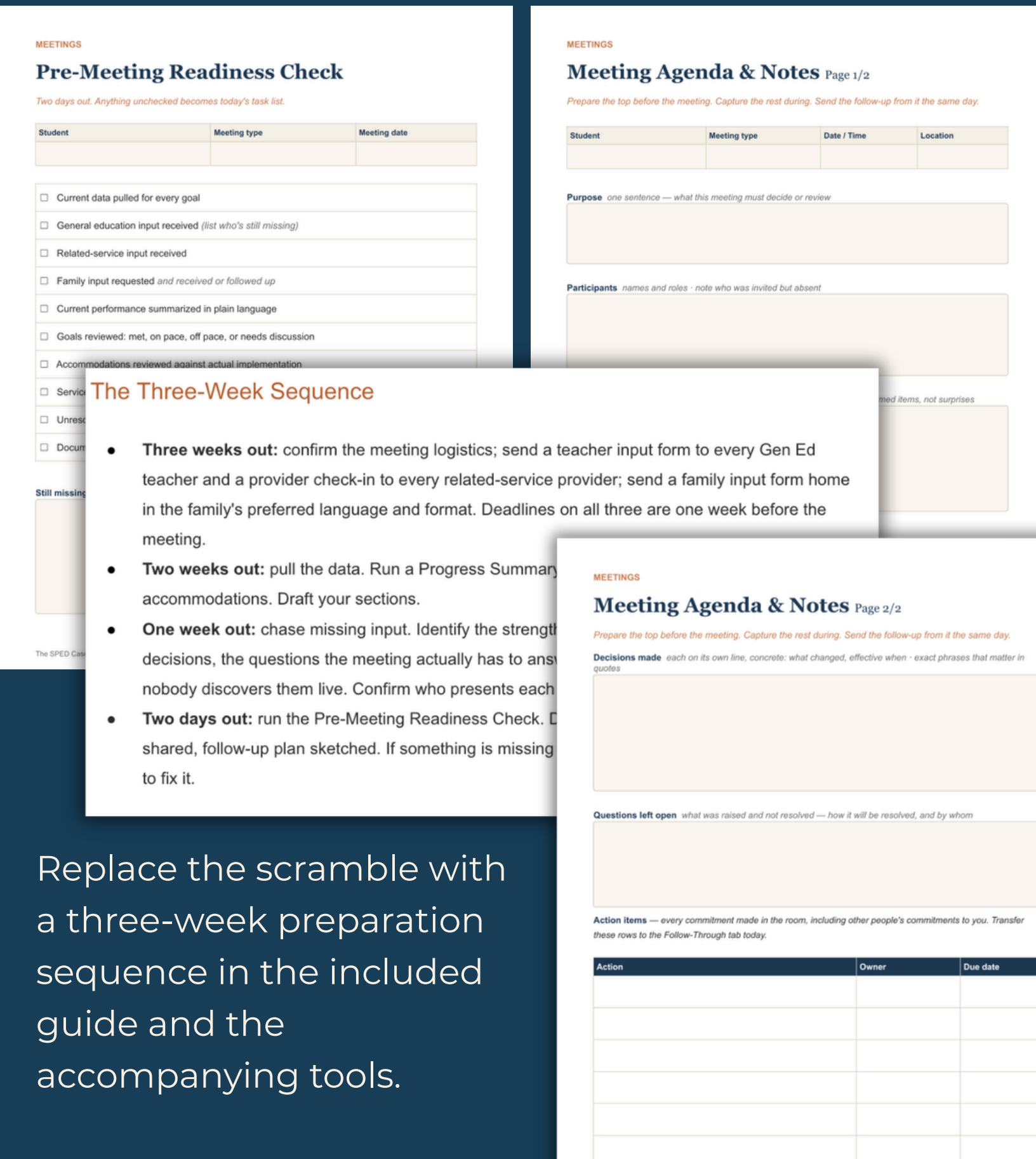
Scan for recurring pressure and unfinished work.
Notice meeting, service, data, and communication patterns.
Check where the caseload feels fine, tight, or over capacity.
Choose one system to simplify for the next month.
Name what is working so it can be protected.

STEP 3: SIMPLIFY ONE SYSTEM

One system I will make simpler next month

One thing I'm proud of this month

STOP PREPARING FOR IEP MEETINGS THE NIGHT BEFORE



MEETINGS

Pre-Meeting Readiness Check

Two days out. Anything unchecked becomes today's task list.

Student	Meeting type	Meeting date

- ☐ Current data pulled for every goal
- ☐ General education input received *(list who's still missing)*
- ☐ Related-service input received
- ☐ Family input requested *and received or followed up*
- ☐ Current performance summarized in plain language
- ☐ Goals reviewed: met, on pace, off pace, or needs discussion
- ☐ Accommodations reviewed against actual implementation
- ☐ Servic
- ☐ Unresc
- ☐ Docum

Still missing

The SPED Cas

MEETINGS

Meeting Agenda & Notes Page 1/2

Prepare the top before the meeting. Capture the rest during. Send the follow-up from it the same day.

Student	Meeting type	Date / Time	Location

Purpose *one sentence — what this meeting must decide or review*

Participants *names and roles · note who was invited but absent*

med items, not surprises

The Three-Week Sequence

- **Three weeks out:** confirm the meeting logistics; send a teacher input form to every Gen Ed teacher and a provider check-in to every related-service provider; send a family input form home in the family's preferred language and format. Deadlines on all three are one week before the meeting.
- **Two weeks out:** pull the data. Run a Progress Summary accommodations. Draft your sections.
- **One week out:** chase missing input. Identify the strengt decisions, the questions the meeting actually has to ans nobody discovers them live. Confirm who presents each
- **Two days out:** run the Pre-Meeting Readiness Check. D shared, follow-up plan sketched. If something is missing to fix it.

MEETINGS

Meeting Agenda & Notes Page 2/2

Prepare the top before the meeting. Capture the rest during. Send the follow-up from it the same day.

Decisions made *each on its own line, concrete: what changed, effective when · exact phrases that matter in quotes*

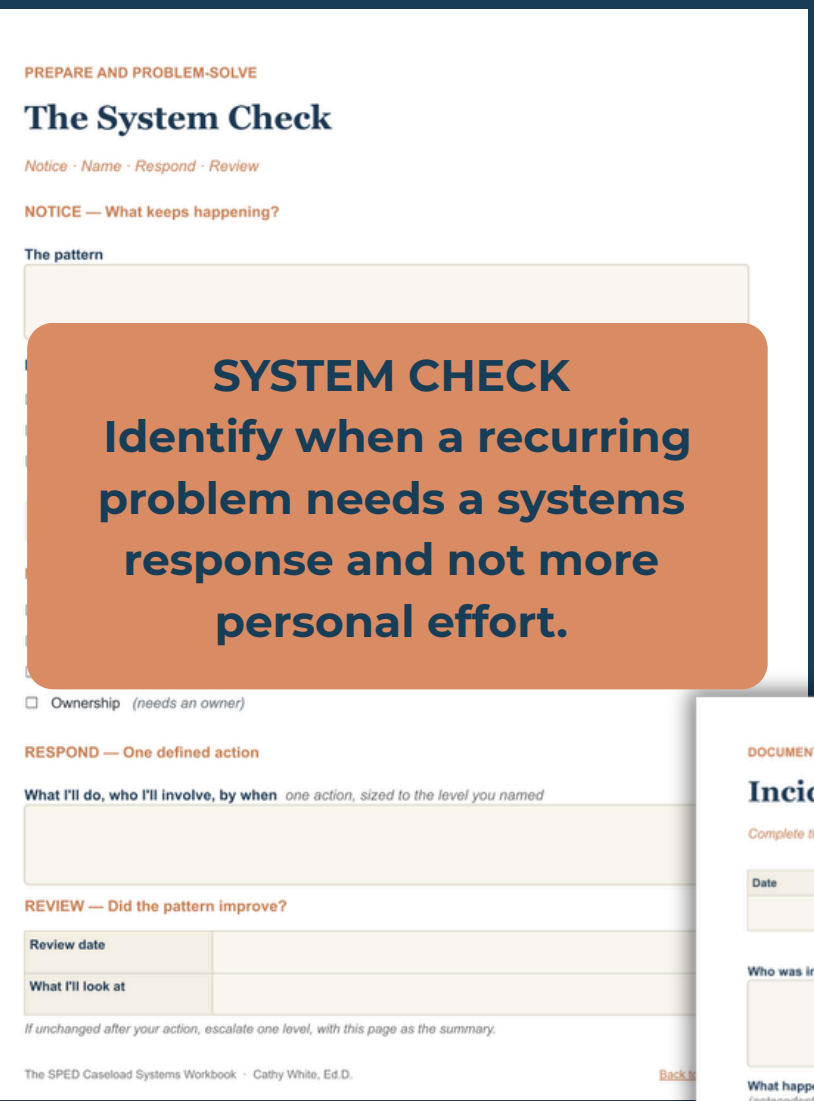
Questions left open *what was raised and not resolved — how it will be resolved, and by whom*

Action items *— every commitment made in the room, including other people's commitments to you. Transfer these rows to the Follow-Through tab today.*

Action	Owner	Due date

Replace the scramble with a three-week preparation sequence in the included guide and the accompanying tools.

TOOLS FOR THE MOMENTS THAT BREAK THE ROUTINE



PREPARE AND PROBLEM-SOLVE

The System Check

Notice · Name · Respond · Review

NOTICE — What keeps happening?

The pattern

☐ Ownership *(needs an owner)*

RESPOND — One defined action

What I'll do, who I'll involve, by when *one action, sized to the level you named*

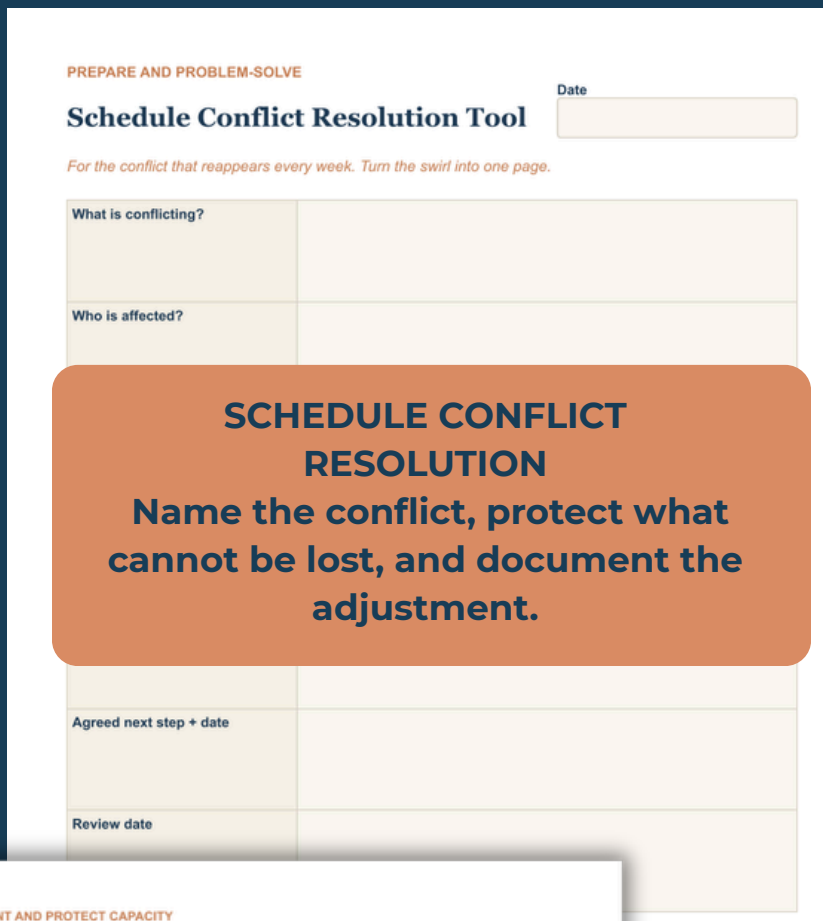
REVIEW — Did the pattern improve?

Review date	
What I'll look at	

If unchanged after your action, escalate one level, with this page as the summary.

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SYSTEM CHECK
Identify when a recurring problem needs a systems response and not more personal effort.



PREPARE AND PROBLEM-SOLVE

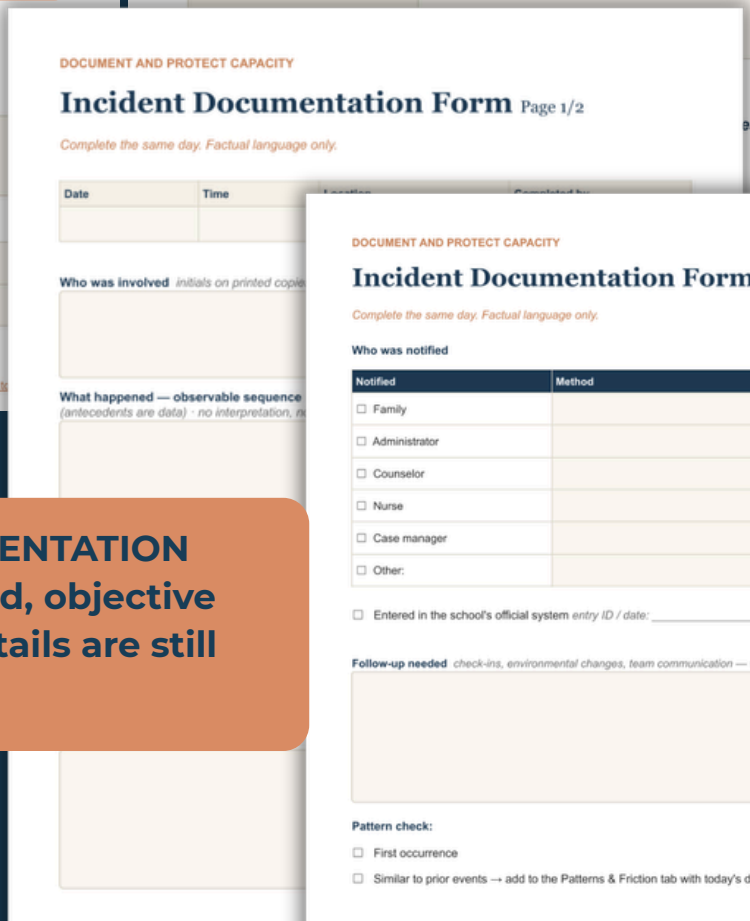
Schedule Conflict Resolution Tool

Date

For the conflict that reappears every week. Turn the swirl into one page.

What is conflicting?	
Who is affected?	
Agreed next step + date	
Review date	

SCHEDULE CONFLICT RESOLUTION
Name the conflict, protect what cannot be lost, and document the adjustment.



DOCUMENT AND PROTECT CAPACITY

Incident Documentation Form Page 1/2

Complete the same day. Factual language only.

Date	Time

Who was involved *initials on printed copies*

What happened — observable sequence *(antecedents are data) · no interpretation, r*

DOCUMENT AND PROTECT CAPACITY

Incident Documentation Form Page 2/2

Complete the same day. Factual language only.

Who was notified

Notified	Method	Time
☐ Family		
☐ Administrator		
☐ Counselor		
☐ Nurse		
☐ Case manager		
☐ Other:		

☐ Entered in the school's official system *entry ID / date:* _____

Follow-up needed *check-ins, environmental changes, team communication — with dates*

Pattern check:

☐ First occurrence

☐ Similar to prior events → add to the Patterns & Friction tab with today's date

INCIDENT DOCUMENTATION
Create a clear, dated, objective record while the details are still fresh.

DON'T START WITH A BLANK PLANNER

Build the caseload system during the first 30 days.

SET UP THE CASELOAD

The First 30 Days

You inherited a caseload, but p
system in an intentional order:

Week	The goa
WEEK 1 · See it	You can a opening a What doe when?
WEEK 2 · Schedule it	Every promise real weekly sch what actually h
WEEK 3 · Teach it	You know what teach, how stu data gets colle
WEEK 4 · Sustain it	Families have knows how you meeting machi needed.

See it

The SPED Caseload Systems Workbook · Cat

Includes the First 30 Days guide and the 30-Day Setup Checklist for building the system in a deliberate order.

The 30-Day Setup Checklist

See it. Schedule it. Teach it. Sustain it.

WEEK 1 · SEE IT

Goal: *answer three questions without opening a plan: who's on my caseload, what does each receive, what's due and when.*

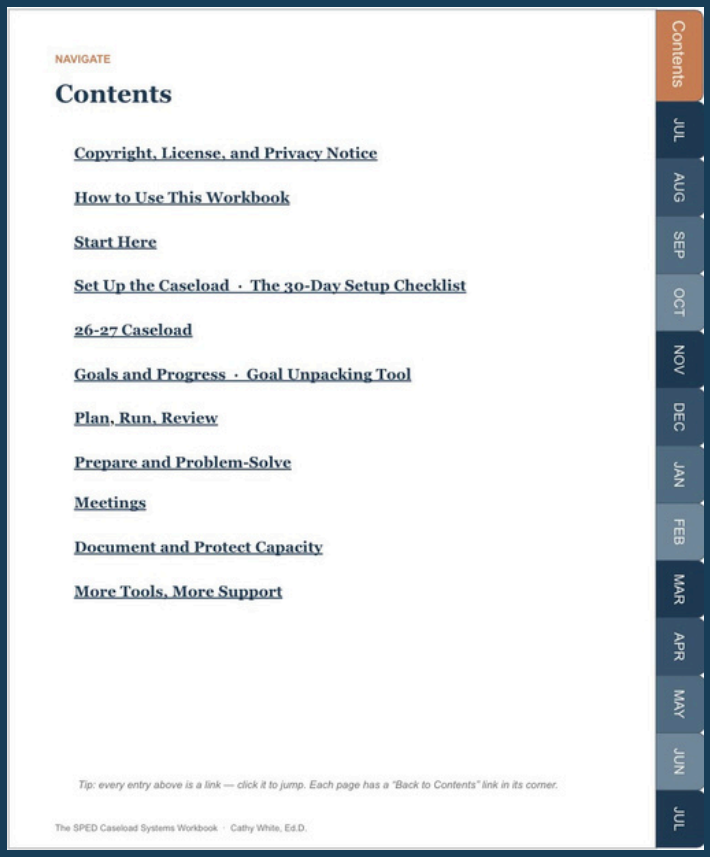
- ☐ Caseload list confirmed in writing
- ☐ All plans read once
- ☐ All dates on calendar with reminders
- ☐ Missing-info list started

WEEK 2 · SCHEDULE IT

Goal: *every promised service minute exists on a real weekly schedule, and you can record what actually happens.*

- ☐ All services on weekly schedule
- ☐ Conflicts identified
- ☐ Conflicts routed or resolved
- ☐ Minute log running
- ☐ Schedule confirmed with all staff by email

WHAT YOU RECEIVE


NAVIGATE

Contents

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How to Use This Workbook

Start Here

Set Up the Caseload · The 30-Day Setup Checklist

26-27 Caseload

Goals and Progress · Goal Unpacking Tool

Plan, Run, Review

Prepare and Problem-Solve

Meetings

Document and Protect Capacity

More Tools, More Support

Tip: every entry above is a link — click it to jump. Each page has a "Back to Contents" link in its corner.

The SPED Caseload Systems Workbook · Cathy White, Ed.D.

Contents JUL AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL

FULL DIGITAL VERSION

One complete, full-color, hyperlinked 2026–2027 planner Slides.

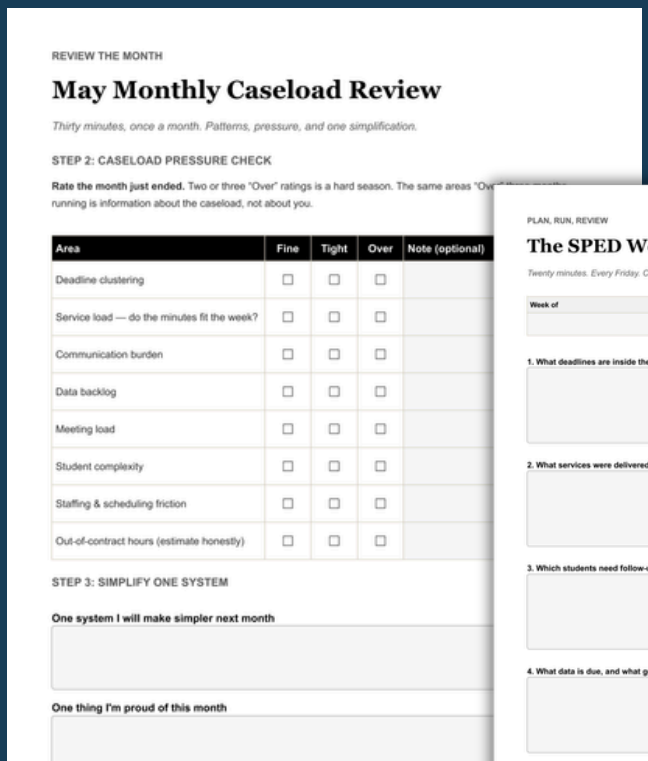
EASIER-TO-USE SECTION FILES

The digital planner is also divided into smaller sections for easier downloading and device use.

- Caseload Systems Planner February-April
- Caseload Systems Planner FULL
- Caseload Systems Planner July-October
- Caseload Systems Planner May-July
- Caseload Systems Planner November-January
- Caseload Systems Planner Sec 1-4
- Caseload Systems Planner Sections 6-9

BLACK-AND-WHITE PRINTABLE VERSION

Print the complete planner or select only the pages and sections you need.


REVIEW THE MONTH

May Monthly Caseload Review

Thirty minutes, once a month. Patterns, pressure, and one simplification.

STEP 2: CASELOAD PRESSURE CHECK

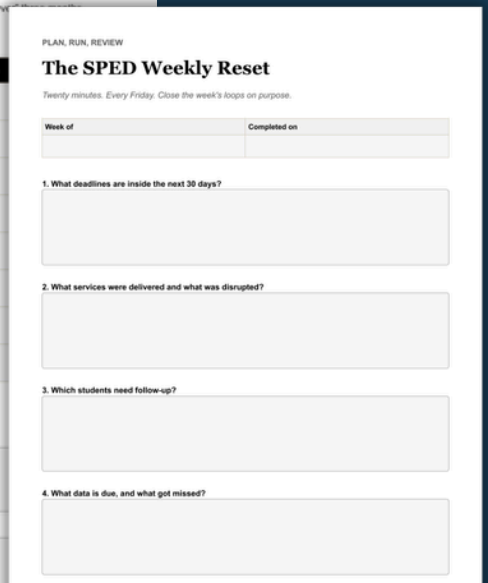
Rate the month just ended. Two or three "Over" ratings is a hard season. The same areas "Ov… running is information about the caseload, not about you.

Area	Fine	Tight	Over	Note (optional)
Deadline clustering	☐	☐	☐	
Service load — do the minutes fit the week?	☐	☐	☐	
Communication burden	☐	☐	☐	
Data backlog	☐	☐	☐	
Meeting load	☐	☐	☐	
Student complexity	☐	☐	☐	
Staffing & scheduling friction	☐	☐	☐	
Out-of-contract hours (estimate honestly)	☐	☐	☐	

STEP 3: SIMPLIFY ONE SYSTEM

One system I will make simpler next month

One thing I'm proud of this month


PLAN, RUN, REVIEW

The SPED Weekly Reset

Twenty minutes. Every Friday. Close the week's loops on purpose.

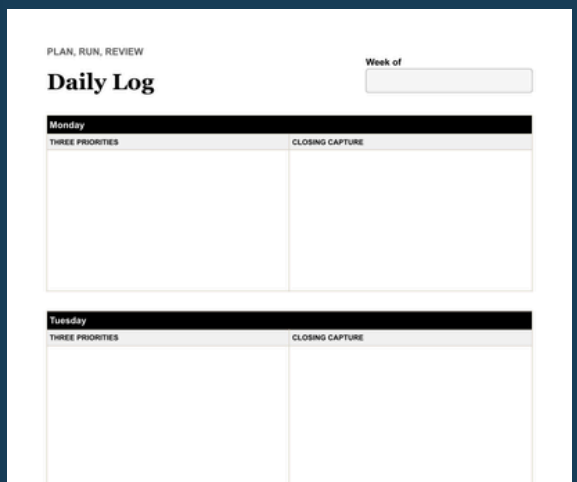
Week of	Completed on

1. What deadlines are inside the next 30 days?

2. What services were delivered and what was disrupted?

3. Which students need follow-up?

4. What data is due, and what got missed?


PLAN, RUN, REVIEW

Daily Log

Week of

Monday	
THREE PRIORITIES	CLOSING CAPTURE

Tuesday	
THREE PRIORITIES	CLOSING CAPTURE

Created for special education teachers, IEP case managers, resource and inclusion teachers, and educators rebuilding scattered caseload systems.

This planner manages the rhythm of the work: planning, priorities, meetings, review, documentation, and follow-through.

The Special Education Caseload Command Center adds the complete systems guide, 12-tab Google Sheets dashboard, expanded editable resources, communication templates, data tools, scripts, and quick-reference guidance.

