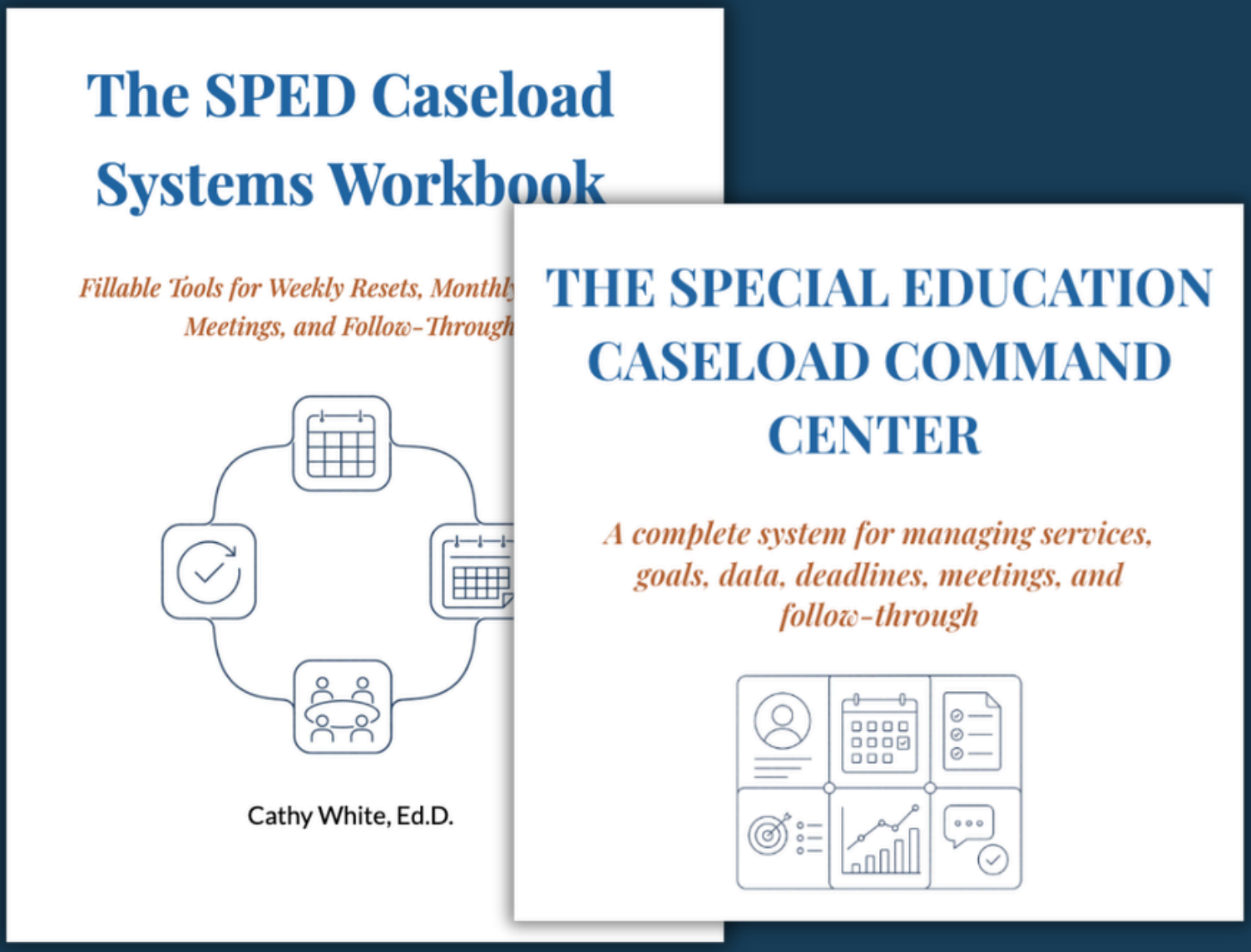
THE COMPLETE SPECIAL EDUCATION CASELOAD SYSTEMS BUNDLE



GUIDANCE • TRACKING • PLANNING • FOLLOW-THROUGH

TWO RESOURCES.
ONE COMPLETE CASELOAD SYSTEM.

THE COMMAND CENTER

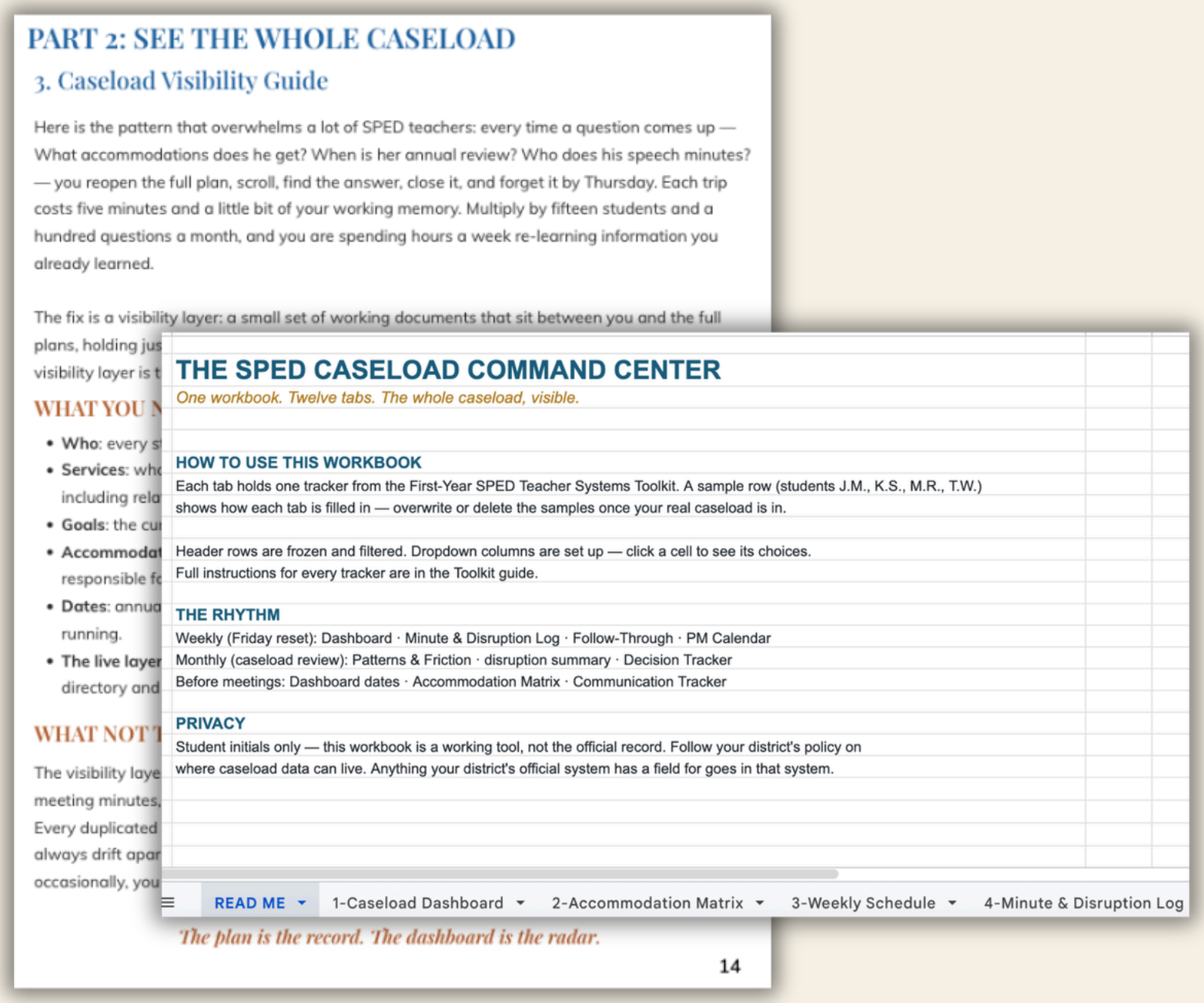
Build the system with the complete guide, 12-tab Google Sheets workbook, editable resources, templates, and decision tools.

THE SYSTEMS WORKBOOK

Use the system throughout the year with 40 weekly spreads, 12 monthly reviews, 20 meeting spreads, and situational tools.

Not just forms. A complete operating system.

Most resources give you pages. This gives you the guide, tools, templates, and tracking system to make the work manageable.



PART 2: SEE THE WHOLE CASELOAD

3. Caseload Visibility Guide

Here is the pattern that overwhelms a lot of SPED teachers: every time a question comes up — What accommodations does he get? When is her annual review? Who does his speech minutes? — you reopen the full plan, scroll, find the answer, close it, and forget it by Thursday. Each trip costs five minutes and a little bit of your working memory. Multiply by fifteen students and a hundred questions a month, and you are spending hours a week re-learning information you already learned.

The fix is a visibility layer: a small set of working documents that sit between you and the full plans, holding jus
visibility layer is t

WHAT YOU N

- **Who**: every s
- **Services**: wh
  including rela
- **Goals**: the cu
- **Accommodat**
  responsible f
- **Dates**: annua
  running.
- **The live layer**
  directory and

WHAT NOT T

The visibility laye
meeting minutes,
Every duplicated
always drift apar
occasionally, you

THE SPED CASELOAD COMMAND CENTER

One workbook. Twelve tabs. The whole caseload, visible.

HOW TO USE THIS WORKBOOK

Each tab holds one tracker from the First-Year SPED Teacher Systems Toolkit. A sample row (students J.M., K.S., M.R., T.W.) shows how each tab is filled in — overwrite or delete the samples once your real caseload is in.

Header rows are frozen and filtered. Dropdown columns are set up — click a cell to see its choices.
Full instructions for every tracker are in the Toolkit guide.

THE RHYTHM

Weekly (Friday reset): Dashboard · Minute & Disruption Log · Follow-Through · PM Calendar
Monthly (caseload review): Patterns & Friction · disruption summary · Decision Tracker
Before meetings: Dashboard dates · Accommodation Matrix · Communication Tracker

PRIVACY

Student initials only — this workbook is a working tool, not the official record. Follow your district's policy on where caseload data can live. Anything your district's official system has a field for goes in that system.

READ ME | 1-Caseload Dashboard | 2-Accommodation Matrix | 3-Weekly Schedule | 4-Minute & Disruption Log

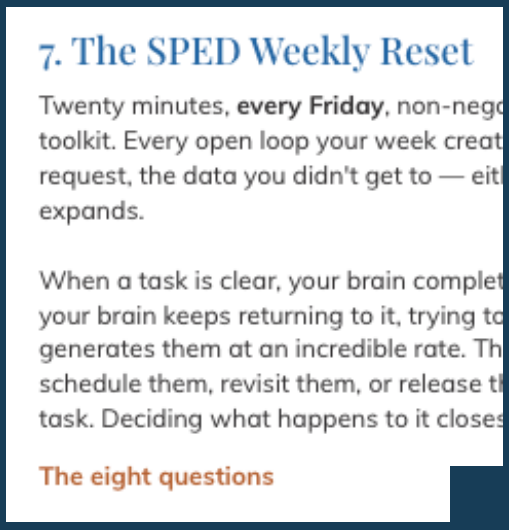
The plan is the record. The dashboard is the radar.

14

Everything works together

Guide

- setup process
- systems guidance
- decision tools
- communication + documentation support



7. The SPED Weekly Reset

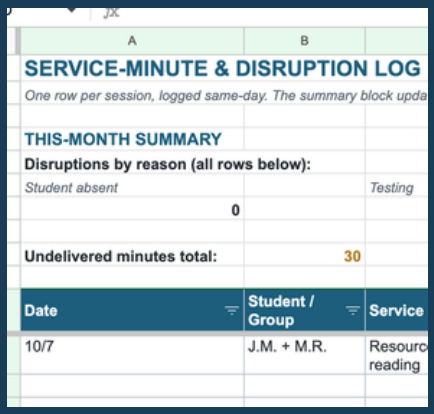
Twenty minutes, **every Friday**, non-nego
toolkit. Every open loop your week creat
request, the data you didn't get to — eit
expands.

When a task is clear, your brain complet
your brain keeps returning to it, trying to
generates them at an incredible rate. Th
schedule them, revisit them, or release t
task. Deciding what happens to it closes

The eight questions

Command Center Workbook

- caseload dashboard
- schedules
- deadlines
- progress monitoring
- logs and trackers



SERVICE-MINUTE & DISRUPTION LOG

One row per session, logged same-day. The summary block upda

THIS-MONTH SUMMARY

Disruptions by reason (all rows below):

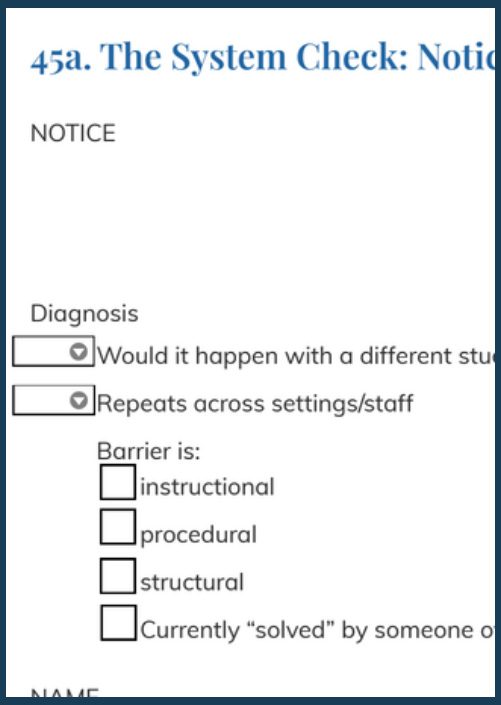
Student absent	*Testing*
0	

Undelivered minutes total: 30

Date	Student / Group	Service
10/7	J.M. + M.R.	Resourc reading

Editable Resources

- Google Docs
- templates
- forms
- tools



45a. The System Check: Notic

NOTICE

Diagnosis

☐ Would it happen with a different stu

☐ Repeats across settings/staff

Barrier is:

☐ instructional

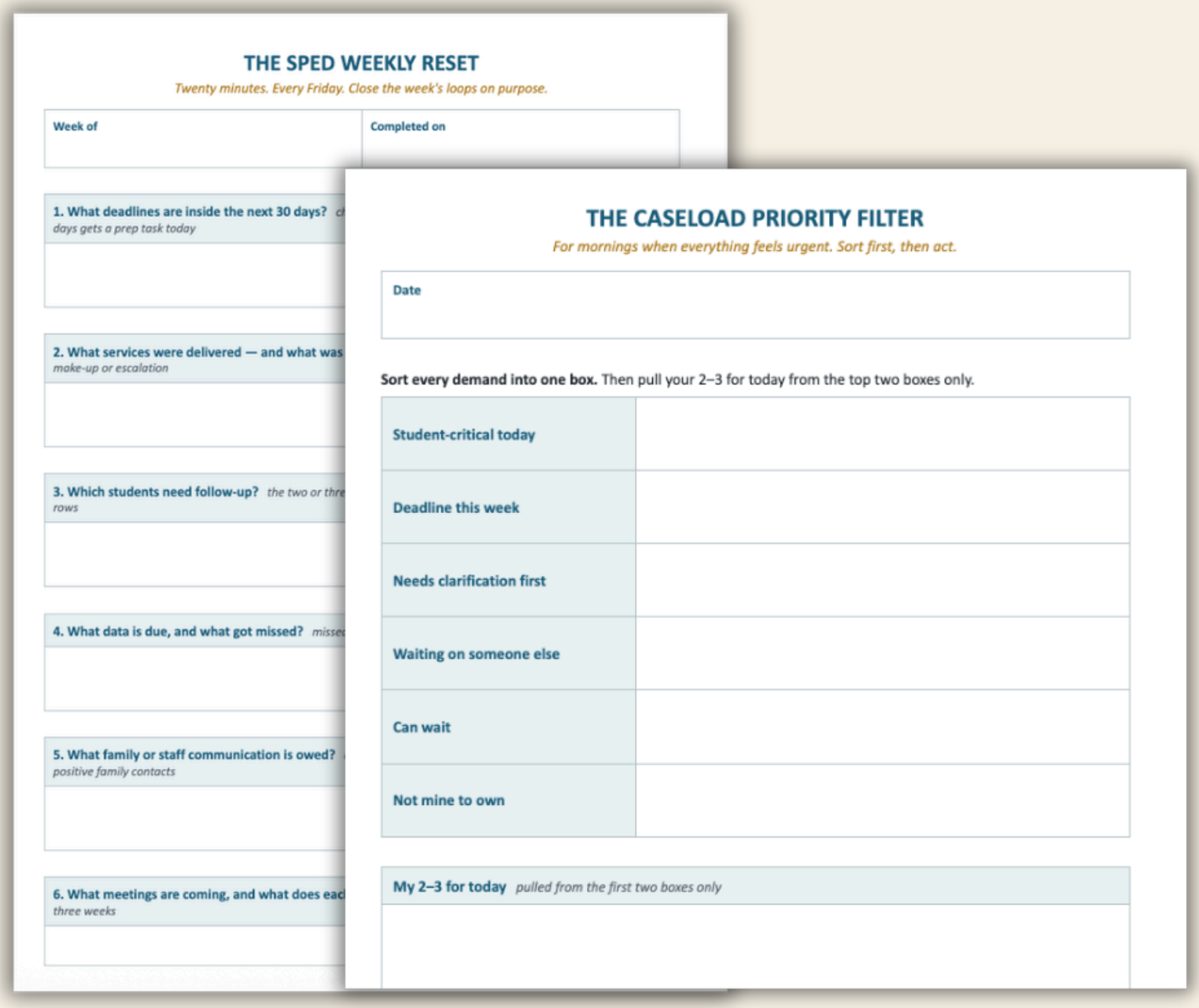
☐ procedural

☐ structural

☐ Currently "solved" by someone o

NAME

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 next 30 days? *days gets a prep task today*

2. What services were delivered — and what was *make-up or escalation*

3. Which students need follow-up? *rows*

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

5. What family or staff communication is owed? *positive family contacts*

6. What meetings are coming, and what does eac *three weeks*

THE CASELOAD PRIORITY FILTER

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

Date

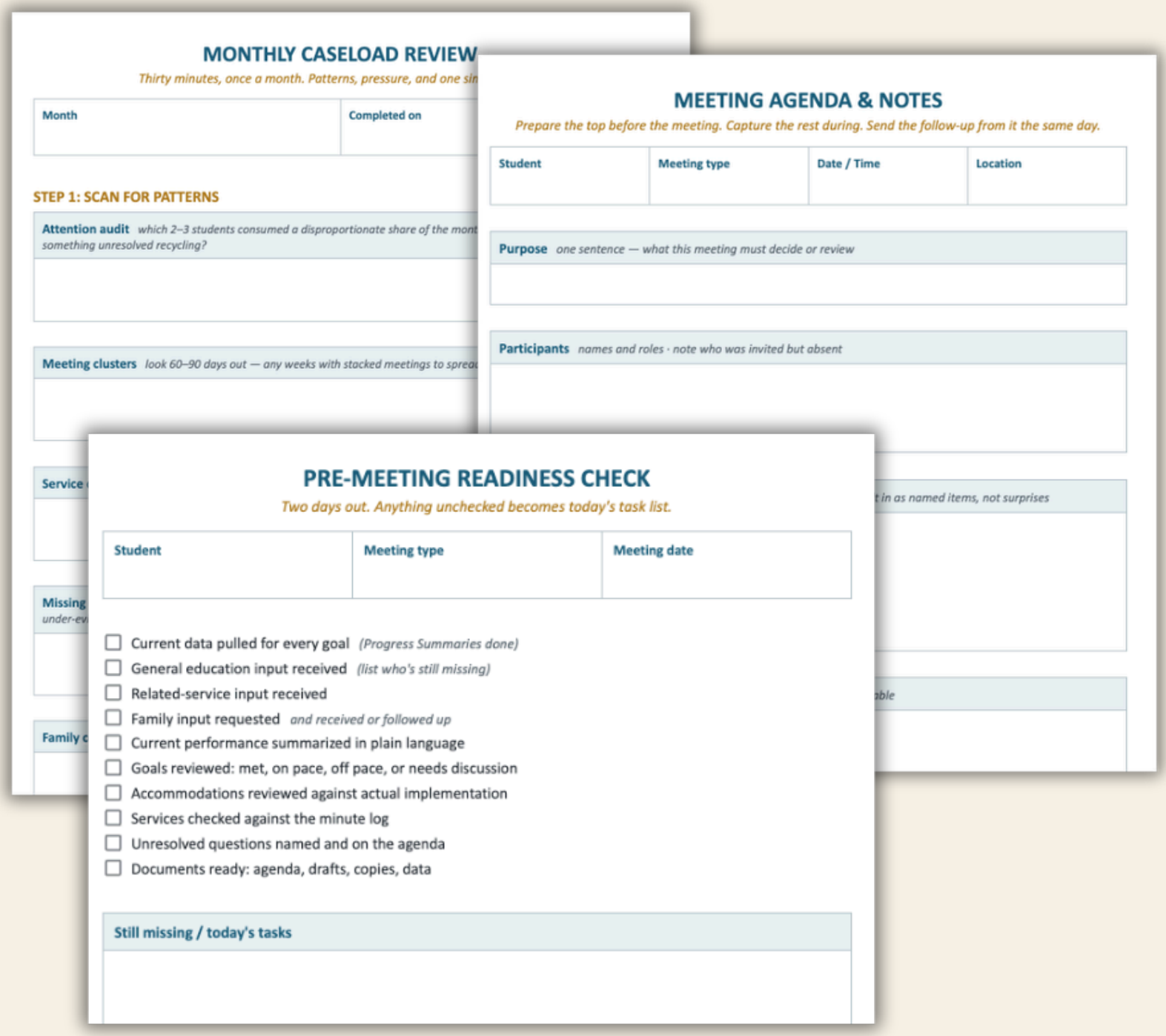
Sort every demand into one box. Then pull your 2–3 for today from the top two boxes only.

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*

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

Stay ahead of meetings, pressure points, and follow-through



MONTHLY CASELOAD REVIEW

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

Month	Completed on

STEP 1: SCAN FOR PATTERNS

Attention audit *which 2–3 students consumed a disproportionate share of the mont… something unresolved recycling?*

Meeting clusters *look 60–90 days out — any weeks with stacked meetings to sprea…*

Service …

Missing … *under-ev…*

Family c…

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

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

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

…t in as named items, not surprises

…able

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 *(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

Still missing / today's tasks

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

40 WEEKLY SPREADS TO RUN THE WEEK



August

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 wa

3. Which students need follow-up?

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

THE CASELOAD PRIORITY FILTER

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

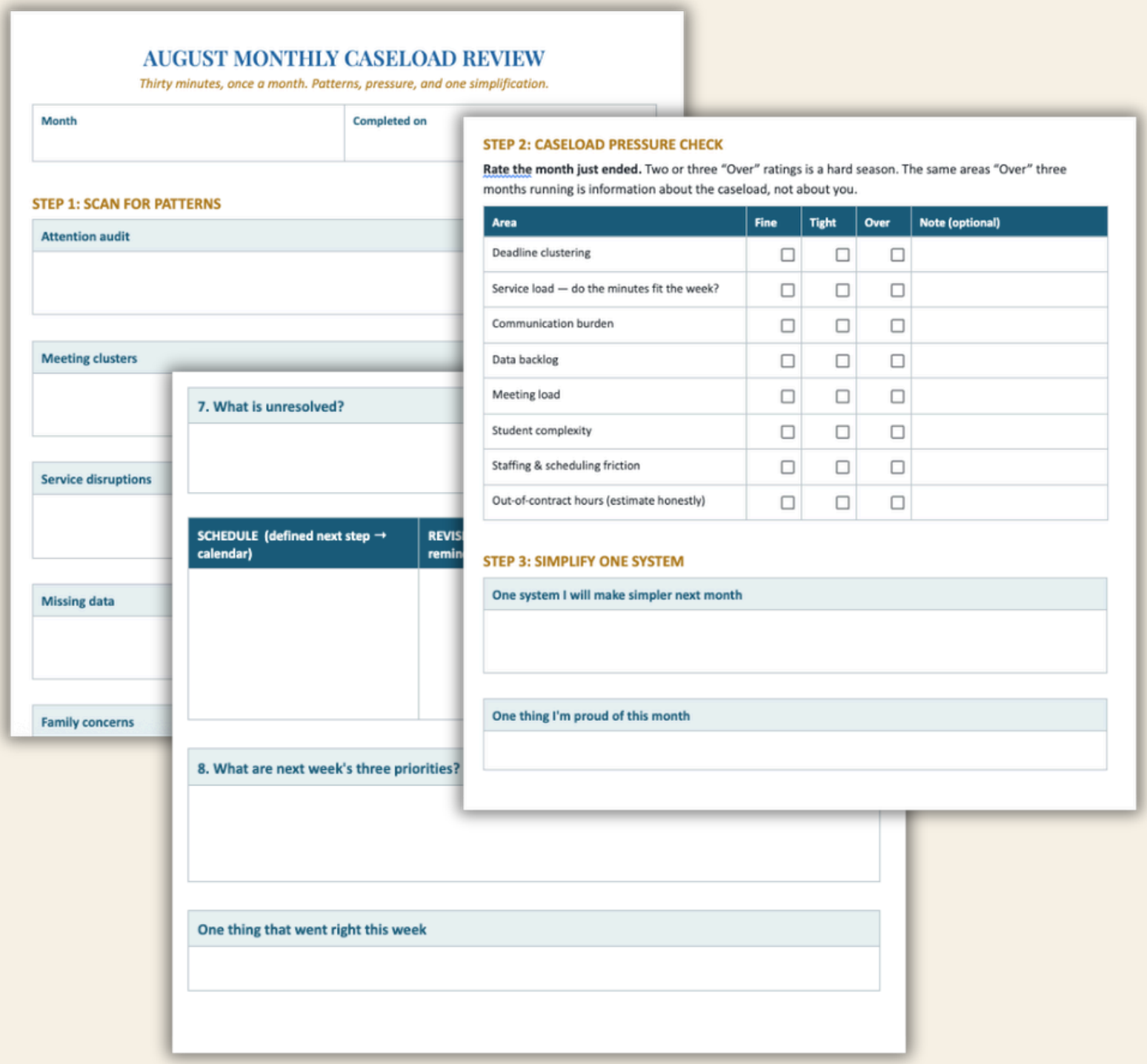
Date

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*

12 MONTHLY REVIEWS
TO STEP BACK AND ADJUST



AUGUST MONTHLY CASELOAD REVIEW

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

Month	Completed on

STEP 1: SCAN FOR PATTERNS

Attention audit

Meeting clusters

Service disruptions

Missing data

Family concerns

7. What is unresolved?

SCHEDULE (defined next step → calendar)	REVIS remin

8. What are next week's three priorities?

One thing that went right this week

STEP 2: CASELOAD PRESSURE CHECK

Rate the month just ended. Two or three "Over" ratings is a hard season. The same areas "Over" three months 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)	☐	☐	☐	

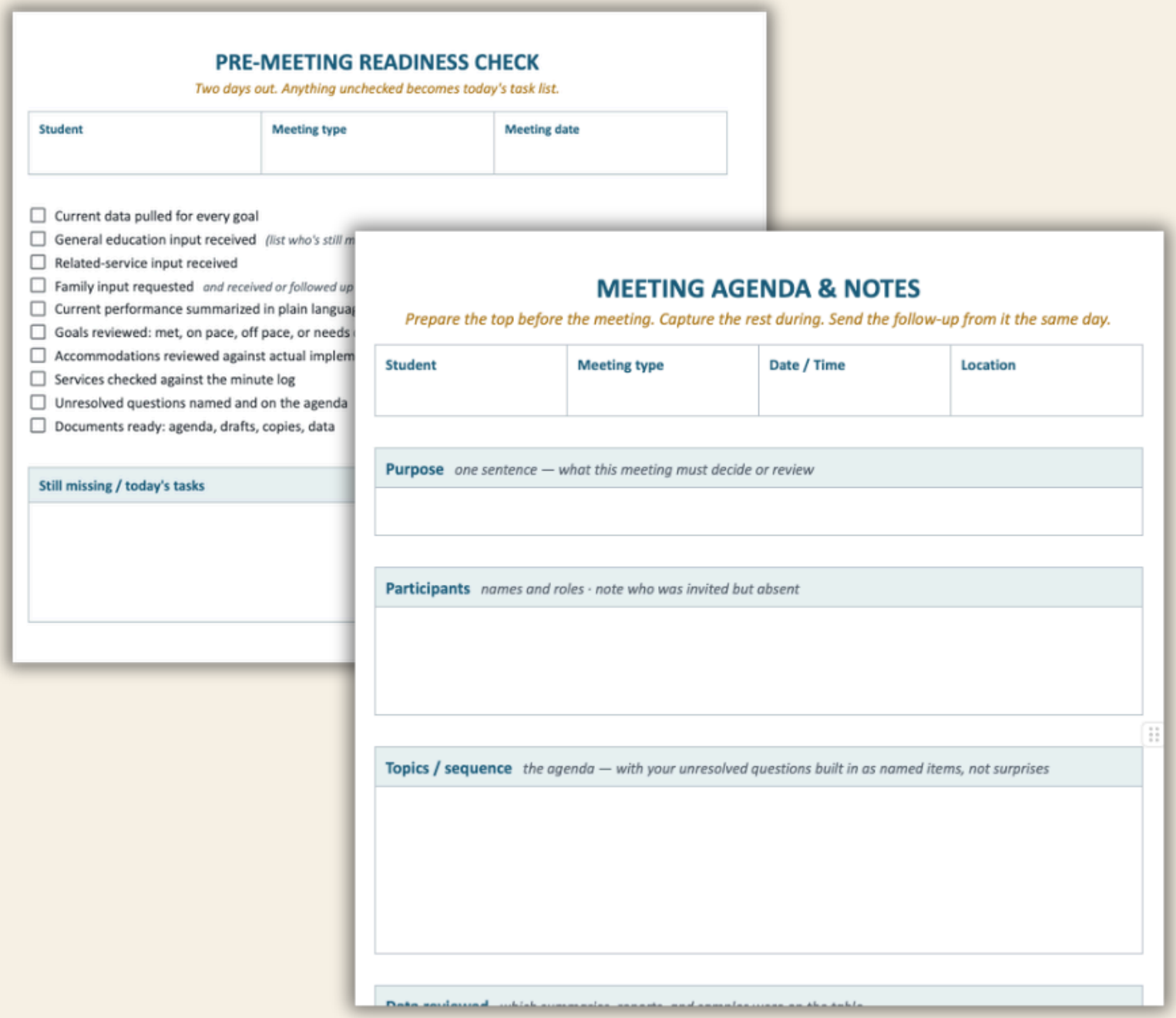
STEP 3: SIMPLIFY ONE SYSTEM

One system I will make simpler next month

One thing I'm proud of this month

Notice patterns before they become crises.

20 MEETING SPREADS TO PREPARE AND FOLLOW THROUGH



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 m*
- ☐ Related-service input received
- ☐ Family input requested *and received or followed up*
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Still missing / today's tasks

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

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

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

Topics / sequence *the agenda — with your unresolved questions built in as named items, not surprises*

Organize the information that matters before the meeting.

FROM CASELOAD SETUP TO YEARLONG FOLLOW-THROUGH

Use the Command Center to build and manage the complete system.

Use the Systems Workbook to maintain the weekly, monthly, and meeting rhythm.