

Case Manager Checklist for SAT Referrals

As the case manager assigned to this case, you are the primary colleague and support throughout the process. In addition to this role, the following are responsibilities of the case manager:

Prior to the initial SAT meeting:

- Meet with the teacher at least 1 week prior to the SAT meeting and complete the following tasks:
 - Review the referral form with the purpose of becoming familiar with the student's case. Pinpoint the problem.
 - Conduct 3-5 observations (have other SAT members assist as needed).
 - Research some recommendations to bring to the meeting.

After the initial meeting:

- Within a week after the initial meeting, meet with the teacher to determine the following:
 - Whether the teacher has begun implementing the intervention and if not, problem solve with teacher to find out why. (ex. - assist with finding proper resources and/or inform coordinator of issue)
 - Whether the teacher has any questions regarding the intervention procedures or data collection procedures
 - Whether the teacher needs any additional resources to implement the intervention and collect necessary data
 - Whether the teacher is still satisfied with the intervention designed and if not, problem solve with teacher to minimally modify intervention and/or inform coordinator of issue. If necessary a quick team meeting will be held the Monday following the date the coordinator was contacted.
- Check with the teacher approximately every week for the duration of the intervention to determine:
 - Whether the intervention is being implemented as described during the SAT meeting
 - Whether teacher is tracking accurate implementation