**SAP Case Manager Checklist**

This checklist documents necessary tasks for each SAP referral. Some tasks may be delegated to other team members.

**Referral Phase**

* Written referral received and discussed at SAP team meeting
* SAP Team Case Manager assigned

**Data Collection Phase**

* Send behavior checklists to appropriate school staff members (follow school entity policy regarding when parent/guardian consent is obtained)
* Compile additional school data
  + Academic
  + Attendance
  + Disciplinary
  + Nurse
  + Counselor
  + Administrator
* Call the parent/guardian (see [Initial Parent Conversation Checklist](https://pnsas.org/Portals/0/About%20SAP/SAP%20Teams/Initial%20Parent%20Conversation%20Checklist.pdf?ver=9Ww5-0Eg7Wy8zMIou41UzQ%3d%3d) for more details) to explain SAP and build rapport
* Obtain written parent/guardian consent for SAP – *if consent is not obtained, the SAP process is discontinued and other school services may be recommended*
* Have conversation with the student to explain SAP and build rapport (see [Student Conversation Checklist](https://pnsas.org/Portals/0/About%20SAP/SAP%20Teams/Initial%20Student%20Conversation%20Checklist.pdf?ver=8NiJPjxioNeoEWwKFPu5Aw%3d%3d) for more details)
* Compile and summarize all checklists and other data for SAP team
* Review and summarize data – discuss at a SAP team meeting

**Action Planning Phase**

* Use data to determine appropriate school and community recommendations
  + Consult with the SAP liaison, if available, to determine the need for a screening, assessment, and any applicable school or community resources
* Involve the student and family in the development of a SAP Action Plan

**Follow-Up Phase**

* Complete check-ins and gather data following timeframes in the SAP Action Plan
* Involve the student and family in follow-up to make any necessary changes to the SAP Action Plan
* Continue monitoring the SAP Action Plan and review progress towards student goal(s) at SAP team meetings and with the student and family
* Use progress towards goals to determine when to close the case
* Complete PDE4092 form