

RECORDS ASSISTANT DUTIES

The following are general duties of what your paperwork assistant can do to help your team

Case Managers–Set in myIDEA, keep them updated

Organize Files–Put in Davis District order, check for completeness and inform teachers of corrections that need to be made. Avoid making the corrections yourselves.

Current Information Sheets–Print and place in file (shred the previous one,) add Record of Access if necessary.

Progress Reports–Print or email a copy to the parents, place a hard copy in the student's file.

Calendaring –Calendar IEPs and Eligibilities before due dates, utilizing the PLANNER tool on TEAMS, allowing for three attempts if necessary. Set up appointments and send Notices of Meeting to parent and track dates. Make follow-up phone calls and anecdotal response. Avoid recording emotions and opinions or discussing issues with the parent not directly related to the purpose of the phone call on the anecdotal.

Data Review–Remind teachers to complete a Data Review within 90 days of Eligibility due date. Communicate in PLANNER.

Consent to Evaluate – (Secondary Schools only) Send to parent and note the date consent is returned. Add to PLANNER in notes.

Move-in's – (Secondary Schools only) Content of the goals and service time and FINALIZING is the ultimate responsibility of the case manager. Add student to PLANNER.

Counts–October 1st, December 1st, and July 1st. Verify that the SCRAM minutes, service time on the IEP, and class schedule all match. Inform case manager if there is a discrepancy. Contact TCM if help is needed.

Pending–Run reports and finalize under case manager's direction.

File Tracking–Set up and maintain tracking sheets for files coming in and out of the school as well as in and out of the district. Assist with file security (File Cabinet Access List). Sixth and ninth grade transition –prepare file transfer list and file a copy. Check in files coming from feeder school against transfer list. Prepare and clearly label files that are to be shredded or archived according to the pertinent year.

TRAININGS–Attend mandatory trainings.