

In order to complete your Case Management duties and assist with December Count requirements, please go through every student on your caseload, if you are the Primary Service Provider (Case Manager) as this is a Must Do” for Case Managers. The following steps need to take place after every IEP has been Administratively Approved. Please perform these steps for each student on your caseload.

Steps 1 and 2: Make sure you Assign Providers after every IEP has been Administratively Approved. After it is approved, your Program page will look like this:

The screenshot shows a software interface for IEP management. At the top, a card displays 'IEP - School Age (6-14)' with dates '1/25/2017 - 1/23/2018'. Below this is a 'Services' section with a link to 'Speech/Language Therapy' (dated 1/25/2017 - 1/23/2018) and a note: 'Indirect - 15 minutes monthly by No Providers selected.' To the right of the service is a 'Log' button. A red-bordered box contains the text: 'STEP 1: Please label only the 1st service. This service must be able to be performed by a Licensed Special Education Teacher or a Licensed Speech Language Pathologist.' An arrow points from this box to the 'Speech/Language Therapy' link. Further right is a goal: '1) Communication: Neveah will produce consonant blends in all word positions 90% accurately i...' with a 'Goal Met (3rd)' status and a 'View Details' button. Below the service card is a green banner: 'Pending: IEP (any)' with a 'Create' button and the text 'Pending due to Evaluation - Initial or Reevaluation ended'. At the bottom, a 'Team' section has an 'Add Team Members' button. A red-bordered box contains the text: 'Step 2: Label the Team Leader = Primary Service Provider=person responsible for the 1st service listed (Case Manager). Add any other service providers under Add Team Members'. An arrow points from this box to the 'Add Team Members' button.

**IEP - School Age (6-14)**  
1/25/2017 - 1/23/2018

**Services**

[Speech/Language Therapy](#)  
1/25/2017 - 1/23/2018

Indirect - 15 minutes monthly by No Providers selected.

**Log**

**STEP 1:** Please label only the 1st service. This service must be able to be performed by a Licensed Special Education Teacher or a Licensed Speech Language Pathologist.

**1) Communication: Neveah will produce consonant blends in all word positions 90% accurately i...**  
Goal Met (3rd)

**View Details**

**Pending: IEP (any)**  
Pending due to [Evaluation - Initial or Reevaluation](#) ended

**Create**

**Team** [Add Team Members](#)

**Step 2:** Label the Team Leader = Primary Service Provider=person responsible for the 1st service listed (Case Manager). Add any other service providers under Add Team Members

Continuation of Step 1 :

**Manage Service Providers** [Close]

--Select Provider To Add-- [Add]

[Save] [Cancel]

1. Select your name from the drop down box

2. Select Add  
If someone else is listed  
Please select remove  
next to their name

3. Please SAVE

The screenshot shows a dialog box titled "Manage Service Providers". At the top, there is a dropdown menu with "--Select Provider To Add--" and an "Add" button. Below this are "Save" and "Cancel" buttons. Three red-bordered callout boxes with green arrows point to specific elements: Box 1 points to the dropdown menu; Box 2 points to the "Add" button; Box 3 points to the "Save" button.

Step 3:

**Manage Team Members** [Close]

Below are all the people assigned to this program. You can assign team members when new items are created. Edit existing items.

**Team Lead:**  
[User Icon] Sonya Teigen

**Other Team Members:**  
*No team members currently selected*

Add Person: [Text Input]

**Primary Service Provider:**  
Sonya Teigen [Dropdown Arrow]

[Save] [Cancel]

Step 3: Select the person responsible for providing the first service listed on the Program Tab as Team Lead and then Primary Service Provider, then Add Person for each other Service Provider or IEP team member. PLEASE REMEMBER TO SAVE

The screenshot shows a dialog box titled "Manage Team Members". It contains a paragraph of text, a "Team Lead" section with a user selection (Sonya Teigen), an "Other Team Members" section with a "No team members currently selected" message, an "Add Person" text input field, and a "Primary Service Provider" dropdown menu (currently showing Sonya Teigen). At the bottom are "Save" and "Cancel" buttons. A large red-bordered callout box on the right contains the text "Step 3: Select the person responsible for providing the first service listed on the Program Tab as Team Lead and then Primary Service Provider, then Add Person for each other Service Provider or IEP team member. PLEASE REMEMBER TO SAVE". Two black arrows point from this callout box to the "Team Lead" user selection and the "Primary Service Provider" dropdown menu.

When completed correctly your Program tab should look like this:

**IEP - Transition (15+)**  
11/13/2015 - 11/11/2016

**Services** [Assign Providers](#) 🔍

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[Classroom Instruction-Direct Outside Gen Ed Class](#)  
11/13/2015 - 11/11/2016

Direct - 1990 minutes weekly by Sonya Teigen Log

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[Speech/Language Therapy](#)  
11/13/2015 - 11/11/2016

Direct - 90 minutes monthly by No Providers selected. Log

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[Speech/Language Therapy](#)  
11/13/2015 - 11/11/2016

Indirect - 15 minutes monthly by No Providers selected. Log

**Notice only the 1st Service is labeled with a Service Provider**

This is what the Team should look like under Add Team Members at the bottom of the Program Tab of each student. You may need to add and remove service providers when there are staff changes.

**Team** [Manage Team](#)

<b>Sonya Teigen</b> Team Leader , Primary Service Provider	<b>Carol Sommers</b> Speech-Language Pathologist	<b>Patricia Reitinger</b> School Based Mental Health Provider	<b>Deirdre Shearer</b> Special Education Director or Designee
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**Case Manager** **Other Service Providers on the IEP team**