



BACK TO SCHOOL CHECKLIST: CASELOAD + SCHEDULING

#	GET YOUR CASELOAD ORGANIZED, BUILD YOUR SCHEDULE, AND LEAVE ROOM TO BREATHE.	DONE
1	Confirm your caseload: Check with your registrar, special education coordinator or district rostering system for accurate student schedules and transfer info. Getting this early helps you plan ahead and avoid last-minute surprises.	
2	Import students into your Kit caseload: Add students individually or in bulk to keep IEP info, goals, and contact details in one place—no more jumping between spreadsheets.	
3	Review service minutes and assignments: Compare your caseload list to IEP service logs. Flag any inconsistencies or gaps now—before your calendar fills up.	
4	Coordinate with teachers and providers: If in-person meetings aren't feasible, use email, a shared Google Sheet, or a quick Google Form to collect teacher availability and preferences.	
5	Build your schedule: Use a digital calendar like Kit to map out your week or rotation. Group students by location or service type to streamline transitions.	
6	Add non-instructional events: Include IEP meetings, assessments, and planning time in your calendar. Seeing the full picture helps you plan realistically.	
7	Leave flex time: Build in buffer blocks for makeups, walk-ins, or unexpected changes. Even 15 minutes per day can make your week more manageable.	
8	Share your schedule with staff: Distribute printed copies, email them, or share via Kit guest access. Add a friendly note—it helps set a collaborative tone.	
9	Set up auto-reminders: Use Gmail Scheduler, Boomerang, or Outlook to send recurring reminders to teachers about SDI or session times.	
10	Create your To-Do list: Whether you're jotting it in a notebook or logging it in a digital tool like Kit, get everything out of your head—from 'confirm OT consults' to 'buy fidgets'.	



BACK TO SCHOOL CHECKLIST: TEAM COLLABORATION & COMMUNICATION

#	CONNECT WITH YOUR TEAM, FAMILIES, AND STUDENTS— DIGITALLY OR IN PERSON.	DONE
11	Use Task Templates: A reusable checklist for IEPs, evaluations, or Medicaid saves time and keeps you on track—especially when your brain’s at capacity. There are templates you can access for free inside of Kit’s To-Do feature.	
12	Organize your inbox: Create student folders or Gmail filters to tag messages. If you’re using AI tools (like Superhuman or Gmail’s Smart Reply), let them speed up repetitive responses.	
13	Write a “Meet the Teacher/Therapist” letter: Use Canva or ChatGPT to draft an intro about your role and how families can reach you. Send home in backpacks, email, or post to your school site.	
14	Set expectations for goal tracking: Mention that you’re using digital tools to collect data, generate visuals, and document progress to support shared decision-making and ease of export whenever a team member needs info.	
15	Build rapport with your team: Start with one simple message—“Let me know how I can support your students this year.” Even a short email or hallway hello goes a long way.	
16	Create digital communication logs: Use Google Sheets or a running log in Kit to document contacts with families and staff. AI summaries (via tools like Otter or Fireflies) can help you log calls automatically.	
17	Prep visual supports: Attach visuals, routines, or accommodations to Kit events. You can also store links to social stories, reward menus, or tech tools in one place.	
18	Send student surveys or intro activities: Use Google Forms, Slides, or Canva to gather student interests and preferences. Even a quick “About Me” form builds connection from day one.	
19	Organize shared drive access: Set up a digital folder for IEPs, forms, or collaboration tools—whether you use Google Drive, OneDrive, or something else. Share access with your team for smooth workflows.	
20	Celebrate your small wins: Check off a few tasks, take a deep breath, and acknowledge what’s already working. Progress beats perfection—always.	



BACK TO SCHOOL CHECKLIST: INSTRUCTION, DATA, AND AI TOOLS

#	START INSTRUCTION STRONG AND STREAMLINE YOUR DATA WITH DIGITAL + AI SUPPORT	DONE
21	Add student goals to Kit: Link IEP goals to each student in the Instruction tab. This keeps planning, tracking, and documentation all in one place.	
22	Plan your first sessions in Kit: Create a “Welcome Back” lesson with activities that build trust and set expectations. Include goals, reinforcers, and routines students can count on.	
23	Use AI to help plan: Ask ChatGPT, MagicSchool.ai, or Diffit for lesson ideas, modifications, or visual supports based on your student goals. AI helps you start faster, not from scratch.	
24	Collect baseline data: Use Kit’s instruction feature to record scores, cues, and supports during your first sessions. It’s the easiest way to document ESY trends or early growth.	
25	Log qualitative notes: Capture observations like confidence, behavior, or sensory needs in Kit. These notes add context and show the full story behind your numbers.	
26	Check your Agenda daily: Your Kit Agenda shows who you’re seeing and what’s coming up. Reviewing it in the morning gives you clarity before the day takes off.	
27	Run your Attendance Report: Kit’s built-in Attendance Report helps you confirm that service times are being met. It also catches missed sessions early so you can plan makeups.	
28	Prep for billing now: Use “Copy for Billing” in Kit to generate Medicaid documentation from your instruction logs. Logging daily or weekly saves hours—and headaches—later.	
29	Batch and automate where possible: Write common emails in batches, use scheduling tools, or connect Gmail to Google Sheets with Zapier. Delegate repeatable tasks to tech where it makes sense.	
30	Reflect and adjust: What’s working? What needs tweaking? Block 20 minutes to reflect at the end of week one and update your To-Do list. Kit will evolve with you.	