



***The Case Management Process  
First Year Professional Development  
School Psychologists and Social Workers***

Office of Special Education Initiatives

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New York City Department of Education



## Key Responsibilities of the School Psychologist

- Ensure effective management of the evaluation process
- Administer timely psycho-educational assessments
- Facilitate IEP meetings
- Conduct classroom observations

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2

- The School Psychologist serves as the case manager.
- The School Psychologist may be asked to participate on the LRE, AIS, PPT, Inquiry Teams or other committees.
- School Psychologist may be asked to conduct FBAs and formulate Behavior Intervention Plans for students experiencing behavioral challenges.
- Please refer to the **sample** Case Management Checklist following this page.
- Please refer to the School Psychologist Caseload Management Plan following this page. This document is a communication tool between the School Psychologist and School Principal regarding the status of all cases open for evaluation.
- There is a sample calendar following this page to use for scheduling evaluations and reviews.

## **Key Responsibilities of the School Psychologist**

- Determine the need for psychological evaluation
- Consult with school staff, parents, and students regarding behavioral management issues and concerns
- Serve on school-level committees (LRE, AIS, PPT, Inquiry Teams)
- Other related duties

## **Key Responsibilities of the Social Worker**

- Obtain parental consent for evaluation
- Explain due process rights to parents
- Determine guardianship and obtain surrogates if needed
- Conduct Social Histories
- Conduct Social History Updates (maximum of 5 hours per week)

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4

-Social Worker may be asked to serve as a liaison between school, parent and community based organizations and resources.

-Social Worker may be asked to assist in the completion of FBAs and Behavior Intervention Plans for students experiencing behavioral challenges.

## **Key Responsibilities of the Social Worker**

- Participate in IEP meetings as appropriate (mandated for all initial cases)
- Conduct classroom observations as needed
- Provide consultative and support services to students, parents, and school personnel
- Serve on school-level committees (LRE, AIS, PPT)
- Provide intervention services, including counseling

## **Key Responsibilities of the IEP Teacher**

### **For a minimum of 5 periods per week:**

- Prepare for and attend IEP meetings of students initially referred to special education
- Conduct classroom observations
- In the event of Requested Reviews or Triennial Reviews, provide coverage for other special education teachers so that they may attend the IEP meetings for their students

## **Key Responsibilities of the IEP Teacher**

**The balance of the schedule will be programmed at the discretion of the Principal in the following ways:**

- Instruct students with disabilities (Push-In and/or Push-Out SETSS, CTT, part-time self-contained classes)
- Instruct identified SE and GE students at risk of academic failure
- Administer curriculum-based assessments for at-risk GE students
- Participate in PPT/Instructional Support Committees
- Other related duties

## **Key Responsibilities of Clerical/Family Workers**

- Browse and enter student-specific data
- Conduct administrative tasks such as: completing forms, mailing notices and forms to parents, duplicating records and reports, filing, scheduling assessments and IEP meetings, responding to inquiries
- Prepare all documentation for tracking case completion and assisting in case management
- Reconcile computerized reports
- Perform general clerical and office duties

## **Key Responsibilities of Clerical/Family Workers**

- Create and maintain confidential student files, including filing all completed assessment reports, due process notices and letters
- Retrieve and transmit student records and files
- Contact parents as needed
- Open all re-evaluations and Triennials
- Other related duties