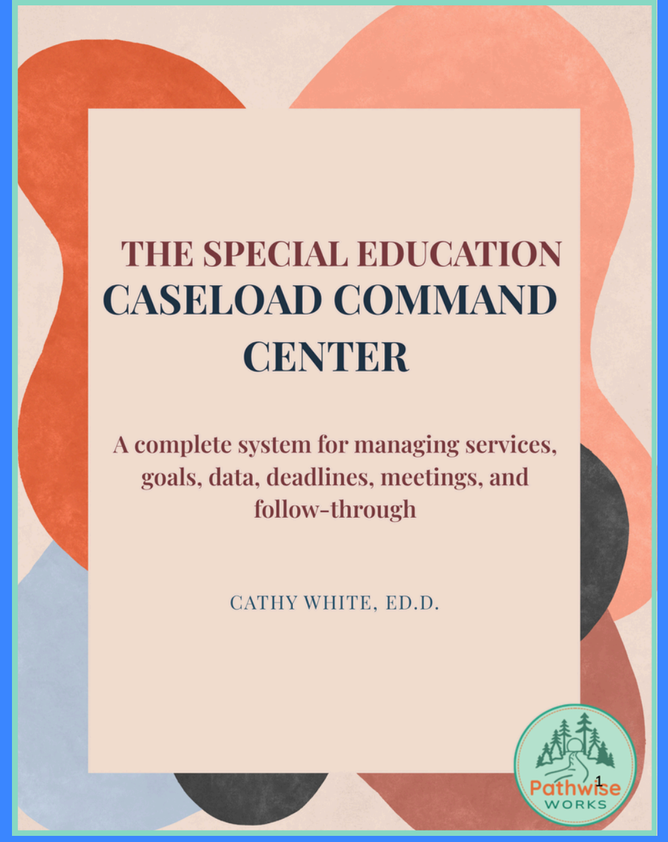


75+ PAGE PDF

45+ TOOLS

12-TAB SHEET

One row per session, logged same-day. The summary block updates itself — refresh view at the Monthly Review.

THIS-MONTH SUMMARY

Disruptions by reason (all rows below):

Student absent	*Testing*	*School event*	*Staff absent*	*Teacher reassigned*
1	1	0	0	1

Undelivered m 110

Date	Student / Group	Service	Scheduled Min.	Delivered Min.	Setting	Disruption Reason	Notes	Follow-Up
10/7	J.M. + M.R.	Resource — reading	30	0	Pull-out	Teacher reassign	Pulled to cover Rm 118, period 1; second reassignment this month	Flag pattern
10/7	K.S.	Push-in — writing	30	30	Push-in	—	Full session; drafted intro paragraph with organizer	None
10/8	A.P.	Resource — social/comm	30	20	Pull-out	Student absent	Left early — nurse; delivered partial	None
10/8	B.N. + S.H.	Resource — math	30	30	Pull-out	—	Fact-fluency probe day	None
10/9	J.M. + M.R.	Resource — reading	30	15	Pull-out	Testing	Building MAP testing ran long	Make-up sch
10/9	D.L.	Resource — self-regulation	25	0	Pull-out	Student unavaila	In-school suspension; coordinate with counselor	Flag pattern
10/10	R.G.	Push-in — language	30	30	Push-in	—	Co-taught vocabulary block with Chen	None
10/13	C.V.	Resource — early literacy	20	20	Pull-out	—	Picture-supported directions worked well	None
10/14	T.W.	Consult	15	15	Consult	—	Reviewed chunked-packet implementation with Rivera	None

CASELOAD DASHBOARD — the home tab

One row per student. Update Current Priority / Next Action at the Friday reset. Dates turn gold within 60 days, blue within 30.

Student	Grade	Case Manager	Eligibility / Support Category	Service Type(s)	Frequency & Minutes	Annual Review	Reeval Date	Related Services	Current Priority	Next Action	Status
J.M.	4	White	SLD	Resource — reading	5x/wk × 30 min	3/14/2027	11/10/2027	Speech 2x/wk (Ch	Fluency data thin	Add 2nd weekly probe starting Mon 10/6	Watch
K.S.	3	White	SLD	Push-in — writing	3x/wk × 30 min	1/22/2027	9/8/2026	OT 1x/wk (Ortiz)	Fine-motor recs overdue	Follow up with OT before annual review draft	Action neede
M.R.	4	White	SLD	Resource — reading	5x/wk × 30 min	5/3/2027	2/18/2028	—	Vowel-team accuracy at 60%	Continue UFLI 61–68; regroup at next review	On track
T.W.	5	White	OHI	Consult + accommodations	Consult 1x/wk ×	11/30/2026	4/14/2027	—	Accommodation not consistent in science	Confirm pre-chunked packets with Rivera	Watch
A.P.	2	White	Autism	Resource — social/comm	4x/wk × 30 min	3/9/2027	10/2/2027	Speech 2x/wk (Ch	Transition supports working well	Maintain visual schedule; note for review	On track
D.L.	6	Alvarez	ED	Resource — self-regulation	Daily × 25 min	12/12/2026	12/12/2026	Counseling 1x/wk (	Reeval window opening	Send consent packet home this week	Meeting soon
R.G.	3	White	SLI	Push-in — language	2x/wk × 30 min	6/1/2027	6/1/2028	Speech 3x/wk (Ch	Speech-language lead on goals	Coordinate co-taught language block	On track
B.N.	4	White	SLD	Resource — math	5x/wk × 30 min	4/20/2027	1/15/2028	—	Fact fluency plateau	Add manipulatives; probe 2x/wk	Watch
C.V.	1	Alvarez	DD	Resource — early literacy	Daily × 20 min	2/2/2027	2/2/2027	Speech 2x/wk (Ch	Reeval to determine continued eligibility	Schedule eval team meeting	Meeting soon
S.H.	5	White	OHI	Consult + check-in/out	Consult 1x/wk ×	9/28/2026	5/6/2027	Counseling 1x/wk (	Annual review due within 60 days	Draft present levels; request input from team	Action neede

STAY AHEAD OF MEETINGS, PRESSURE POINTS, AND FOLLOW-THROUGH

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

Month	Completed on

STEP 1: SCAN FOR PATTERNS

Attention audit *which 2–3 students consumed a dis… something unresolved recycling?*

Meeting clusters *look 60–90 days out — any we…*

Service disruptions *from the disruption summ…*

Missing data *which goals have thin or stale … under-evidenced?*

MEETING AGENDA & NOTES

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

…his meeting must decide or review

…who was invited bu…

PRE-MEETING READINESS CHECK

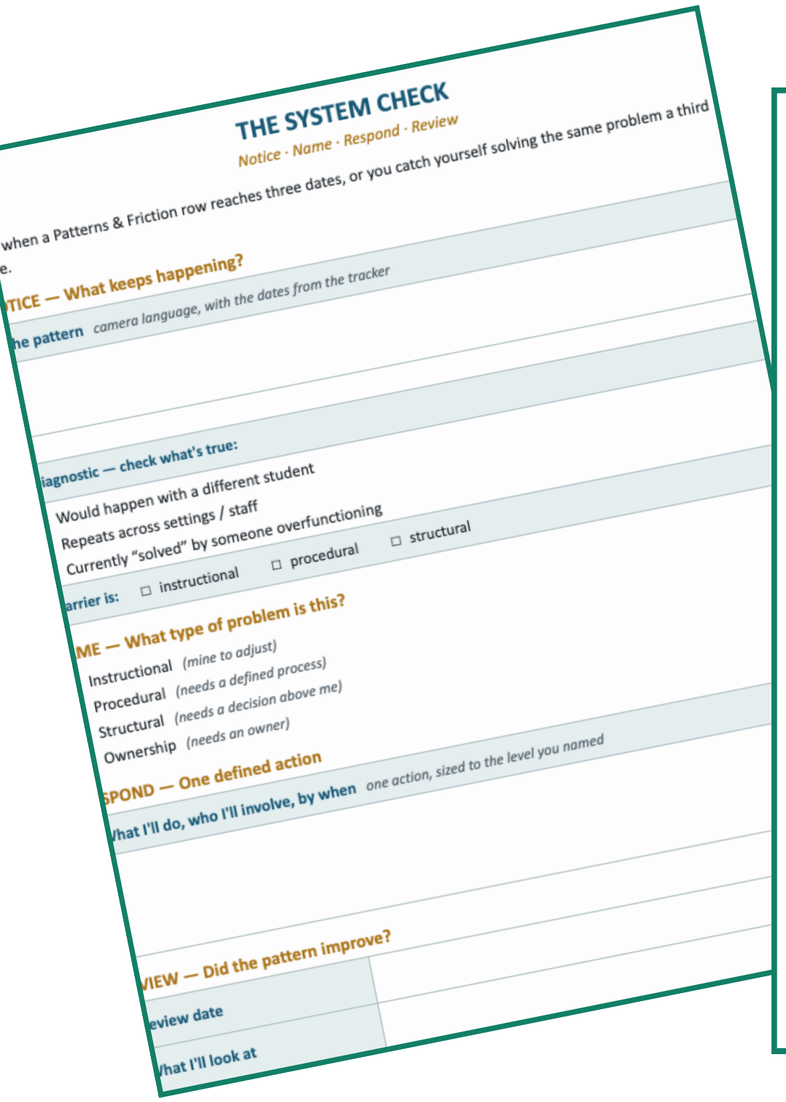
Two days out. Anything unchecked becomes today's task list.

Student	Meeting type	Meeting …

- [ ] Current data pulled for every goal *(Progress Summaries done)*
- [ ] 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
- [ ] Services checked against the minute log
- [ ] Unresolved questions named and on the agenda
- [ ] Documents ready: agenda, drafts, copies, data

Monthly reviews and meeting tools help you prepare, document, and keep next steps visible.

BUILT FOR REAL SPED PROBLEMS



THE SYSTEM CHECK

Notice · Name · Respond · Review

when a Patterns & Friction row reaches three dates, or you catch yourself solving the same problem a third e.

TICE — What keeps happening?

he pattern *camera language, with the dates from the tracker*

iagnostic — check what's true:

Would happen with a different student
Repeats across settings / staff
Currently "solved" by someone overfunctioning

arrier is: ☐ instructional ☐ procedural ☐ structural

ME — What type of problem is this?

Instructional *(mine to adjust)*
Procedural *(needs a defined process)*
Structural *(needs a decision above me)*
Ownership *(needs an owner)*

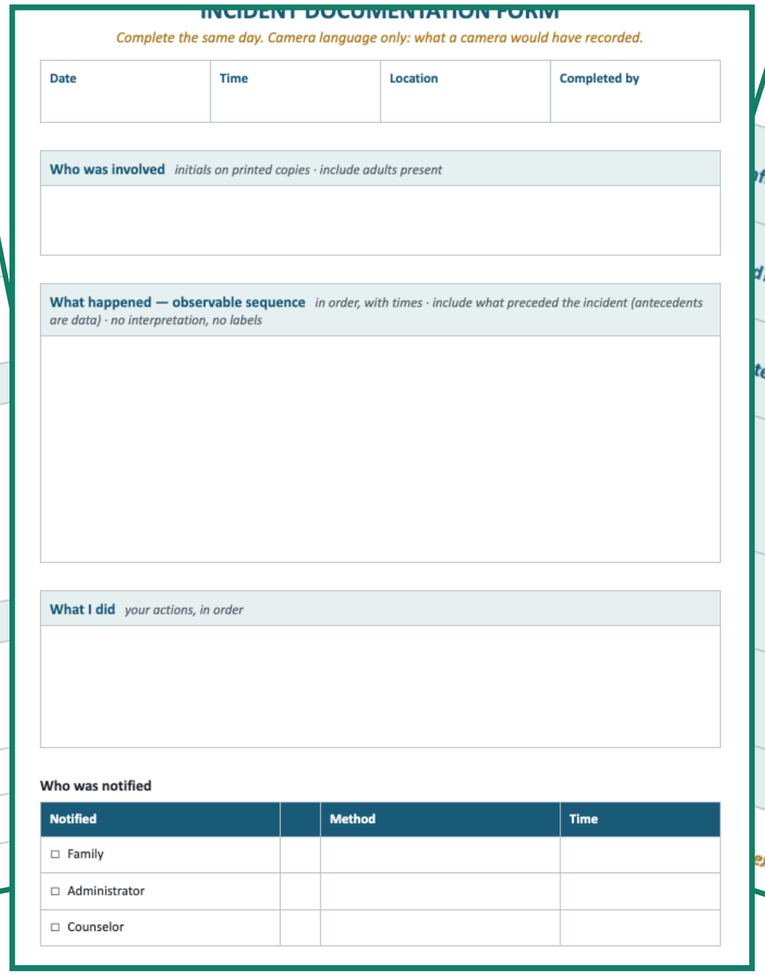
SPOND — One defined action

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

VIEW — Did the pattern improve?

eview date

hat I'll look at



INCIDENT DOCUMENTATION FORM

Complete the same day. Camera language only: what a camera would have recorded.

Date	Time	Location	Completed by

Who was involved *initials on printed copies · include adults present*

What happened — observable sequence *in order, with times · include what preceded the incident (antecedents are data) · no interpretation, no labels*

What I did *your actions, in order*

Who was notified

Notified		Method	Time
☐ Family			
☐ Administrator			
☐ Counselor			



SCHEDULE CONFLICT RESOLUTION TOOL

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

flicting?

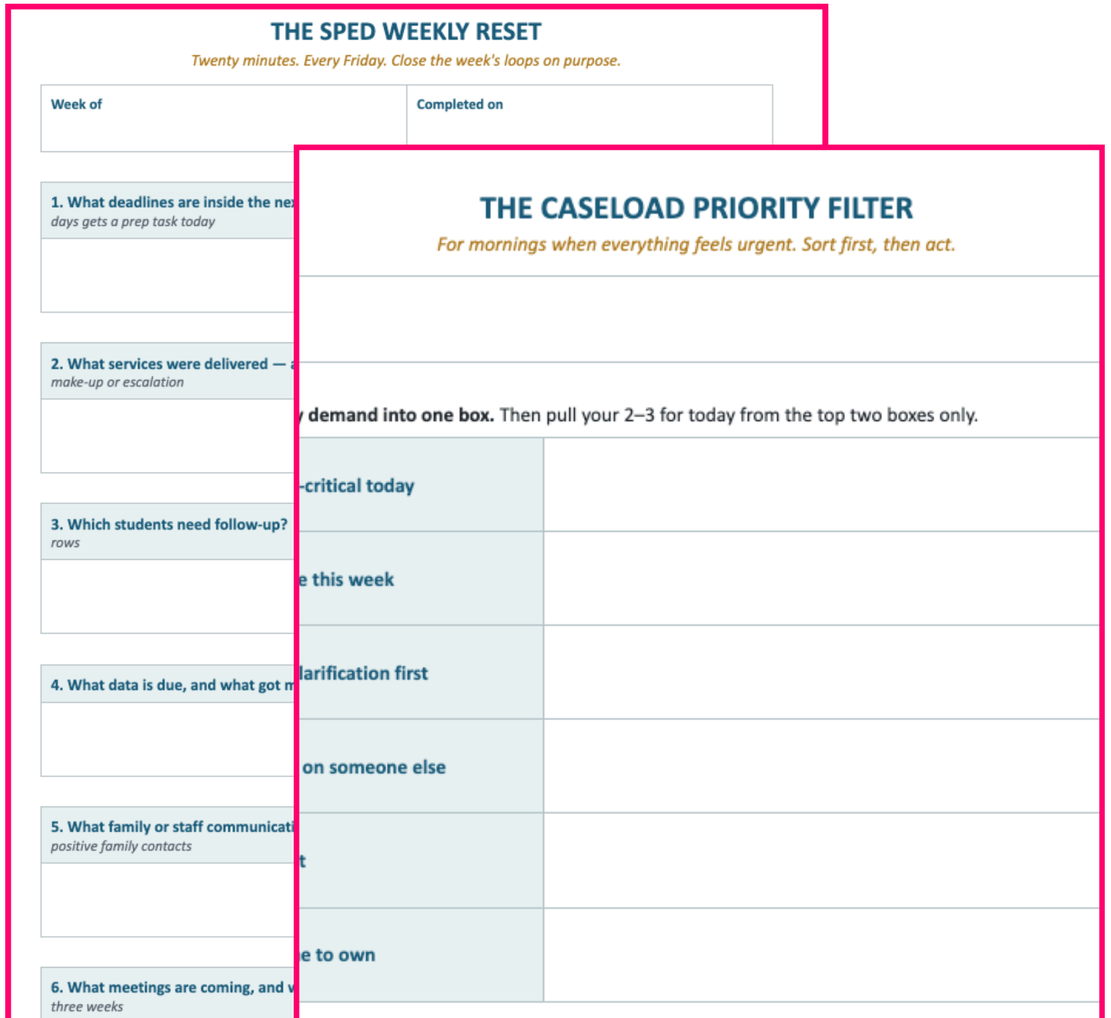
d?

tected?

ex the

Use the included tools when priorities conflict, services get disrupted, incidents happen, or a system keeps breaking down.

RUN THE WEEK WITH MORE CLARITY



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 ne
days gets a prep task today

2. What services were delivered — a
make-up or escalation

3. Which students need follow-up?
rows

4. What data is due, and what got m

5. What family or staff communicati
positive family contacts

6. What meetings are coming, and v
three weeks

THE CASELOAD PRIORITY FILTER

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

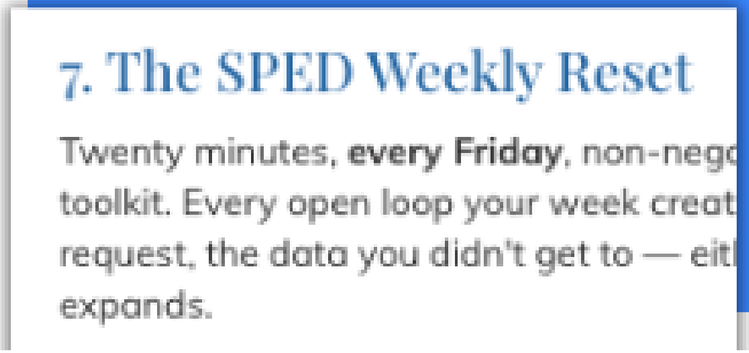
demand into one box. Then pull your 2–3 for today from the top two boxes only.

critical today	
e this week	
larification first	
on someone else	
t	
e to own	

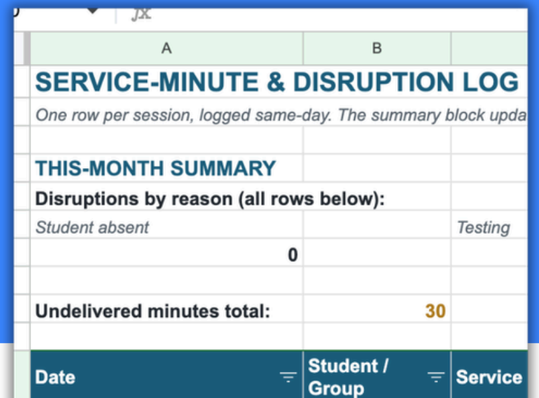
Use weekly resets and priority tools to keep deadlines, services, follow-through, and open loops visible.

EVERYTHING WORKS TOGETHER

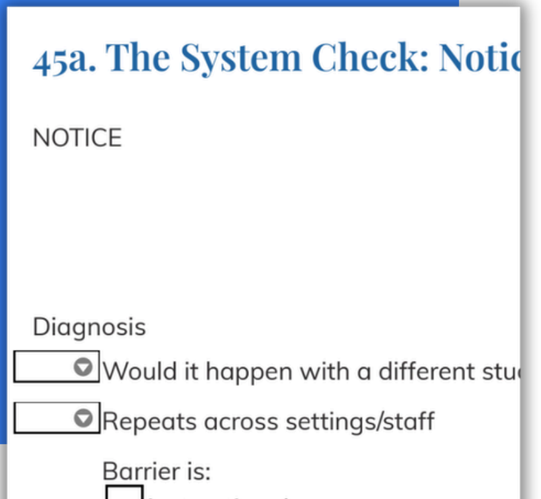
Guides to explain every step



Command Center Workbook



Digital & Print Resources



THE CASELOAD IS MORE THAN PAPERWORK.

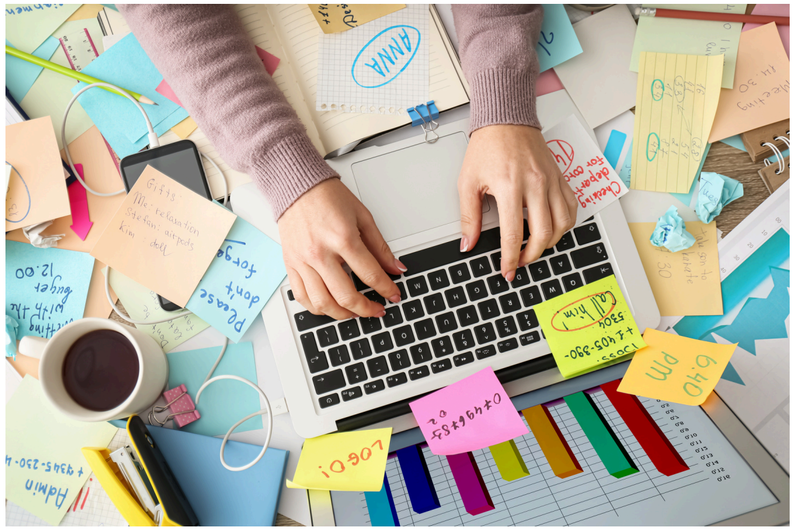
- Services
- Deadlines
- Meetings
- Data
- Parent Communication
- Documentation
- Follow-Through

This system helps you stop chasing the caseload and start running it.

MADE FOR SPECIAL EDUCATION CASE MANAGERS

- New teachers
- Teachers taking over a new caseload
- Rebuilding disconnected systems
- Resource Room Teachers
- Inclusion Teachers

Especially useful if your current system lives in your head, sticky notes, and across too many files.





My name is Cathy White, Ed.D., and I'm the creator behind Pathwise Works. I've spent 25+ years in education, and I build frameworks and systems to help educators have **more time** to actually teach.

Work smarter, not harder!

PATHWISE WORKS

Follow Pathwise Works