

Back-to-School Caseload Checklist

Everything to set up in the first 2 weeks — without losing your mind.

Print this. Put it on your desk. Cross things off. Designed for school SLPs running 40–70 students with overlapping triennials, new referrals, and last year's loose ends.

Week Before School Starts

- Confirm caseload roster against district SEIS / IEP system
- Flag every IEP due in the first 6 weeks (annual + triennial)
- Identify students new to your caseload — pull last year's IEP and progress notes
- Verify service minutes match IEPs (push-in vs pull-out, group vs individual)
- Set up therapy schedule template; leave a 30-min weekly buffer for evals
- Reset your therapy room: materials, AAC charging, visuals, sanitizer
- Send introduction email to teachers with your schedule and how to refer

First Week of School

- Hand-deliver schedule to each classroom teacher; confirm pull-out times
- Meet new students in their classroom before pulling them
- Send parent introduction letter (English + home language)
- Begin collecting baseline data on any student with a goal due in the next 30 days
- Triage referrals from last spring that didn't get evaluated
- Confirm interpreter availability for upcoming IEPs

First Month

- Complete all annual IEPs due in September
- Start triennial evals — testing window opens
- Hold transition meeting with previous SLP for any high-need transfer student
- Update goal tracking spreadsheet / progress monitoring tool
- Calibrate with your speech assistant or co-SLP on data conventions

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- Submit Medicaid billing for first month (if applicable)

Documentation You Should Have on File

- Current signed IEP for every student on your caseload
- Most recent triennial evaluation report
- Audiogram (within 1 year) for any student with articulation, language, or voice eligibility
- Vision screening result (within 1 year)
- Parent consent to evaluate, for any pending assessments
- Interpreter request form, if applicable

Red Flags — Address This Week

- Any student without a current signed IEP
- Any triennial overdue or due within 30 days
- Any annual overdue
- Any student receiving services without a current goal in that area
- Any new transfer student without records received

Your Sanity Checklist

- Block one 'documentation hour' per day on your calendar
- Eat lunch away from your desk at least 3 days per week
- Keep a 'parking lot' notebook for ideas, parent questions, follow-ups
- Identify one colleague to text when the day goes sideways
- End each Friday with a 10-minute 'next week prep' so Monday is calm