User's Guide Contents

General System Information

Saving Data

Because the e-IEP PRO® is a web-based system, saving changes made to records is **VERY IMPORTANT**. The data entry forms that display the data are in an html and/or asp format, and are "stateless". In other words, when the data on the page is displayed, it reads the data from the web server and displays it to the user's browser. The web server, where all of the data is stored, does not know any changes have been made unless the user tells the system to save the updated data. During the Save Process, the browser sends the data changes to the server to be written to the database. Every screen within the system has a **Save** button (i.e., Save) that allows the current screen's data to be saved to the e-IEP PRO database.

Getting Help

A **Help** button (i.e., Help) is located on every screen throughout the system in the top right-hand corner (Navigation Toolbar). After clicking the **Help** button, a new browser window will open displaying context-sensitive help.

Clicking/Selecting

Throughout the User's Reference Guide and system's Help text, the words "Click" or "Select" are used. Both of these refer to the action of single-clicking (single-left-clicking on a PC) with the user's mouse on the respective field, button, or link on the screen.

Adding, Modifying, and Deleting Records from "Bank" Boxes

One format for adding different types of field data to a student's file within the e-IEP PRO is a "Bank". Banks contain a list of pre-defined values that can be selected by a user to be added to a Student's record. Examples of types of fields that use Banks in the e-IEP PRO are goals, criteria, and assessment procedures (where the user selects specific and multiple goals, criteria, or assessment procedures from a Bank to add to the student record).

The following descriptions use the Goals field as an example to demonstrate how to use a Bank within the software:

- To **Add** goals to the student's record, click inside of the Goals Bank list box to highlight/select the desired goal(s) to add. Click the **Add Selected Goals** button at the bottom of the screen to add the highlighted item to the student's record. The goals associated with the student/IEP will be located in a list directly above the Goals Bank.

- To **Delete** Goals, select the Trash Can icon next to the Goal(s) desired to be deleted. The screen will refresh and the desired goal will be removed.

- To **Save Changes**, click the **Save Changes** button.

- To **Add Multiple Goals** all at once hold down the Ctrl key on the keyboard and select (click on) each desired goal from the Bank. Then click the **Add Selected Goals** button and all of the selected (i.e., highlighted) goals will be added. (**NOTE:** Within some Bank boxes, such as those in Prior Written Notice, multiple values cannot be entered at one time.)

Entering Data

Once the cursor is clicked into a field, the Tab key can be used to move from field to field. Type text into the text fields.

In fields where there is a pull-down selector, click on the triangle(s) on the right side of the field in order to display the selection options. Or, if the field is selected (i.e. the cursor is in/on the field), use the up and down arrow keys to move between selection options. A third option, if the field is selected, is to type the first letter of the desired item in the list; the first item that contains the letter typed as the first letter will be displayed. The up and down arrow keys can then be used to navigate to the desired item.

To enter dates into a field, click on the calendar icon located to the right of the date field. Select the desired date on the calendar by single-left clicking. The date will display in the field. If you manually type in the date, the system will format the year, etc.

Note(s):

The system does not automatically format phone numbers. The phone number format desired to be printed must be entered in the text boxes.

Spell Checking

Wherever spell checking of a memo field is available, a button labeled **Check Spelling** will be located near the field (usually underneath it). To spell check that individual field, single-left click the **Check Spelling** button. The Spell Check box will display with any suggestions for the misspelled words.

To **Ignore** the misspelled word or suggestions the box offers, click the **Ignore** or **Ignore All** button located on the right side of the Spell Check display box.

To **Change** the misspelled word to one of the suggestions offered, first highlight the desired suggestion to change the misspelled word to the one on the left side of the Spell Check box, and then click the **Change** or **Change All** button located on the right side of the Spell Check display box.

To **Change** the misspelled word to something that is not offered in the suggestion list, click in the field labeled **Change To** located near the top of the Spell Check dialog box. You can type in the word to which you would like to change the misspelled word then click the **Change** or **Change All** button.

To **Finish** or **Cancel** spell checking, click the **Done** button or the **Cancel** button located on the right side of the Spell Check display box.

When the spell checker is finished, a dialog box will display that says “Spell Check Complete.”

NOTE: The spell checking features spell checks for English (US) and Spanish words.

Logging Into the e-IEP PRO

Logging Into the System

The e-IEP PRO is located at **http://www.e-ieppro.com/<your site code>** and **http://www.e-ieppro.net/<your site code>** (where <your site code> will be provided by the User Support team or your Primary Contact). An alternate address should be used if you are having trouble accessing the above address OR you are **using a MAC.** Currently, alternate addresses include (where # is a number to be provided by the User Support team or your Primary Contact): **https://www.e-ieppro#.com/<your site code>.**

To log in, follow these steps:

1. From the e-IEP PRO Home Page, select the "CLICK HERE TO LOG INTO THE e-IEP PRO® " link.

2. Enter your unique User Name, User Password, Group, and Group Password. Select the **OK** button. **NOTE:** The individual group passwords have been changed with the release of Version 8.0. Please contact your Primary Contact(s) to obtain the new password.

3. To change to a lower (e.g., slower) connection speed ***in order to use the system at home***, single-left-click on the circle labeled **Low.**

4. Single-left click the **Enter** button or press the Enter key on the keyboard to verify the User Name and Password and view the e-IEP PRO Main Menu.

To **Exit the application**: Simply close your browser. (Use the Terminate button in the top right-hand corner of the window).

Switching Between Login Groups / Quick Login Feature

Once an Administrator user has assigned a user's login account to more than one login group, the user can log in using any valid group account and corresponding group password. Specifically, users can toggle between their assigned login groups by completing the following steps:

1. Select the hyperlink group code field. **NOTE:** If a user is assigned to more than one group, the Group Code displayed at the top of the main menu (to the right of the Student Name field) will be presented as a hyperlink. If the group code is not presented as a hyperlink, the user is either only assigned to the current group or the user is an ADMINISTATOR user.

2. From the CHANGE TO NEW GROUP/SCHOOL CODE screen, select the desired new group. **NOTE**: The screen will flash and the selected group code will be displayed in red next to the field labeled "CURRENT GROUP/SCHOOL CODE".

3. Select the "RETURN TO MAIN MENU" link.

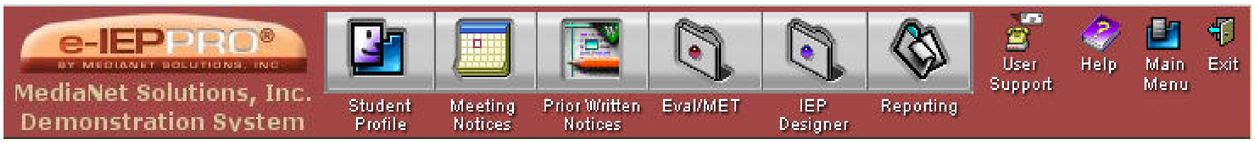
System Requirements

The recommended browser is Mozilla Firefox 3.0 or Internet Explorer 5.5 (or higher) on a PC and Internet Explorer 5.1.7 on a MAC running OS9 and Internet Explorer 5.2.3 on a MAC running OS10, or Firefox 3.0 (or greater) on a MAC running OS10. Adobe Acrobat Reader 5.0 (or higher) is also recommended to run certain features within the system. Links to download free Adobe Acrobat Reader are located throughout the system.

System Navigation

Navigation Toolbar

The Navigation Toolbar is located at the top of the screen. It contains buttons/icons to navigate to the Student Profile, Meeting Notices, Prior Written Notices, IEP Designer, and Reporting Modules within the e-IEP PRO system. **NOTE:** This menu is also referred to as the ***Quick-Click menu***. Other icons located on this toolbar include an icon to: receive **User Support**, **Help** for the specific page, link to the **Main Menu**, and **Exit** the system. See more information about Module navigation under the Main Menu section below. ***NOTE: This toolbar should be used to navigate between screens within the e-IEP PRO software.***



Features Toolbar

The Features Toolbar buttons provide the following functionality:

(1)  — Users **MUST click the Save button in order to Save any changes** made to a record. If the **Save** button is not selected prior to moving to another screen, the data that has been added/modified will be lost.

(2)  — To print a report of the respective record (Student Profiles, Conference Summaries, Meeting Notice, Prior Written Notice, Evaluation, or IEP). A report format or a report selection screen will be displayed.

(3)  — Student Profile Module only. Adds a new student record. **NOTE:** This option can be configured to be limited to ADMINISRATOR use only.

(4)  — Will mark the record currently displayed for deletion. **NOTES:** (1) This feature is only available to ADMINISTRATOR users; (2) Deleted records will be purged periodically.

(5)  — Allows the user to navigate back to the module's selection screen.

Other buttons may be available based upon the user's location within the system.

Saving Data

Because the e-IEP PRO is a web-based system, saving changes made to the records is **VERY IMPORTANT**. The data entry forms that display the record's data are displayed in an html and/or asp format, which means they are "stateless". In other words, when the data on the page is displayed, it reads the data from the web server and displays it to the user's browser. The web server, where all of the record's data is stored, does not know any changes have been made unless the user tells the system to save the updated data. During the Save Process, the browser sends the data changes to the server to be written to the database. Every screen within the system has a **Save** button (i.e.,) that allows the current screen's data to be saved to the e-IEP PRO database.

Deleting a Student Record (ADMINISTRATOR Users Only)

To mark a student record for deletion, follow these steps:

1. From the Main Menu, click to enter the Student Profile Modules.

2. On the Student Profile Features Toolbar, click the **Delete** (i.e.,) button. **NOTES:** (1) This feature is only available to ADMINISTRATOR users; (2) Deleted records will be purged periodically,

3. A confirmation message will display to confirm that the record is desired to be deleted. Click OK or Cancel. If OK, the entire student record will be marked for deletion.

Adding a New Student Record (May be limited to only ADMINISTRATOR Users)

To add a new student record, follow these steps:

1. From the Main Menu, select the **Student Profile** button.

2. Select the **Add** button (i.e.,) from the Features Toolbar.

3. Enter the Student's Name - Last Name, First Name.

4. Enter the Student's ID number. (**NOTE**: this must be a unique number.)

5. Click the **Add New Student** button to add the student. The Student Profile screen will then be displayed to enter the remaining data for the student.

NOTE: The Group Code cannot be changed when adding a record.

To return to the Student Profile screen, click the button labeled **Profile** located in the Navigation Toolbar in the upper right-hand corner of the screen.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Printing a Report

To **Print / Preview** a report, click the **Print** button (i.e.,) on the Features Toolbar (within Student Profiles, Conference Summary, Meeting Notice, Prior Written Notice, Evaluations/MET, or IEP Modules) or click the Printer icon (i.e.,) on the Selection Summary screen for each of the modules, for the individual report desired to be printed.

The student's report will be viewed in an html web page. To print the report, click the **Print** button on the browser's toolbar, or use the File menu, and select the Print option on the browser's menubar.

Meeting Notices and Prior Written Notices can be printed in their Spanish translations by clicking on the respective printer icon on the Selection Summary screen for the respective module.

Formatting the Page

Depending on the settings of the browser used to print the report, several different formats may print on the report's header and footer (e.g., the URL in the footer, date, page numbers, etc.). To change what is printed go to the File menu on the browser's menubar, and then to Page Setup.

Set Margins to:
Left 0.25 / Right 0.25
Top 0.25 / Bottom 0.25
Orientation to:
Portrait
Set Footer to:
&w &b Page: &p of &P

Under the Headers/Footers section in the middle of the Page Setup dialog box, modify (add/delete) the print codes to print in the desired format. The print codes are defined as follows:

Print Code:	**Definition:**
&w	Window title
&u	Page address (URL)
&d	Date in short format (as specified by Regional Settings in Control Panel)
&D	Date in long format (as specified by Regional Settings in Control Panel)
&t	Time in the format specified by Regional Settings in Control Panel
&T	Time in 24-hour format
&p	Current page number
&P	Total number of pages
&&	A single ampersand (&)
&b	The text immediately following these characters as centered
&b&b	The text immediately following the first "&b" as centered, and the text following the second "&b" as right-justified

Saving the Report

To **Save** the report to the computer's hard drive, go to the File menu choice on the browser's menubar and select the **Save As** option. Using the Browse dialog box that displays, navigate to the directory where the report should be saved. Modify the report title in the File_Name field. Click the **Save** button. **NOTE:** The report must be saved as an ".htm(l)" file type in order to format properly. The file can then be opened using Internet Explorer (to view or print) or a word processing software package (e.g., Word, WordPerfect) to modify the text and print.

A better method is saving the file to an **Adobe PDF** file. To accomplish this, we recommend that you use PrimoPDF® (free software). It's what the e-IEP PRO staff use to create PDF versions of the printed documents where a user can encrypt and password protect the files. It installs as a standard printer and users can easily print forms directly to PDFs using this free utility. Since PrimoPDF® allows password protecting and encryption, using PrimoPDF® to create PDF versions of the printed forms will allow a user to e-mail the printed documents (Mtg Notices, IEPs, METs, etc.) to parents and others in a HIPAA and FERPA compliant manner. You can download Primo PDF at http://www.primopdf.com/.

Exiting the Report

To **Exit** the report, click the **Back** button on your browser's toolbar.

Record Header

Within each module and on each screen, there is a Record Header that is located below the Features Toolbar, which contains the Group Code and Student ID. The Header also contains the Date Last Updated (of the record) and the User who made the last update.

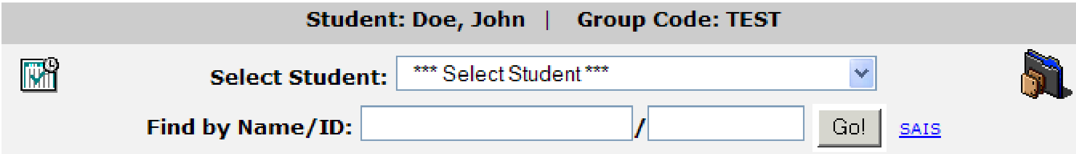
Screen/Form Navigation

The Screen/Form Navigation Toolbar is located immediately below the Features Toolbar in the Record Header (see graphic above). To navigate between different screens or forms in the respective module single-left click on the desired title/hyperlink. The desired screen or form will display.

Main Menu

Selecting a Student

To find a record or navigate to a student's record, use the Student Selection fields on the Main Menu screen.



You can find a student by one of four methods:

(1) Select the drop-down box, and then scroll and select the desired student name. The screen will refresh and the selected student name will display in the header bar,

(2) Enter a student's name (or any part of the student's name) in the field to the right of the label "Find by Name/ID" on the Main Menu. Select the **Go** button located to the right of the field. The student's name will display in the header bar, or if more than one match is found, a list of matching student records will be displayed. Single-left click on the name/hyperlink to select the desired student and return to the Main Menu. ***NOTE:*** *If both a student name and ID are entered in the corresponding search fields, the search will be completed on the student's name field,*

(3) Enter a student's ID (or any part of the student's ID) in the second field to the right of the label "Find by Name/ID" (just to the left of the **Go** button) on the Main Menu. Select the **Go** button located to the right of the field. The student's name will display in the header bar, or if more than one match is found, a list of matching student records will be displayed. Single-left click on the name/hyperlink to select the desired student and return to the Main Menu. ***NOTE:*** *If both a student name and ID are entered in the corresponding search fields, the search will be completed on the student's name field, OR*

(4) Enter a student's date of birth in the second field to the right of the label "Find by Name/ID" (just to the left of the **Go** button) on the Main Menu. Select the **Go** button located to the right of the field. If the system recognizes the value is a date, it will automatically search by the DOB field per the entered value. ***NOTE:*** *Enter the DOB in "mm/dd/ccyy" format.*

The selected record is the active record for the system, so when accessing modules within the system (e.g., Conference Summary or Student Profile), the information for that student will be displayed.

Module Navigation

Navigation between modules within the system can be completed in two ways from the Main Menu.

(1) The Navigation Toolbar - The Navigation Toolbar is located at the top of the screen. It contains the buttons/icons to navigate to the Student Profile, Meeting Notices, Prior Written Notices, IEP Designer, Eval/MET and Reporting Modules within the e-IEP PRO system. Other icons located on this toolbar include an icon to: contact **User Support**, **Help** for the specific page, link to the **Main Menu**, and **Exit** the system. See the Module summaries under #2 below for a description of each module.

The Navigation Toolbar will remain at the top of the screen as you navigate to each page within the system. It is a "quick link" to navigate to different modules with minimal clicking.

(2) Module Navigation buttons - Single-left click on any of the maroon menu buttons located on the screen to perform the labeled action. **NOTE:** If the buttons appear in **gray**, the student record has been deleted. Deleted records information cannot be accessed.

Student Profile

Select this option if you need to add a new student or edit and view the student's demographic or attendance data.

Conference Summaries

Select this option to create, view, edit, or print the student's Conference Summaries.

Referrals

Select this option to create, view, or edit the student's Referral data and editable Adobe pdf forms (such as RTI forms, Student Study Referral Sheet & Background History form).

Meeting Notices

Select this option to create, view, edit, or print the student's Meeting Notices.

Prior Written Notices

Select this option to create, view, edit, or print the student's Prior Written Notices.

Supporting Documentation

Select this option to create/upload, view, edit, or print the student's supporting documents to be attached to the student's record (i.e., Word documents, Excel Spreadsheets, etc.).

Evaluations/MET

Select this option to create, view, edit, or print the student's Evaluations/MET reports and editable Adobe pdf forms (such as Parent Input, Eligibility forms, etc.).

IEP Designer

Select this option to create, view, edit, or print a student's IEP.

Reference Area

Select this option to view and print a section or the entire report of the Goals Bank, accommodations listings, or view an entire listing of all Adobe forms contained in the system.

Additionally, this option provides a feature for users to reset their password and includes a number of system related features for ADMINISTRATOR users.

Miscellaneous Forms

Select this option to view a list of miscellaneous special education related forms. Some forms can be created using a data-driven interface, whereas others can be viewed in Adobe Acrobat and printed for completion. Examples of forms in this area are IEP Attendance Form, Written Affirmation of Consultation, FBA, CIA, BIP, and Student Exit Report.

Reporting

There are over 50 Point-and-Click Reports available in this Module. Additionally, the AdHoc Report Generator is located at the top of the Reporting Module screen. Click on the button labeled “Adhoc Report Generator” to enter the AdHoc Report Module. The AdHoc Report Module allows the user to create their own report design and criteria.

Medicaid Tracking

Select this option to allow service providers to enter, track, and report the daily services they provide to special education students. Additionally, providers and administrators can run reports to identify service needs and service discrepancies between services indicated in the IEP and services delivered. If your district utilizes Southwest Educational Billing Services to process your Medicaid claims and you have elected to utilize their web-based billing software, you can automatically access their system by enabling the SEBS system through the System Configuration feature available to the ADMINISTRATOR users under the Reference Area menu option.

To **Exit the application**, click the button labeled **Exit** located in the Navigation Toolbar in the upper-right-hand corner of the screen on the Main Menu. This will exit that application and return the user to the Log In screen.

NOTE: The software is best viewed in Internet Explorer 5.5 (or higher) on an MS Windows computer; or Internet Explorer 5.1.7 on a Macintosh computer running OS9; and Internet Explorer 5.2.3 on a Macintosh computer OS10; or Firefox 2.0 (or higher) on a Macintosh computer running OS10. Maximize the browser software to full screen and view at 800 X 600 or greater for the best view.

Notification Alert Feature

From the main menu, the Notification Alert report can be displayed by selecting the Notification Alert icon (i.e., ) located in the top left corner of the main menu. The report will display the following information (for all students assigned to the user for the group they are logged in under and for all groups they are assigned within the User Security area - see the Student Profile Module section below for details on assigning students to users):

- IEPs coming Due within the next 90 days.
- METs coming due within the next 90 days.
- Any upcoming meetings as scheduled per the Meeting Notice module.
- An evaluation due to be completed within the 60-day windows.
- System-wide messages (will appear in bold red at the bottom of the screen if entered by an ADMINISTRATOR user).

The Notification Alert feature will display the most recent data available within the e-IEP PRO.

List My Students Feature

The "List My Students" feature allows users to view a list of their individual students and more easily navigate to a student's record. The List My Students feature will display notices as follows:

a. All students assigned to the user for the group for which they are logged in.
b. All students assigned to the user for all groups they are assigned within the User Security area.
c. When a student is selected to be viewed from the list from a group that the user is not logged in under, the system will return to the Main Menu and will **switch the user to the new group** and the selected record will become active.

To view your list of students, from the main menu, select the "List My Students" icon (i.e.) located in the top right corner of the Main Menu. The screen will display the following information (for all students in which a user is set to be notified – see below for details):

User ID: jkline -

Student ID	Group	Student Name	DOB	In-Force IEP Date
001001	001	aaa-Initial Record (001)-1	1/1/1998	7/17/2007

The Student Name will display as a hyperlink. Clicking the Student Name will return you to the Main Menu with the selected student set as active. You may now navigate throughout the modules to complete your work relating to this student.

You can click the "List My Students" icon again to return to your list of students and choose another student to work on.

How To Add Students To The List

Students can be added to your list by adding them to the Notification area available on the Student Profiles form (e.g., the same process to add students to your "Notification Alert" feature available on the top left side of the Main Menu screen).

To add students to your list, follow these steps:

1. On the Main Menu, select the student that you desire to be added to your "List My Students." [See page 10 above for details on selecting students.]

2. With the desired student selected on the Main Menu, click the Student Profile Module button on the left side of the Main Menu or from the top Quick-Click Navigation Toolbar.

3. When inside the Student Profile Module, click the "Notification" tab (far right option) on the Form Navigation Toolbar. This will take you into the Notify User screen.

4. From inside the Notify User screen, scroll down the List of Potential Users to Notify bank box and select yourself and anyone else you desire to view this student on their list. [Hold down the Control (Ctrl) key or the Apple key on the Mac to select multiple users.] Then click the "Add Selected User" button.

5. When the screen refreshes, the users just selected will appear above the bank box. You can delete users by clicking the Trash Can icons to the left of each user name.

NOTE: When a student is selected to be viewed from the list from a group that the user is not logged in under, the system will return to the Main Menu and will switch the user to the new group and the selected record will become active.

Once you have set up the users you want to notify, return to the Main Menu by clicking the Main Menu button in the upper right corner.

Student Profile Module

Features Toolbar

To add or edit a student record, use the toolbar buttons located on the Features Toolbar. The button actions are discussed below.

(1) **Save** – Saves the data modified on the screen. The **Save** button MUST be clicked in order to Save any changes made to the record. If the **Save** button is not selected prior to moving to another screen, the data that was added/modified will be lost.

(2) **Add** – Adds a new record. This button is only displayed on the Profile Info screen within the Student Profile Module (i.e., it is not displayed on the SAIS Data Entry, Related Services Dates, and Attendance Data screens.) Enter the student's Last, First Name and their Student ID/SAIS ID. The Group Code cannot be change. Click the Add New Student button to return to the Student Profile screen to enter their data. Return to the Profile Info section from other modules of the system in order to add a new student.

(3) **Print** – Displays the page in a report format for easy printing.

(4) **Delete** – Will mark the record currently displayed for deletion. This **Delete** button will **<u>mark</u> the entire student record for deletion**, including all conference summaries, referrals, meeting notices, prior written notices, MET reports, and IEPs. **NOTES:** (1) This feature is only available to ADMINISTRATOR users; (2) Deleted records will be purged periodically.

Screen/Form Navigation Toolbar

To enter data in the other Student Profile sections (Profile Info, SAIS Data Entry, Attendance Data), use the Screen Selection toolbar, located below the Features Toolbar, to single-left click on the desired section.

Record Header

The Record Header that is located below the Screen Selection toolbar contains the Group and the Student/SAIS ID. The Header also contains the Date Last Updated (of the student record) and the Group ID and Username that made the last update.

Entering Data

Once the cursor is clicked into a field, the Tab key can be used to move from field to field. Type text into the text fields.

In fields where there is a pull-down selector, click on the triangle(s) on the right side of the field in order to display the selection options. Or, if the field is selected (i.e. the cursor is in/on the field), use the up and down arrow keys to move between selection options. A third option, if the field is selected, is to type the first letter of the desired item in the list; the first item that contains the letter typed will be displayed. The up and down arrow keys can then be used to navigate to the desired item.

To enter dates into a field, click on the calendar icon located to the right of the date field. Select the desired date on the calendar by single-left clicking. The date will display in the field. If you manually type in the date, the system will format the year, etc.

Student Profile Sections

Profile Info

This section contains the basic student data information.

To check the spelling of the text field, click the **Check Spelling** button below the desired field. For more information on using the Spell Check feature, see the "Spell Checking" section on page 4 above.

Note(s):

(1) Some of the fields in the Student Profile Module may have data that is displayed, but do not allow users to update it. Those data elements have been imported from the district's/school's student database system. These data values are synchronized routinely. If updates need to be made to the data, update it in the school's student database system, and then upon the next synchronization, the updates made in the student database will be reflected in the e-IEP PRO.

(2) The Inactive field allows marking students as active or inactive. To make a student Inactive, place a checkmark in the Inactive field. Students marked as inactive will be excluded from all compliance reports.

(3) The system does **not** automatically format phone numbers. The phone number format desired to be printed must be entered in the text boxes.

To enter data in the other Student Profile sections, use the Screen Selection Navigation toolbar to single-left click on the desired section.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

SAIS Data Entry

This module contains the data elements needed to submit SAIS data to the state as well as other useful district level data. This feature is available to ADMINISTRATOR users only.

To **Add** Special Education Need Codes to the student's record, click inside of the Special Education Need Codes Bank listbox to highlight/select the desired Need Code(s) to add. Click the **Add Selected SPED** button at the bottom of the screen to add it/them to the student's record. The Need Codes associated with the student will be located in a list directly above the Special Education Need Codes Bank.

To **Delete** Needs Codes, single-left click on the Trash Can icon located to the left of each Need Code desired to be deleted. The screen will refresh after each delete.

To **Save Changes** if the text within the fields has been modified, click the **Save** button in order to save the modified text.

To add multiple Need Codes at one time, hold the Ctrl key on the keyboard and select (click on) each desired Needs Code. Then click the **Add Selected SPED** button and all of the Needs Codes will be added.

To enter data in the other Student Profile sections, use the Screen Selection Navigation toolbar to single-left click on the desired section.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Attendance Data

To **Add** attendance data to the student's record, click inside of the School Years Bank listbox to highlight/select the desired school year(s) to add. Click the **Add Selected Attendance** button at the bottom of the screen to add it/them to the student's record. The school years associated with the student will be located in a list directly above the School Years Bank.

To **Delete** school years, single-left click on the Trash Can icon located to the left of each school year desired to be deleted. The screen will refresh after each deletion.

To **Save Changes**, if any of the text within the school year or Notes field have been modified, click the **Save** or **Save Changes** button in order to save the modified text.

To add multiple school years at one time, hold the Ctrl key on the keyboard and select (click on) each desired school year. Then click the **Add Selected Attendance** button, and all of the school years will be added.

To enter data in the other Student Profile section (Profile Info), use the Screen Selection Navigation Toolbar to single-left click on the desired section.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Notification

To **Add** users to be notified of events (ex., IEPs coming due) for the student via the Notification Alert Feature (see above), click inside the List Of Potential Users To Notify listbox to highlight/select the desired user to add. Click the **Add Selected User** button at the bottom of the screen to add user(s) to the student's record. The user(s) already associated with the student will be located in a list directly above the List Of Potential Users To Notify Bank.

To **Delete** users, single-left click on the Trash Can icon located to the left of each user desired to be deleted. The screen will refresh after each deletion.

To add multiple users at one time, hold the Ctrl key on the keyboard and select (click on) each desired user. Then click the **Add Selected User** button, and all of the users will be added.

To enter data in the main Student Profile section (i.e., Profile Info), use the Screen Selection Navigation Toolbar to single-left click on the desired menu section.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

History

The History page displays general information about the student's file. A record is inserted into the History table when the student is created, imported by the e-IEP PRO Data Agent through a data synch, and/or each time a student's record is transferred between districts.

Conference Summaries Module

Conference Summaries Selection screen

On the Conference Summaries screen, the list of all of the summaries associated with the student is displayed.

The student header is displayed at the top of the list.

To **Add** a new conference summary, single-left click the hyperlink titled **Add New Conference.** Enter date and click the "Add New Conference Summary" button.

To **Edit** or view individual conference summaries, single-left click the hyperlink for that date. The list is sorted by date. The type of conference is displayed next to the date.

To **Delete** a conference summary, single-left click on the Trash Can icon located on the left of each conference summary detail date desired to be deleted. The screen will refresh after each deletion.

To **Lock** a conference summary, single-left click on the Safe icon located to the far right of each Type. A confirmation message will display and after clicking OK, the screen will refresh and the Safe icon for the respective record will then be displayed as the text "Locked". An ADMINISTRATOR user can unlock the record by clicking on the "Locked" hyperlink for the respective record. A locked record can only be printed.

To **Print** a Conference Summary report, single-left click on the Printer icon located to the right of the Conference Summary detail date. The report will display.

Conference Summary Main Data screen

The Date of the Conference Summary displays in the center of the first line of the record header section. Enter data for all applicable fields on the Conference Summary Main screen. Click the **Save** button on the toolbar.

To enter data in the other Conference Summary sections (Recommendations or Conference Participants), use the Screen Selection Navigation Toolbar to single-left click on the desired section.

To automatically fill in the "Conference Location" and "Meeting Address" fields, locate the listbox in the middle of the screen labeled "Add/Update School". Scroll within the listbox and locate the desired location to add. Single-left-click to highlight the location and then single-left-click on the label/button labeled **Add/Update School**. The screen will refresh and the location name selected will appear in the "Conference Location" field. If the site's address has been added to the system (option to add these addresses is available to ADMINISTRATOR users), the corresponding address for the selected location will appear in the "Meeting Address" field. Select the **Save** button located on the Features Toolbar to save any text that was modified.

To check the spelling of the text field, click the **Check Spelling** button below the desired field. For more information on using the Spell Check feature, see the "Spell Checking" section above.

To **Print** the Conference Summary report, click the **Print** button on the Features Toolbar.

To return to the Conference Summary selection screen, click the button labeled **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Conference Recommendations screen

To **Add** conference recommendations to the student's summary record, click inside of the Conference Recommendations Bank listbox to highlight/select the desired recommendation(s) to add. Click the **Add Selected Recommendations** button at the bottom of the screen to add it/them to the student's record. The recommendations associated with the summary will be located in a list directly above the Conference Recommendations Bank.

To **Delete** recommendations, single-left click on the Trash Can icon located to the left of each recommendation desired to be deleted. The screen will refresh after each deletion.

To **Save Changes**, if the text within the recommendation field has been modified, click the **Save** button in order to save the modified text.

To add multiple recommendations at one time, hold the Ctrl key on the keyboard and select (click on) each desired recommendation. Then click the **Add Selected Recommendations** button, and all of the selected recommendations will be added.

To enter data in the other Conference Summary sections (Conference Summary Main or Conference Participants), use the Screen Selection Navigation Toolbar to single-left click on the desired section.

To **Print** the Conference Summary report, click the **Print** button on the Features Toolbar.

Conference Participants screen

To **Add** conference participants to the conference record, click inside of the Meeting Participant Bank listbox to highlight/select the desired meeting participant(s) to add. Click the **Add Selected Roles** button at the bottom of the screen to add it/them to the summary record. The meeting participants associated with the summary will be located in a list directly above the Meeting Participant Bank.

To **Delete** Meeting Participants, single-left click on the Trash Can icon located to the left of each participant/role desired to be deleted. The screen will refresh after each deletion.

To **Save Changes**, if the text within the Meeting Participant Role or Name fields has been modified, click the **Save** or the **Save Changes** button in order to save the modified text.

To add multiple meeting participants/roles at one time, hold the Ctrl key on the keyboard and select (click on) each desired meeting participant/role. Then click the **Add Selected Roles** button, and all of the selected meeting participants/roles will be added.

To add **Default Meeting Participant** Roles, if no meeting participants are added to the meeting notice, a button labeled **Default Meeting Participants** is displayed in the list area above the Bank. Click the **Default Meeting Participants** button. The screen will refresh and the default roles will display in the list above the Bank.

To **Copy Meeting Participants** from a Meeting Notice, if no meeting participants have been previously added to the IEP meeting participant list, a button labeled **Copy from Meeting Notice** is displayed in the list area above the Bank. Click the **Copy from Meeting Notice** button. The screen will refresh and the roles from the most recent meeting notice will display in the list above the Bank.

To enter data in the other Conference Summary sections (Main or Recommendations), use the Screen Selection Navigation Toolbar to single-left click on the desired section.

To **Print** the Conference Summary report, click the **Print** button on the Features Toolbar.

To return to the Conference Summary selection screen, click the button labeled **Select** located on the Features Toolbar.

Referral Module

Referral Selection Screen

On the Referral screen, the list of all of the referrals associated with the student is displayed.

The student header is displayed at the top of the list.

To **Add** a new referral, single-left click the hyperlink titled **Add New Form**. Select the type of Referral form desired and click the "Add New Referral Record" button.

To **Edit** or view individual referrals, single-left click the hyperlink for that date. The list is sorted by date. The description of the referral is displayed next to the date.

To check the spelling of the text field, click the **Check Spelling** button below the desired field. For more information on using the Spell Check feature, see the "Spell Checking" section on page 4 above.

To **Print** the Referral information, single-left click on the Printer icon located to the right of the description.

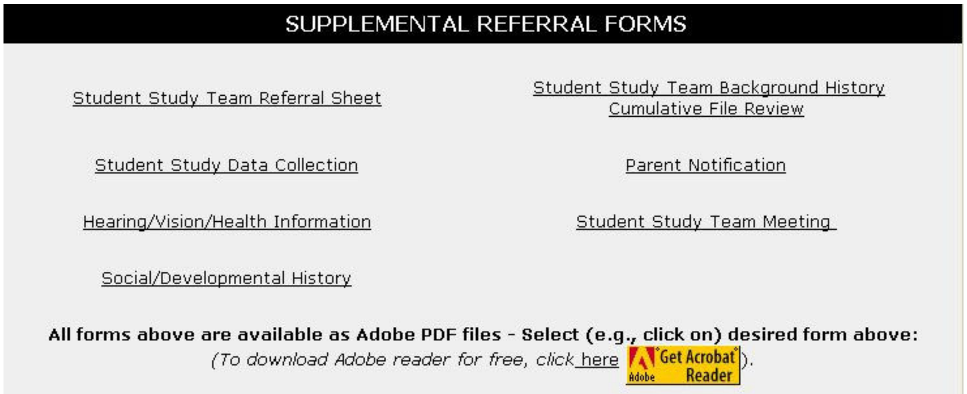
To **Delete** a referral, single-left click on the Trash Can icon located on the left of each referral detail date desired to be deleted. The screen will refresh after each deletion.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Referral Forms

At the bottom of the Referral selection screen is a list of Referral-related forms. Single-left click on the link of the desired form to view the form. The form allows for data to be entered in the fields of the form, printed, and/or saved to your computer's hard drive (or network drive). For more information on using Adobe, see the section below regarding Using Adobe.

Additionally, a number of data-driven Referral forms packets are available. These packets include: CST Referral, Speech Referral, Preschool-Aged Child Find Referral, School-Aged Child Find Referral, Related Service Evaluation, RTI Referral and RTI Intervention Plan.



Referral Forms Data Screens

The fields for each form are presented in each corresponding data entry screen. For packets with more than a single form, a screen navigation toolbar is presented at the top of the screens. After entering/changing data, click the **Save** button on the toolbar to save changes.

To return to the Referral selection screen, click the button labeled **Select** located on the Features Toolbar in the upper right-hand corner of the screen.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Meeting Notice Module

Meeting Notice Selection Screen

On the Meeting Notice screen, the list of all of the notices associated with the student is displayed.

The student header is displayed at the top of the list.

To **Add** a new Meeting Notice, single-left click the hyperlink titled **Add New Meeting Notice**. Enter the created date and single-left click the “Add New Meeting Notice” button.

To **Edit** or view individual Meeting Notices, single-left click the hyperlink for that date. The list is sorted by date. The purpose of the notice is displayed next to the date.

To **Delete** a Meeting Notice, single-left click on the Trash Can icon located on the left of each Meeting Notice detail date desired to be deleted. The screen will refresh after each deletion.

To **Copy** a Meeting Notice, single-left click on the Folder icon located on the left of each notice date desired to be copied. The screen will refresh and the copied record will display with current day's date.

To **Print** a Meeting Notice report, single-left click on the Printer icon located to the right of the Meeting Notice detail date. The report will display. The first Printer icon will print the Prior Written Notice on an English form. The second Printer icon will print the Prior Written Notice on a Spanish form.

To **Lock** a Meeting Notice, single-left click on the Safe icon located to the far right of each Meeting Notice record line. A confirmation message will display and after clicking OK, the screen will refresh and the Safe icon for the respective record will then be displayed as the text "Locked". An ADMINISTRATOR user can unlock the record by clicking on the "Locked" hyperlink for the respective record. A locked record can only be copied or printed.

Meeting Notice Main Data screen

The Date of the Meeting Notice displays in the center of the first line of the record header section. Enter data for all fields on the Meeting Notice Main screen. Click the **Save** button on the toolbar.

To enter data in the other Meeting Notice sections (Meeting Notice Purpose or Meeting Notice Participants), use the Screen Selection Navigation Toolbar to single-left click on the desired section.

To automatically fill in the "Meeting At/Location", "Meeting Address", and “Phone” field data, locate the listbox in the middle of the screen labeled "Add/Update School". Scroll within the listbox and locate the desired location to add. Single-left-click to highlight the location and then single-left-click on the label/button labeled **Add/Update School**. The screen will refresh and the location name selected will appear in the "Meeting At/Location" field. If the site's address and phone number have been added to the system (option to add these addresses is available to ADMINISTRATOR users under the Reference Area), the corresponding address and phone number for the selected location will appear in the "Meeting Address" and “Phone” fields. The user may modify any of the data contained in the text boxes. Select the **Save** button located on the Features Toolbar to save any text that was modified.

To **Print** the Meeting Notice report (in English), click the **Print** button on the Features Toolbar. For the Spanish version, return to the Meeting Notice Selection screen and use the Print button for the Spanish version for the respective notice.

To return to the Meeting Notice selection screen, click the button labeled **Select** located on the Features Toolbar.

Meeting Notice Purpose screen

To **Add** Meeting Notice Purposes to the student’s notice record, click inside of the Meeting Purposes Bank listbox to highlight/select the desired purpose(s) to add. The user may select either the English or Spanish version of the purpose statement. Each corresponding statement is listed next to each other and contains matching numbers. Click the **Add Selected Purposes** button at the bottom of the screen to add it/them to the student’s notice record. The purposes associated with the notice will be located in a list directly above the Meeting Purposes Bank.

To check the spelling of the text field, click the **Check Spelling** button below the desired field. For more information on using the Spell Check feature, see the “Spell Checking” section on page 4 above.

To **Delete** purposes, single-left click on the Trash Can icon located to the left of each purpose desired to be deleted. The screen will refresh after each deletion.

To **Save Changes**, if the text within the purpose field is modified, click the **Save** button in order to save the modified text.

To add multiple purposes at one time, hold the Ctrl key on the keyboard and select (click on) each desired purpose. Then click the **Add Selected Purposes** button, and all of the selected purposes will be added.

To enter data in the other Meeting Notice sections (Meeting Notice Main or Meeting Notice Participants), use the Screen Selection Navigation Toolbar to single-left click on the desired section.

To **Print** the Meeting Notice report (in English), click the **Print** button on the Features Toolbar. For the Spanish version, return to the Meeting Notice Selection screen and use the Print button for the Spanish version for the respective notice.

To return to the Meeting Notice selection screen, click the button labeled **Select** located on the Features Toolbar.

Meeting Notice Participants screen

To **Add** Meeting Notice participants to the Meeting Notice record, click inside of the Meeting Participant Bank listbox to highlight/select the desired meeting participant(s) to add. Click the **Add Selected Roles** button at the bottom of the screen to add it/them to the notice record. The meeting participants associated with the notice will be located in a list directly above the Meeting Participant Bank.

To add **Default Meeting Participant** Roles (as defined by the district/school), if no meeting participants are added to the meeting notice, a button labeled **Default Meeting Participants** is displayed in the list area above the Bank. Click the **Default Meeting Participants** button. The screen will refresh and the default roles will display in the list above the Bank.

To **Delete** Meeting Participants, single-left click on the Trash Can icon located to the left of each participant/role desired to be deleted. The screen will refresh after each deletion.

To **Save Changes**, if the text within the Meeting Participant Role or Name field has been modified, click the **Save** or **Save Changes** button in order to save the modified text.

To add multiple meeting participants/roles at one time, hold the Ctrl key on the keyboard and select (click on) each desired meeting participant/role. Then click the **Add Selected Roles** button, and all of the selected meeting participants/roles will be added.

To enter data in the other Meeting Notice sections (Meeting Notice Main or Meeting Notice Purpose), use the Screen Selection Navigation Toolbar to single-left click on the desired section.

To **Print** the Meeting Notice report (in English), click the **Print** button on the Features Toolbar. For the Spanish version, return to the Meeting Notice Selection screen and use the Print button for the Spanish version for the respective notice.

To return to the Meeting Notice selection screen, click the button labeled **Select** located on the Features Toolbar.

Prior Written Notice Module

Prior Written Notice Selection Screen

On the Prior Written Notice screen, the list of all of the notices associated with the student is displayed.

The student header is displayed at the top of the list.

To **Add** a new Prior Written Notice, single-left click the hyperlink titled **Add New Prior Written Notice**. Enter the date created and single-left click on the "Add New Notice" button.

To **Edit** or view individual Prior Written Notices, single-left click the hyperlink for that date. The list is sorted by date. The Action Proposed of the notice is displayed next to the date.

To **Delete** a Prior Written Notice, single-left click on the Trash Can icon located on the left of each Prior Written Notice detail date desired to be deleted. The screen will refresh after each deletion.

To **Copy** a Prior Written Notice, single-left click on the Folder icon located on the left of each evaluation detail date desired to be copied. The screen will refresh and the copied record will display with current day's date.

To **Print** a Prior Written Notice report, single-left click on the Printer icon located to the right of the Prior Written Notice detail date. The first Printer icon will print the Prior Written Notice on an English form. The second Printer icon will print the Prior Written Notice on a Spanish form.

To **Lock** a Prior Written Notice, single-left click on the Safe icon located to the far right of each Prior Written Notice record line. A confirmation message will display and after clicking OK, the screen will refresh and the Safe icon for the respective record will then be displayed as the text "Locked". An ADMINISTRATOR user can unlock the record by clicking on the "Locked" hyperlink for the respective record. A locked record can only be copied or printed.

Prior Written Main Data screen

The Date of the Prior Written Notice displays in the center of the first line of the record header section. Enter data for all fields on the **Prior Written Notice Main** screen. Click the **Save** button on the toolbar.

To check the spelling of the text field, click the **Check Spelling** button below the desired field. For more information on using the Spell Check feature, see the "Spell Checking" section on page 4 above.

To **Add** values from the bank boxes below each form section, click inside of the corresponding **Bank** listbox to highlight/select the desired statement to add. The user may select either the English or the Spanish version of the desired statement. Each corresponding statement is listed next to each other and contains matching numbers. A statement can be added from the bank by highlighting either the English or the Spanish statement with the bank box and then clicking the corresponding **Add English Statement** or **Add Spanish Statement** button. Only the individual English or the Spanish statement will be added based on which statement was highlighted and the button selected.

To **Save Changes**, if the text within any of the fields has been modified, click the **Save** or **Save Changes** button in order to save the modified text.

To **Print** the Prior Written Notice report, click the **Print** button on the Features Toolbar. For the Spanish version, return to the Prior Written Notice Selection screen and use the Print button for the Spanish version for the respective notice.

To return to the Prior Written Notice selection screen, click the button labeled **Select** located on the Features Toolbar.

Supporting Documentation Module

Supporting Documentation Selection Screen

On the Supporting Documentation selection screen, the list of all of the supporting documents associated with the student is displayed.

The student header is displayed at the top of the list.

To **Add** a new document, single-left click the hyperlink titled **Add New Supporting Documentation File**. (The maximum file size of a supporting documentation file is limited to 500KB).

To **View** individual documents, single-left click the hyperlink for that document name. The list is sorted by upload date. The File Name, Description, Notes icon (or N/A), and File Size (a file is limited to 500 KB) are displayed next to the date.

To **View** the Notes for a file, single-left click on the Notes icon for that document name. If no Notes were saved with the file, an "N/A." will be displayed in the Notes column for that document.

To **Delete** a document, single-left click on the Trash Can icon located on the left of document date desired to be deleted. The screen will refresh after each deletion.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Supporting Documentation Browse (Upload) Screen

The Student's Name, ID Number, Group Code, and Document's Upload Date cannot be changed.

Enter the description of the file in the File Description field.

Enter the file name to be uploaded. Click the Browse button located to the right of the Upload File Name field. The standard Windows Browse file box will display. Navigate in the Windows Browse file box to the desired file and highlight the file. Click the Open button on the Windows Browse file box. The file name will then be displayed in the Upload File Name field. Click the **Add Supporting Document** button located at the bottom of the screen in order to upload the file.

Enter notes into the Notes field (optional).

To check the spelling of the text field, click the **Check Spelling** button below the desired field. For more information on using the Spell Check feature, see the "Spell Checking" section on page 4 above.

To upload (add) the file to the student's record, single-left click on the button labeled **Add Supporting Document**.

Once the document has been added, to return to the Supporting Documentation Selection screen, single left click on the hyperlink labeled **RETURN TO DOCUMENT SELECTION SCREEN** located at the bottom of the page.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Evaluation/MET Module

Evaluation Selection Screen

On the Evaluation selection screen, the list of all of the evaluations associated with the student is displayed.

The student header is displayed at the top of the list.

To **Add** a new evaluation/MET, single-left click on either the hyperlink titled **Add New Evaluation/MET (ENHANCED Forms)** or the hyperlink titled **Add New Evaluation/MET (BASIC Forms)**. Enter the date and select the Type of Evaluation and single-left click on the "Add New MET/Evaluation" button.

NOTE: The new **Evaluation/MET (ENHANCED Forms)** have been developed in partnership with many of the e-IEP PRO districts within Arizona through Evaluation/MET workgroups over the past three years. The forms have been reviewed by ADE and have been confirmed to meet each of the areas of compliance. The **Evaluation/MET (BASIC Forms)** are the original forms that have also been used successfully by some of our e-IEP PRO customers in Arizona since 2001.

To **Edit** or view individual evaluations, single-left click the hyperlink for that date. The list is sorted by date. The type of evaluation is displayed next to the date.

To **Delete** an evaluation, single-left click on the Trash Can icon located on the far-left of each evaluation detail date. The screen will refresh after each deletion.

To **Copy** an evaluation, single-left click on the purple Folder icon located on the left of each evaluation detail date. The screen will refresh and the copied record will display with the current day's date. **NOTE:** You can only copy a BASIC set of forms to another BASIC set of forms and likewise an ENHANCED set of forms to another ENHANCED set of forms (e.g., you can not copy BASIC forms to ENHANCED forms).

To **Print** an evaluation report, single-left click on the Printer icon located to the right of each evaluation/MET detail date. The report selection screen will display.

To **Lock** an evaluation, single-left click on the Safe icon located to the far right of each MET detail date. A confirmation message will display and after clicking OK, the screen will refresh and the Safe icon for the respective record will then be displayed as the text "Locked". An ADMINISTRATOR user can unlock the record by clicking on the "Locked" hyperlink for the respective record. A locked record can only be copied or printed.

To set a MET as the **Most Recent** MET, select the "X" and it will change to a red checkmark (e.g., ). This designates that this MET contains the most recent Evaluation data for the student**. NOTE:** This setting is important for reporting and data linking purposes.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Determination of Eligibility Forms

At the bottom of the Evaluation selection screen is a list of Evaluation and Determination of Eligibility related forms. Single-left click on the link of the name of the desired form to view the form. The form allows for data to be entered in the fields of the form, printed, and/or saved to your computer's hard drive (or network drive). For more information on using Adobe, see the section below regarding Using Adobe.

Evaluation/MET Data Entry Forms

If an Evaluation/MET has been opened to be edited the list of available forms is provided in the Screen/Form Navigation Toolbar. Each form can be viewed and edited by selecting the desired form from this menu.

Spell-checking is available below each of the large text box areas. Text can be checked for spelling errors by selecting the “Check Spelling” box below the text box.

To **Save** data on the respective screen, click the Save button on the Features Toolbar.

To **Print** the Evaluation/MET report, click the Print button on the Features Toolbar.

If using the ***ENHANCED*** forms, please note that:

1. The values selected within Form E4, section “F: Team determines….” will determine which corresponding choices are available on Forms E5 and E6.
2. The data entry forms and printed forms can be customized by ADMINISTRATOR users within the System Configuration settings area. Contact your district Primary Contact or User Support for more information.
3. Copying of old MET versions are prevented when only “Enhanced” METs are enabled.

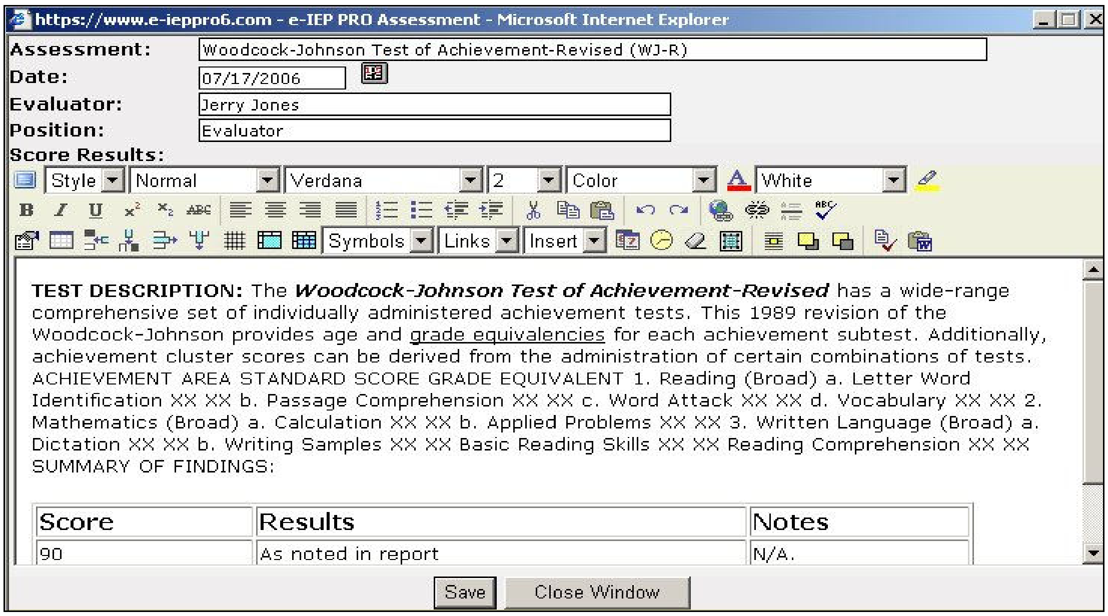
To return to the Evaluation selection screen, click the button labeled **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Using the Evaluation/MET Assessment Score Field (*Enhanced Forms Only*)

NOTE: *This feature is optional and can be activated by an ADMINISTRATOR User.*

To enter Assessment data, select the checkbox to the left of the Assessment area title (i.e., the checkbox contains a checkmark) and then select the "Enter/View Details". Select OK to confirm to save changes. Then select the "Add New Assessment". Select the desired new assessment, enter the appropriate date, evaluator and position and then select the Save button at the bottom of the form. To edit the score field using the ***WYSIWYG*** (*What You See Is What You Get*) editor, select the desired assessment under the heading **Assessment(s) Administered**. The WYSIWYG editor box as depicted below will be displayed.



Features available via the WYSIWYG Tool include:

	Bold		Insert date
	Italics		Insert time
	Underline		Select all text
	Superscript		Cut text
	Subscript		Copy text
	Left justify text		Paste text
	Center justify text		Undo action
	Right justify text		Redo action
	Insert numbering		Spell check text
	Insert bullet points		Insert table
	Indent text left		Edit table
	Indent text right		Copy text from Word

To view the WYSIWYG text area in full screen mode, select the button immediately below the **Score Results** field in the top left corner. To exit this screen, select the button in the top left corner.

Printing Evaluation/MET Report

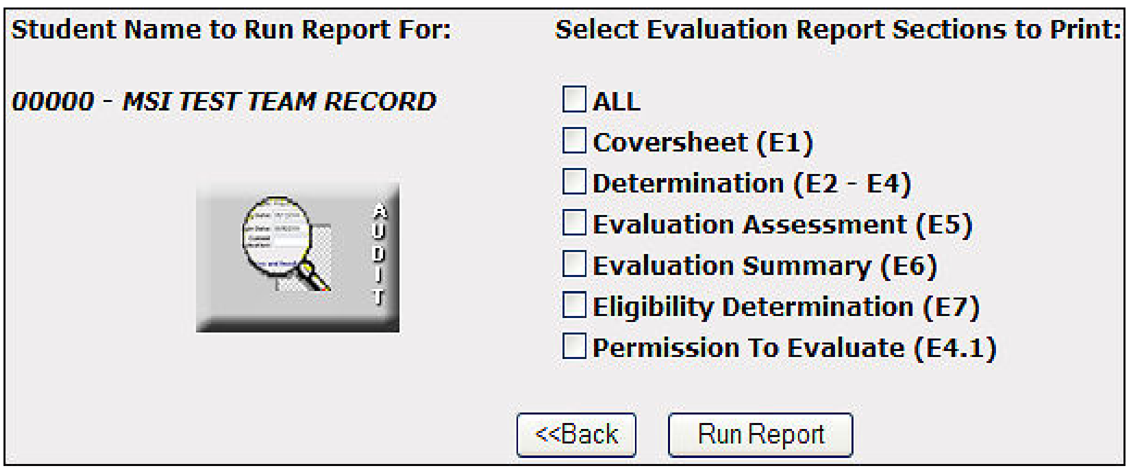
To **Print** the Evaluation report, select the **Print** button located on the Features Toolbar of the specific Evaluation data screen or from the **Print** button on the Evaluation Selection screen.

The right side of the screen details the sections of the Evaluation report that can be printed. Select the checkboxes (i.e., the checkbox contains a checkmark) next to the desired sections to be printed.

A MET ***"Audit"*** can be completed by selecting the Audit button located on the MET Print screen. You can audit a MET at any time during the MET process to search for potential errors or to identify areas that may need more information.

Printing the Report

Upon clicking the **Run Report** button, the student's report will be viewed in an html webpage. To print the report, click the **Print** button on the browser's toolbar, or use the File menu, and select the Print option.



See "Printing the Page" above for details on setting the print page settings.

Saving the Report

To **Save** the report, go to the File menu choice on the browser's menu bar and select the Save As option. Navigate to the directory where the report should be saved. Modify the report title in the File Name field. Click the **Save** button. **NOTE:** The report must be saved as an ".htm(l)" file type in order to format properly. The file can then be opened using a browser (to view or print) or a word processing software package (e.g., Word, WordPerfect) to modify the text and print.

Documents can also be saved to an **Adobe PDF** file. To accomplish this, we recommend that users utilize PrimoPDF® (free software). PrimoPDF® installs as a standard printer and users can easily print forms directly to PDFs using this free utility. Since PrimoPDF® allows password protecting and encryption, using PrimoPDF® to create PDF versions of the printed forms will allow a user to e-mail the printed documents (Mtg Notices, IEPs, METs, etc.) to parents and others in a HIPAA and FERPA compliant manner. Users can download Primo PDF at http://www.primopdf.com/.

Exiting the Report (*when printing*)

To **Exit** the report, click the **Back** button on your browser's toolbar or single-right click anywhere on the report screen and left click on the **Back** option.

To return to the previous screens, click the button labeled **Eval** located in the Navigation Toolbar in the upper right-hand corner of the screen.

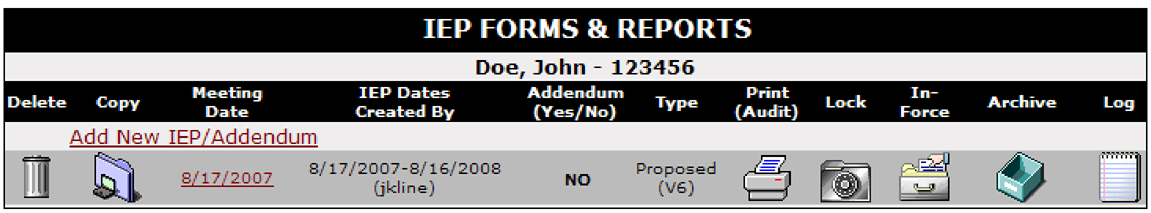
To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

IEP Designer

(NOTE: ***If your district does not use the Enhanced (V7) IEP forms, refer to the Version 7.0 User's Guide for additional and more specific details*****)**

IEP Selection Screen

On the IEP selection screen, the list of all of the IEPs for the student is displayed.



IEP FORMS & REPORTS										
Doe, John - 123456										
Delete	Copy	Meeting Date	IEP Dates Created By	Addendum (Yes/No)	Type	Print (Audit)	Lock	In-Force	Archive	Log
	Add New IEP/Addendum									
		8/17/2007	8/17/2007-8/16/2008 (jkline)	NO	Proposed (V6)					

To **Add** a new IEP, single-left click the hyperlink titled **Add New IEP/Addendum**. Select the type of IEP to be added and enter the data on the screen. IEPs types that can be added are:

- *Standard IEP* - creates a normal IEP with a default IEP Type of Proposed.
- *Full Addendum* – creates an Addendum that is a copy of the In-Force IEP/Addendum. **NOTE:** The current In-Force IEP or Addendum will be archived.

To **Edit** or view individual IEPs, single-left click the hyperlink for that date. The list is sorted by date. The time period of the IEP is displayed next to the date.

To **Delete** an IEP, single-left click on the Trash Can icon () located on the left of each Copy icon (see below). The screen will refresh after each deletion. Only the user who creates the IEP or ADMINISTRATOR users will be able to delete the IEP.

To **Copy** an IEP, single-left click on the Purple Folder icon () located on the left of each IEP Meeting date. The screen will refresh and the copied record will display with the current day's date. An exact copy of all the data contained within the selected IEP will be copied into the new record. **NOTE:** All areas of the IEP will be copied except for the areas that have been marked for exclusion. ADMINISTRATOR users are able to set IEP areas to be excluded. The following IEP areas can be marked for exclusion from the copy feature:

• **IEP Dates (Begin and End Dates)**	• **Classroom Accommodations Provided to Teacher(s)**
• **PLEP Data**	• **ESY Data**
• **Goals and Objectives**	• **Meeting Participants**
• **Service Start and End Dates**	• **Assessment Accomm. (standard & non-standard).**

To **Print** an IEP report, single-left click on the Printer icon () located to the right of each IEP Type. The report selection screen will display.

To set an IEP as **In-Force**, single-left click on the File Cabinet icon () located to the right of the lock icon. The system will only allow one IEP to be set to In-Force. To set an IEP as Proposed, single left click on the red checkmark icon() located to the right of the lock icon. The system allows an unlimited number of Proposed IEPs to be stored in the system. Once an IEP is no longer In-Force because the IEP period has passed, the record can be archived by clicking on the green box icon (). Once archived, the record cannot be edited or modified. It can only be viewed and/or printed.

To **Lock** an IEP, single-left click on the Safe icon () located to the far right of each IEP Print icon. For ***In-Force IEPs***, an ADMINISTRATOR user can unlock locked IEPs by clicking on the "Locked" hyperlink for the respective record. For ***Proposed IEPs***, an ADMINISTRATOR user or the person who created the IEP can unlock the IEP record by clicking on the "Locked" hyperlink for the respective record. **NOTE:** A locked record can only be copied or printed. Although, Progress Data can be updated for a locked record that is In-Force. When copying a locked IEP record, an UNLOCKED copy is created.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Creating Addendums

Addendums can be created as needed. Rules for creating IEP Addendums include the following:

1. An In-Force IEP or In-Force Addendum IEP must exist to create an IEP Addendum.
2. The created IEP Addendum is an exact copy of the In-Force IEP or IEP Addendum. **NOTE:** An addendum will also contain "Addendum Date", "Summary of Conference Discussion" and "Description of Program Change” fields on the Coversheet.
3. Creating an IEP Addendum will automatically archive and lock the In-Force IEP.

IEP Log

The IEP Designer Module contains an IEP log area as part of each IEP document that allows for electronically documenting staff who have viewed/accessed the IEP document. The IEP Log can be accessed by selecting the “Log” () option, the right most icon on the selection screen.

To create a new log item:

1. Scroll to the bottom of the form and enter the staff person’s name, date they reviewed the IEP and the reason.
2. Select the “Insert New” button at the bottom of the form.

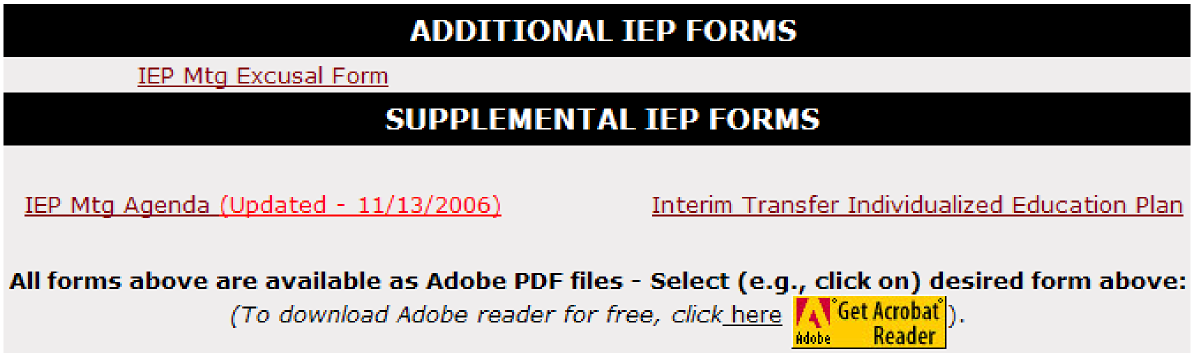
Log items already added can be updated in the top part of the screen and then the “Update” button can be selected to save the changes. Log items can be deleted by selecting the delete icon to the far right of each item.

The IEP Log screen allows printing individual IEP Logs. Additionally, this feature is accessible from the IEP Selection screen.

To return to the IEP selection screen, click the button labeled **Select** located on the Features Toolbar.

Additional Miscellaneous IEP Forms

At the bottom of the IEP selection screen is a list of additional IEP related forms. Single-left click on the link of the name of the desired form to view the form. Some of the forms allow for data to be entered in the fields of the form, printed, and/or saved to your computer's hard drive (or network drive). For more information on using Adobe, see the section below regarding Using Adobe.



This section provides additional information about the new Enhanced or V7 IEP forms available within Version 7.0 and Version 8.0 of the e-IEP PRO. These forms are denoted by the text “(V7)” being displayed under “Type” column on the IEP Selection screen.

IEP Cover Sheet (Form A)

Complete the information questions using an assortment of data field types – checkboxes, text fields, and pull-downs.

Level of Service (LOS)

Please note, after setting and saving the Level of Service field on Form I, the Level of Service (LOS) will appear on the IEP Coversheet Form A.

IEP Meeting Participants

To **Add** meeting participants to the student’s record, click inside of the Meeting Participant Bank listbox to highlight/select the desired meeting participant(s) to add. Click the **Add Selected Roles** button at the bottom of the screen to add it/them to the student’s record. The meeting participants associated with the notice will be located in a list directly above the Meeting Participant Bank.

To add **Default Meeting Participant** Roles, if no meeting participants have been previously added to the meeting notice, a button labeled **Default Meeting Participants** is displayed in the list area above the Bank. Click the **Default Meeting Participants** button. The screen will refresh and the default roles will display in the list above the Bank.

To **Copy Meeting Participants** from a Meeting Notice, if no meeting participants have been previously added to the IEP meeting participant list, a button labeled **Copy from Meeting Notice** is displayed in the list area above the Bank. Click the **Copy from Meeting Notice** button. The screen will refresh and the roles from the most recent meeting notice will display in the list above the Bank.

To **Delete** Meeting Participants/Roles, single-left click on the Trash Can icon located on the left of each Meeting Participants desired to be deleted. The screen will refresh after each deletion.

To **Save Changes**, if the text within the Meeting Participant Role or Name field has been modified, click the **Save** or **Save Changes** button in order to save the modified text.
To add multiple meeting participants/roles at one time, hold the Ctrl key on the keyboard and select (click on) each desired meeting participant/role. Then click the **Add Selected Roles** button, and all of the selected meeting participants/roles will be added.

IEP PLAAFP 1-3 (Form B)

Complete the information questions using an assortment of data field types – radio buttons, text fields, and pull-downs.

NOTE: Areas of Eligibility are selected in the Category of Eligibility / Level of Service / Participation (LOS) section of the IEP Cover Sheet (Form A)

IEP PLAAFP 4-5 (Form B)

Complete the information questions using an assortment of data field types – radio buttons, text fields, and pull-downs.

Section 4: Functional Performance

Transition data will be available if the student is 16 years old or older or if the "Elementary PLAAFP Override" is set to true on the IEP Coversheet data entry screen. The fields, "**Student expressed an interest in the following career areas"** and **"Student's job preference at this time is"** will link to Form G (see below).

Section 5: Summary of Educational Needs

This section identifies the educational services that will require goals and services. All special education and related services selected here will appear as services on Form I where the Instr. Setting/Location; Start Date; Frequency; End Date; and Provider information can be entered.
NOTES: (*1) **Special Education and Related services** cannot be entered on the Services form – they must be entered on Form B and then they will appear on Form I. (2) If **SLD** has been identified on Form A, the SLD areas checked will automatically appear as services on Form B and subsequently on Form I.*

IEP Considerations (Form C)

Select the appropriate checkbox located to the left of each **Consideration**.

IEP Accommodations (Form E)

Complete the information questions using an assortment of data field types – radio buttons, checkboxes, and text fields.

Accommodations

To **Add** accommodations to the student's record, click inside of the Accommodations Bank listbox to highlight/select the desired accommodation to add. Click the **Add New** button at the bottom of the section to add the accommodation to the student's record. The accommodations associated with the student will be located in a list directly above the Accommodations Bank. Before adding accommodations, be sure to save any changes on the page first.

To **Delete** Accommodations, select the Trash Can icon next to the Accommodation(s) desired to be deleted.

To **Save Changes**, if the text within the Accommodation has been modified, click the **Save** button on the Features Toolbar.

To add multiple accommodations at one time, hold the Ctrl key on the keyboard and select (click on) each desired accommodation. Then click the **Add New** button, and all of the selected accommodations will be added.

IEP Assessments (Form F)

Complete the information questions using an assortment of data field types – radio buttons and checkboxes.

For the AIMS Test Results & Graduation Level Of Performance Sections, choose the appropriate choice from the list boxes and pull-downs.

IEP Transition (Form G)

Complete the information questions using an assortment of data field types – checkboxes, text fields, and pull-downs.

The fields of "**Student expressed an interest in the following career areas"** and **"Student's job preference at this time is"** will come from IEP PLAAFP 4-5 (Form B) Section 4: Functional Performance.

NOTE: This form will be available if the student's age is 16 or older or if the "Elementary PLAAFP Override" is set to true on the IEP Coversheet data entry screen.

IEP Transition (Form H)

Complete the information questions using an assortment of data field types – checkboxes, text fields, and pull-downs.

NOTE: This form will be available if the student's age is 16 or older or if the "Elementary PLAAFP Override" is set to true on the IEP Coversheet data entry screen.

IEP Environment & Services (Form I)

Complete the information questions using an assortment of data field types – pull-downs, radio buttons, checkboxes, and text fields.

Services, Related Services, Modifications and Supplemental Aides

All special education and related services that were selected on Form B Section 5 will be listed under the Special Education and Related Services area as appropriate. The **Instructional Setting/Location; Start Date; Frequency; End Date; and Provider** information can be documented for each of the services on this form.

LOS Worksheet

To help calculate the Level of Service, a Level of Service Worksheet is available by clicking on the hyperlink labeled "**Level Of Service Worksheet**". Instructions are contained within the worksheet on how to calculate the level of service. Upon completion of the worksheet, choose the appropriate Level of Service from the drop down listbox. **NOTE:** After selecting the Save button, the Level of Service will appear on the IEP Coversheet Form A.

Instructional Setting/Continuum of Service

To assist in choosing the Instructional Setting/Continuum of Service a description is available by clicking on the hyperlink labeled "**Click Here To View The Instructional Setting Definitions**".

IEP Health Aide Medicaid Services Form (Form I2)

Complete the information questions using an assortment of data field types – list boxes, text fields, and pull-downs.

Print Parent Consent
The parental consent form has been more fully integrated into the IEP Designer allowing IEP services to be automatically printed on the consent form. Specifically the Medicaid Parent Consent feature allows marking IEP special education and related services as DSC services and thereby printing these on the parent consent forms. This new feature and functionality can be accessed by navigating to the bottom of Form I2 and by completing the following steps:

1. Select the link labeled "Click Here To View/Edit IEP DSC Services".
2. To print the English Consent form, select the option labeled "Click here to print DSC Parent Consent Form – English" under Section "H. Print Parent Consent".
3. To print the Spanish Consent form, select the option labeled "Click here to print DSC Parent Consent Form – Spanish" under Section "H. Print Parent Consent".

NOTES:

- Form I2 will be available if it is turned on by your district/school administrator.
- The parental consent form is available as one of the forms that can be printed on the IEP Print screen and therefore it can be printed as part of the printed IEP packet.

IEP Prior Written Notice Configuration Screen

The PWN Configuration screen allows for the automatic generation of the Prior Written Notice based on information documented within the IEP. By selecting the options on the PWN screen, the Prior Written Notice will be automatically generated and saved to the Prior Written Notice module. Additionally, the PWN will appear on the IEP Print screen as an optional form to be included in the printed IEP packet.

Complete the information questions using an assortment of data field types – checkboxes, text fields, and pull-downs.

.
Review & Complete PWN automatically generates and includes statements chosen within the PWN.

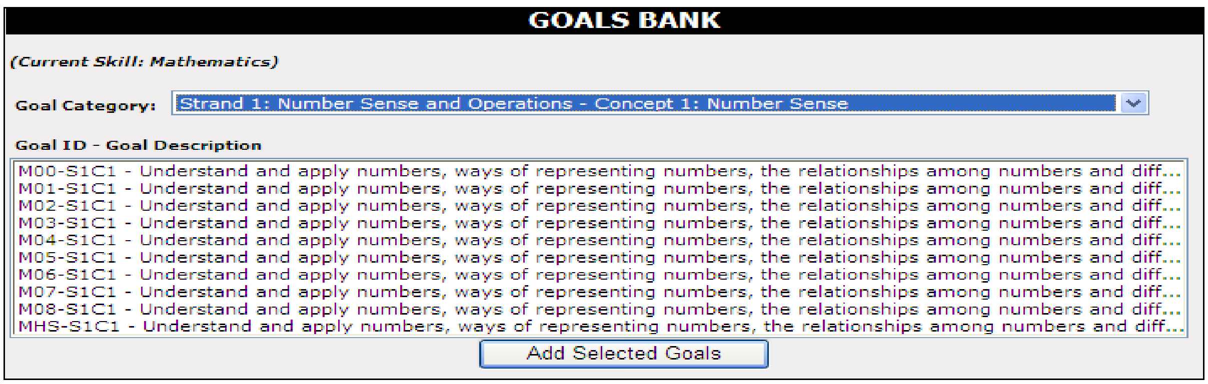
IEP Student Goals & Progress Reporting (Form D)

The Goals screen Record Header contains the Student's Name, ID, and Current Skill.

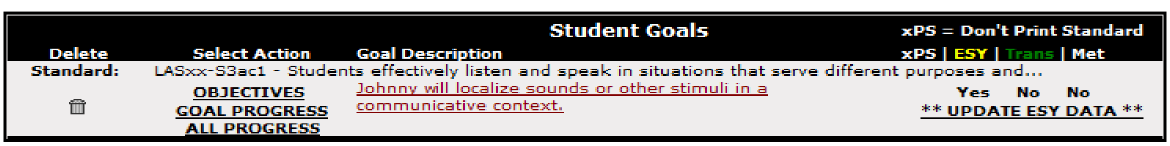
To **View / Edit** goals within a different skill area, click on the respective maroon button labeled with the desired skill area. If goals have been added within a skill area, a red checkmark will display in the top right corner of the skill's button.

To **Add** goals to the student's record/skill area, select the appropriate **Goal Category** from the pull-down box located inside of the Goals Bank area. Once the available goals are displayed in the listbox located below the Goal Category field, click inside of the Goals Bank listbox to highlight/select the desired goal to add. Click the **Add Selected Goals** button at the bottom of the screen to add the goal to the student's record. The goals associated with the student will be located in a list directly above the Goals Bank.

To add multiple goals at one time, hold the Ctrl key on the keyboard and select each desired goal. Then click the **Add Selected Goals** button, and all of the selected goals will be added.



Once the goal is added, click the "**** Click Here to Add Goal Statement ****" link (or the goal statement will be displayed as an underlined link if a goal has already been entered). This will open the Student IEP Goal Data Entry screen (see below for details).



To **Delete** goals, select the Trash Can icon to the far left of each goal record to be deleted. The screen will refresh after each deletion.

To **Add / View / Modify Objectives** to the goal in the list of the student's goals, locate the goal desired to add objectives. Click on the link labeled "OBJECTIVES" located to the left of the goal's text. This will link to the Objective screen to enter/modify objectives.

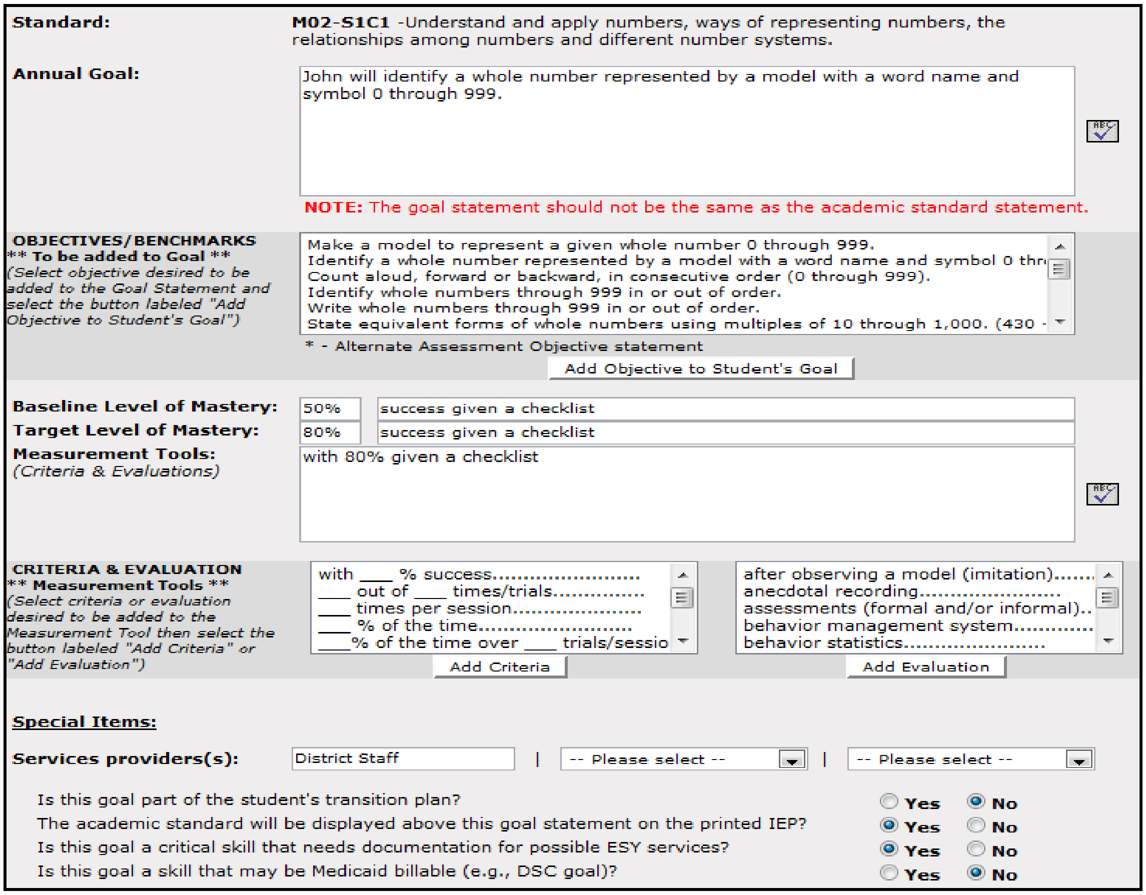
To **Update Progress** for the goal, click on the link labeled "GOALS PROGRESS" (see below for details).

To **Update ESY Data** (if the goal is set as an ESY goal) for the goal, click on the link labeled "** UPDATE ESY DATA**" on the right of the goal statement.

To **Print Preview** the IEP Goals form, click the **Print Preview** button on the Features Toolbar (i.e., ).

IEP Goals Data Entry

The annual goal statement can be typed directly into the annual goal text box and/or objective/benchmark statements can be selected from the bank listed immediately below the goals text box. To add an objective/benchmark to the goal statement, highlight the desired statement in the Objective/Benchmark bank and then select the “Add Objective…” button.



To **Spell Check** the Goal Description or other text boxes, single-left click the ABC icon located directly to the right of the text box. For more information on using the Spell Check feature, see the “Spell Checking” section on page 4 above.

To **Add Measurement Tools**, text can be typed directly into the text box and/or criteria and evaluation statements can be selected from the banks listed immediately below the Measurement Tools text box. To add a criteria or evaluation to the measurement tool statement, highlight the desired statement in the criteria or evaluation bank and then select the “Add Criteria” or “Add Evaluation” button as appropriate.

An optional field titled “Measurement Accommodations” can be set on (via the ADMINISTRATOR configuration screen).

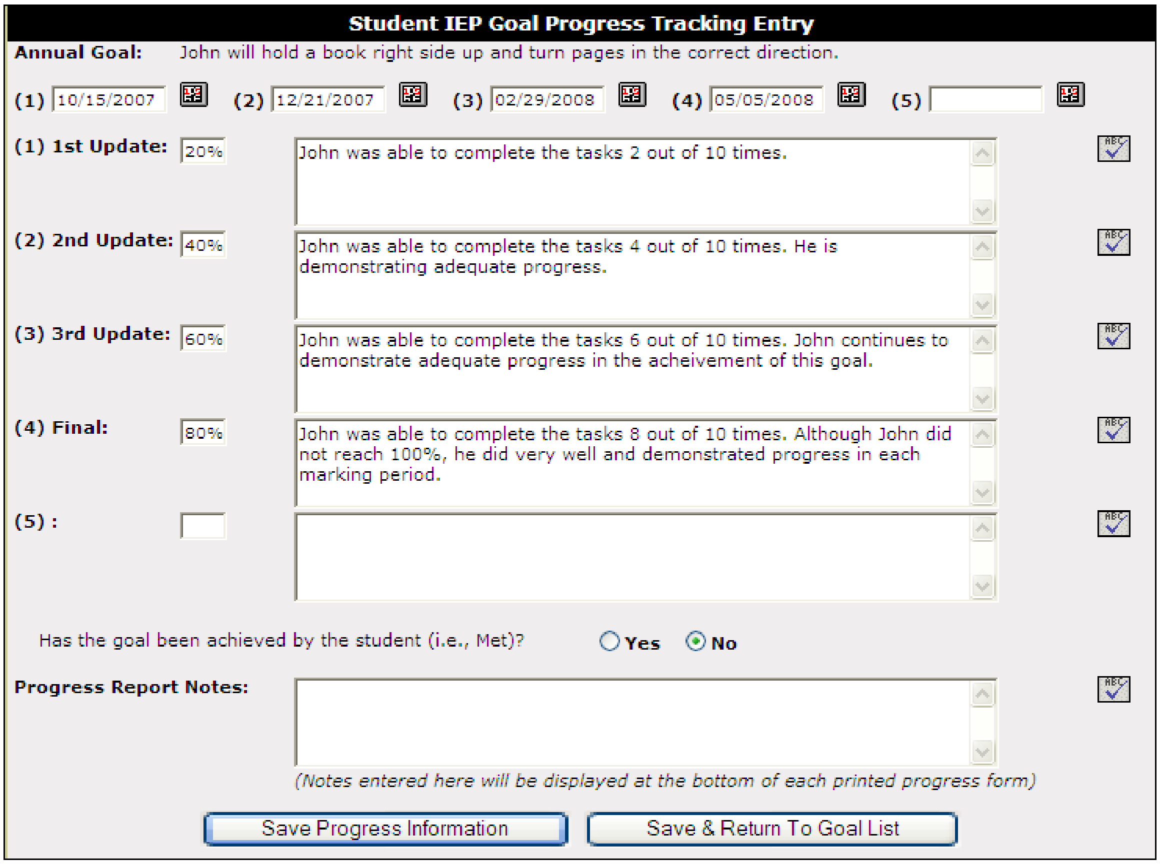
Service Providers as well as whether the goal is a transition goal, ESY goal, Medicaid/DCS goal or if it is desired that the corresponding Arizona Academic standard prints as part of the goal statement on the printed form can be defined in the Special Items section at the bottom of the form.

To return to the **Goals Screen**, click the **IEP Data** button located on the Features Toolbar.

Goal Progress Data

A date can be entered for each progress time period. Additionally a progress score and corresponding narrative can be entered for each progress time period. At the bottom of the form, whether or not the student has met (achieved) the goal can be documented.

In addition, **Progress Notes** can be added at the bottom of the **Student IEP Goal Progress Tracking Entry** screen and will be displayed at the bottom (footer) of each printed progress form.



NOTE: Click the ALL PROGRESS link in the goal to go to a data entry screen that allows updating the progress data for **all** of the student's goals in a single screen.

IEP Student Objectives

The Objectives screen Record Header contains the Student's Name, ID, and Current Skill, and the Goal code and text.

To **Add** objectives to the student's goal, click inside of the Objectives Bank listbox to highlight/select the desired objective to add. Click the **Add Selected Objectives** button at the bottom of the screen to add it to the student's goal. The objectives associated with the student's goal will be located in a list directly above the Objectives Bank.

To **Save Changes**, if the text within the objective has been modified, click the **Save** or **Save Changes** button in order to save the modified text.

To **Delete** objectives, select the Trash Can icon next to the objective(s) desired to be deleted. The screen will refresh after each deletion.

To add multiple objectives at one time, hold the Ctrl key on the keyboard and select each desired objective. Then click the **Add Selected Objectives** button, and all of the selected objectives will be added.

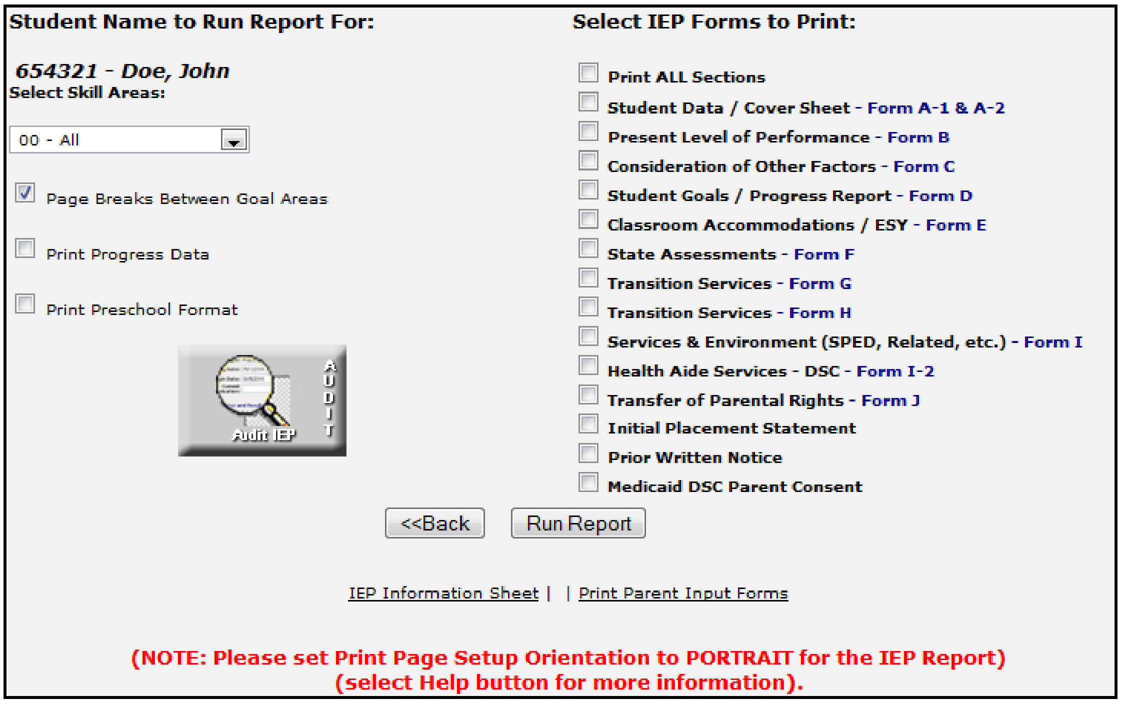
To **Spell Check** the Objective Description, single-left click the ABC icon located directly underneath the objective's "Adequate Progress?" checkbox on the right side of the screen. For more information on using the Spell Check feature, see the "Spell Checking" section on page 4 above.

To return to the Goals screen, click the button labeled **Goals** located on the Features Toolbar.

To return to the Cover Sheet, click the **IEP Data** button located on the Features Toolbar.

IEP Audit

An IEP audit can be completed by selecting the Audit button located on the IEP Print screen. You can audit an IEP at any time during the IEP process to search for potential errors or to identify areas that may need more information.



IEP Report

To **Print** the IEP report, select the **Print** button located on the Features Toolbar of the specific IEP data screen or from the **Print** button on the IEP Selection screen.

If the user does not desire to print all Skill Areas, then select a Skill Area (for the Student Goals/Progress Report option) to print from the pull-down box labeled **Select Skill Areas**.

The "Page Breaks Between Goal Areas" allows a user to include or remove page breaks between Skill Areas within the Goals pages of the IEP Report. The default setting is to include page breaks. To remove the page breaks, uncheck the checkbox next to the text that reads "Page Breaks Between Goal Areas".

The “Print Progress Data” allows a user to include or remove the progress report data within the Goals pages of the IEP Report. **NOTE:** The default setting is to include progress data (checked) if the IEP is locked and to not include progress data (unchecked) if unlocked.

The “Print Preschool Format” will print the IEP in a preschool friendly font (i.e., Comic San-Serif font). The default setting is to print in the standard Verdana font (unchecked).

The right side of the screen details the sections of the IEP report that can be printed. Select the checkboxes (i.e., single-click so that the checkbox contains a checkmark) next to the sections desired to be printed.

To Print or View an Initial Placement Form, IEP Information Sheet or Parent Survey form, single-left click the quick link on the appropriate link located underneath the list of IEP sections on the right side of the screen.

Printing the Report

Upon clicking the **Run Report** button, the student’s report will be viewed in an html webpage. To print the report, click the **Print** button on the browser’s toolbar, or use the File menu, and select the Print option on the browser’s menubar.

See “Formatting the Page” under the Navigation section above for details on setting the print page settings.

Saving the Report

To **Save** the report to the hard drive, go to the File menu choice on the browser’s menubar and select the Save As option. Using the Browse dialog box that displays, navigate to the directory where the report should be saved. Modify the report title in the File_Name field. Click the **Save** button. **NOTE:** The report must be saved as an “.htm(l)” file type in order to format properly. The file can then be opened using Internet Explorer (to view or print) or a word processing software package (e.g., Word, WordPerfect) to modify the text and print.

Documents can also be saved to an **Adobe PDF** file. To accomplish this, we recommend that users utilize PrimoPDF® (free software). PrimoPDF® installs as a standard printer and users can easily print forms directly to PDFs using this free utility. Since PrimoPDF® allows password protecting and encryption, using PrimoPDF® to create PDF versions of the printed forms will allow a user to e-mail the printed documents (Mtg Notices, IEPs, METs, etc.) to parents and others in a HIPAA and FERPA compliant manner. Users can download Primo PDF at http://www.primopdf.com/.

Exiting the Report

To **Exit** the report, click the **Back** button on your browser’s toolbar.

To return to the previous screen, click the button labeled **IEP Data** or **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Reference Area

To view one of the Goals Bank, Accommodations or other Bank Reports, single-left click on the report title (hyperlink) of the desired report. These reports will be displayed on the screen and can be printed using the Print option on the Internet Explorer software toolbar (click File, click Print, or Print Preview).

To view a menu which lists all of the forms formatted in Adobe Acrobat contained throughout the system, single-left click on the title/link **All e-IEP PRO Adobe Forms (Referral, MET, IEP, and Misc.)**.

To **change your password**, single-left click on the title/link **Change your password**.

For ADMINISTRATOR users, the **Administrator User Features** section will display at the bottom on the screen. To obtain information about using these features, contact your Primary Contact (or Tech Support if you are the Primary Contact).

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

All e-IEP PRO Adobe Forms

To view an Adobe pdf form, single-left click on the title/link of the form desired to be viewed. The form will be displayed in Adobe Acrobat and the form can then be printed.

For more information on using Adobe, see the section below regarding Using Adobe.

To return to the Reference Area screen, click the button labeled **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Change Your Password

To change your password, enter your old password in the first field. Enter your desired new password in the second field. Re-type your desired new password in the third field. Single-left click the **Submit Change** button. If the new password entered into the second and third fields does not match, a message box will display to tell you that they do not match. Re-enter the desired password in both boxes and click the Submit Change button.

Your new password will become effective immediately upon clicking the Submit Change button.

The rules for creating a password include:

* Passwords must be a minimum of 4 positions in length
* Passwords must contain at least one numeric character (e.g. 0-9)

To return to the Reference Area screen, click the button labeled **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Administrative Features

To obtain additional information in utilizing these features, see the ADMINISTRATOR User's Guide located on the User Support page or as provided by your e-IEP PRO trainer.

User Account Set-up Rules include:

* User Accounts must start with an alpha character (e.g. a-z)
* User Accounts must be at least 4 positions in length
* Duplicate User Accounts cannot be added

Password Set-up Rules include:

* Passwords must be 4 positions in length
* Passwords must contain one number character (e.g. 0-9)

To return to the Reference Area screen, click the button labeled **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Miscellaneous Forms

The top section of the screen contains a list of all of the data-driven forms associated with the student. The bottom section of the screen contains a list of miscellaneous forms in Adobe pdf format. Data-driven forms means that, upon creating a new form, all of the data entered into the form will be saved into the database.

Misc. Form Selection Screen

On the Miscellaneous Form screen, all data-driven forms added for the student are displayed in the top portion of the screen.

The student header is displayed at the top of the list.

To **Add** Misc. Forms, single-left click the hyperlink titled **Add New Form**. Select the Form Type and click the **Add New Form** button. To return to the Misc. Forms screen without adding a new form, click the **Select** button located on the Navigation Toolbar.

To **Edit** or view individual Misc. Forms, single-left click the hyperlink for that date. The list is sorted by date. The Form Type is displayed next to the date.

To **Delete** a Misc. Form, single-left click on the Trash Can icon located on the left of each Misc. Form detail date desired to be deleted. The screen will refresh after each deletion.

To **Print** a Misc. Form, single-left click on the Printer icon located to the right of the Misc. Form detail date. The report will display.

To **Lock** a Misc. Form, single-left click on the Safe icon located to the far right of each Printer icon. A confirmation message will display and after clicking OK, the screen will refresh and the Safe icon for the respective record will then be displayed as the text "Locked". An ADMINISTRATOR user can unlock the record by clicking on the "Locked" hyperlink for the respective record. A locked record can only be printed.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Form Types

The Miscellaneous Forms section contains the following form types: BIP, BSP, CIA, FBA, Summary of Performance, Student Exit Form/Post School Outcomes, and Manifestation Determination. Form availability may change throughout the year (new forms added, old forms removed). Given the varying number and formats of the forms available, please refer to the Help files in the system for help in using a specific form.

Misc. Special Ed. Adobe Forms

At the bottom of the Misc. Form selection screen is a list of misc. forms in Adobe pdf format. Single-left click on the link of the name of the desired form to view the form. The form allows for data to be entered in the fields of the form, printed, and/or saved to your computer's hard drive (or network drive). For more information on using Adobe, see the section below regarding Using Adobe.

Reporting

The Student Name and ID are displayed underneath the black screen header. Reports that are related to a single student will print based upon the Student ID listed on the screen.

Click the **AdHoc Report Generator** button to configure a customized report with your desired fields, search criteria, etc.

For general reports, the report title is listed on the left side of the screen. The report description is listed on the right side of the screen. To view a general report, single-left click on the title/link of the report desired to be viewed. The report will be displayed in an html format that can then be printed.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

ADHOC Report Generator

There are three options in using the AdHoc Report Module: (1) creating your own Search/Report, (2) viewing Public Reports, and (3) viewing/editing previously created reports.

Create New Search (Creating your own search/report)

Creating your own search/report allows you to view information in the system with your desired fields and based up your desired search criteria. To create your own search/report, click the button labeled **Go** to the right of the text "Create New Report" located underneath the Features Toolbar on the main AdHoc screen. The system will then walk through the steps necessary to create your own search/report.

The steps to create your own search/report include (see below for details):

(1) Select the table and then the fields to display in your report
(2) Select the criteria fields that will filter the data in your report
(3) Select/enter the criteria definitions that will filter the data in your report
(4) Save or View your report

Public Reports

To view public reports available for you to view, click the drop-down box located underneath the text "Add/View Public Report". Click on the desired report and it will display in the drop-down box. Click the **Go** button located to the right of the drop-down box. The screen will refresh and the report name and details will display in the list of reports on the screen. **NOTE:** Public reports may only be edited by the user who created it.

Viewing / Editing Previously Created Reports

To view reports created, single-left click on the desired Report Name.

The Report Name is in the far-left column.
 * The second column contains the Description of the report.
 * The third column contains the Date the report was created.
 * The fourth column titled "Public" contains a “Yes” or “No” – “Yes” means that the report has been made available for all users within the system to import into their list of available AdHoc reports. “No” means that the report was created by you and is not marked as Public and therefore is not available for other system users to import into their list of available.
 * The fifth column titled "Excel Report" contains a Yes or a No – “Yes” means that it is an Excel report and when you click the link to view the report, the report will open in Excel; “No” means that it is an html report and will be displayed in your internet browser.
 * The sixth column titled "Edit/Delete" will contain a single trash can icon or both a trash can icon and an edit icon. Selecting the trash can icon will delete the AdHoc report from your list of reports. Selecting the edit icon will allow you to edit the report information (see the Report Editing section below for more details). If an edit icon does not appear, this indicates that the report was added from the list of public reports and was therefore created by another user.

To edit an existing report, the edit icon will display in the Edit/Delete column for each report that you created. You may edit/modify any reports that you created. Click on the edit icon for the desired report to edit your report.

To **create a new report** or **edit an existing report**, follow these steps:

Step 1: SELECTING FIELDS TO DISPLAY ON REPORT

Step 1a: SELECT TABLE TO USE FOR THE REPORT

Each table available to report on is contained on the Step 1 screen. Select the desired table from the **“Data Category”** listbox (e.g., Student Profile). Once a table is selected the list of available fields to select for your report will appear in the box below. **Reporting Tips:** You will nearly always want your report to contain fields from the Student Profile table, particularly if you want the Student Name or Student ID to display on the report.

Step 1b: SELECT DATA FIELDS TO BE DISPLAYED IN THE REPORT

To select the fields to display on your report, click (highlight) the desired field(s) and select the right arrow button (i.e., →) on the right side of the field display box. This action will place the field(s) in the right-most box under the “Data To Be Displayed In Report” label. The order of the fields listed in this box represents the column position (and sort order) that the fields will be displayed. If you desire to change the order of how the fields display, click (highlight) the field to move and select the up (i.e., ↑) and down (i.e., ↓arrow buttons respectively until the field is in the desired position. To remove a field from the list of fields for a report, click (highlight) the field and then select the left arrow button (i.e., ←) on the right side of the field display box.

NOTES: (1) The report sort order will be sorted in the order of how the fields are displayed in the selected fields box. **(2)** The Program Code field will appear on all reports.

You can view a report with fields from multiple tables. To add a field from one of the other available tables, select a new table in the Data Category listbox. The box below will refresh with the fields available in the selected table. Repeat the steps above to select and order the fields as desired.

Click the **Next** button to move to the next step/screen to build your report.

To return to the AdHoc selection screen, click the button labeled **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Step 2: SELECT REPORT CRITERIA

Selecting the Report Criteria means that you are selecting to view a sub-set of the entire data set. The criteria are what you use to filter the entire data set down to the sub-set that you want to view. **NOTE:** A minimum of one criteria field must be selected.

Step 2a: SELECT TABLE TO USE FOR CRITERIA

Each table available to use in setting the criteria for the report is contained on the Step 2 screen. Select the desired table from the **"Data Category"** listbox (e.g., Student Profile). Once a table is selected the list of available fields to select for your report will appear in the box below

Step 2b: SELECT DATA FIELDS TO BE USED AS CRITERIA

To select the fields to use as a criteria on your report, click (highlight) the desired field(s) and select the right arrow button (i.e., ->) on the right side of the field display box. This action will place the field(s) in the right-most box under the "Fields To Be Used For Your Criteria" label. To remove a field from the list of fields for a report, click (highlight) the field and then select the left arrow button (i.e., <-) on the right side of the field display box.

You can use fields from multiple tables for your report criteria. To add a field from one of the other available tables, scroll on the field selection screen until the table title/link is displayed. Single-left click on the link. The screen will refresh and the fields available in the selected table will also display on the screen. Select the desired fields to display on the report as you did in the first table.

Click the **Next** button to move to the next step/screen to build your report.

To return to the AdHoc selection screen, click the button labeled **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Step 3: CREATE CRITERIA STATEMENT

Each field that you selected to use as a criteria is displayed in the order that you selected it. To the right of the field name is a drop-down box. Click on the drop-down box and select the desired logic statement (see more about using the logic statements below). To the right of the drop-down box will be another text field, drop-down box, or checkbox. In that box, type or select the desired criteria filter (e.g. Male).

Click the **Next** button to move to the next step/screen to build your report.

To return to the AdHoc selection screen, click the button labeled **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Using Criteria in your reports

As defined above, using criteria will allow you to view a sub-set of your data. If you want a list of all of the data, then leave the criteria fields blank and skip this step (click the Next button). An example of this is if you want a list of all of the students with their birth date.

Most of the time you will want to view the data with a criteria. An example of this type of report is if you desire to view a list of all of the Female students. Using criteria can become complex when you want to view a report of all Female students whose Primary Language is Spanish and their Type of Meeting - Initial for all current IEPs.

Logic Statement Definitions

- **Equal To** - will filter the data that ONLY Equals the text entered.
- **Not Equal To** - will filter the data that DOES NOT EQUAL the text entered.
- **Contains** - will filter the data that CONTAINS the text entered. For example, if Smith is entered, then you will return all Students with the name Smith, as well as Smithfield, etc.
- **Less Than** - will filter the data to all dates or numbers less than the one entered. For example, for dates prior to (less than) July 15th (up to July 14th), then enter 07/15/2008 in the textbox. If you want Less Than "Or Equal to" July 15th, then enter 07/16/2008 in the textbox.
- **Greater Than** - will filter the data to all dates or numbers greater than the one entered. For example, for dates after (greater than) July 15th (July 16th on), then enter 07/15/2008 in the textbox. If you want Greater Than "Or Equal to", then enter 07/14/2008 in the textbox.

Criteria Filter Selection

In the Student Profile Module, if the field is a:
- Drop-down selection box - drop-down box will be displayed for the criteria filter selection field.
- Text box or Memo boxes - type in the desired criteria filter word. The word will need to match those used in the Student Profile Module else the report will not display the correct data.
- Checkboxes - if you want all of the fields that contain a checkmark, then check the checkbox on the Criteria selection screen. If you want all of the fields that do not contain a checkmark, then select Not Equal To and enter a checkmark in the checkbox.
- Date - enter the date in the same format as on the Student Profile screen. A calendar tool can be used to select the date in the correct format.

To return to the AdHoc selection screen, click the button labeled **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Step 4: SAVE/VIEW NEW REPORT

Save the report by clicking the **Save & View Report** button at the bottom of the screen. You will need to enter a Report Name in the "Report Search Name" textbox. Use a brief description of the report for the report name (e.g., All Female Students). You may enter a more detailed description of the report in the second field labeled "Report Description".

To create your report so that it will be displayed/exported to Excel, select the checkbox (so that it contains a checkmark) to the right of the field label "Export to Excel".

If you want to allow your report to be made available for other system users to view (i.e., public report), select the checkbox (so that it contains a checkmark) to the right of the field label "Available to Public".

You can **View** your report by clicking the **Just View Report** button. The report will then be displayed in html. You can print the results using the browser's Print function or you can return to the Step 4 screen by clicking the Back button on your browser's toolbar. When using this option, the report will not be saved for later recall.

If you need to **Edit** your report fields or criteria, ensure that your report is saved. Return to the AdHoc selection screen. Locate your new report in your report listing and then click the Edit icon for that report.

To return to the AdHoc selection screen, click the button labeled **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Delete An Existing Report

To delete a report, click on the Trash Can for the desired report to delete. The screen will refresh and the report will no longer be displayed in the list.

Note about deleting Public Reports: If the Public Report you want to delete was NOT created by you, then the report will still be available in the list of "Available Public Reports". If you created the Public Report, then the report will no longer be available to anyone else in the system after you have deleted it.

To return to the Reporting screen, click the button labeled **Select** located on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Report Editing

The edit screen, when first viewed, defaults to the Report Information screen (i.e., the Step 4 screen when building your report/search). To navigate to the other areas of the report, use the Screen Selection Navigation toolbar, located underneath the Features Toolbar.

When editing a report, you will need to save the changes you make in each area using the **Save** button on the Features Toolbar (note that it is a Save button instead of a Next button). The screen will be refreshed and displays a message that your data has been updated. But, you will not automatically move to the next step. (Therefore, if you only need to make changes to the criteria, for example, then you will not need to click through each remaining step to do that). If you do want to make changes to multiple areas, then use the Screen Selection Navigation toolbar to move to the other area.

The editing screens operate similar to the Steps discussed above. Please refer to the corresponding area above for information about editing a report.

Medicaid Tracking

Medicaid Selection Screen

On the Medicaid selection screen, the list of all of the providers associated with the student is displayed. The student header is displayed at the top of the list.

To **Add** a new Provider, single-left click the hyperlink titled **Add New Provider**. Select the Provider Type in the drop-down box and then click the **Select Provider Type** button. A second box will display labeled "Practitioner's Name". Select the Practitioner's Name from the drop-down box and then click the **Add New Provider** button at the bottom of the screen. **NOTE:** If a provider is not listed in the Practitioner's Name drop-down list, contact your Primary Contact to have the provider added to the system.

To **Delete** a Provider, single-left click on the Trash Can icon located on the left of each Provider Name. The screen will refresh after each deletion. **NOTE:** When deleting a provider, all individual provider logs for that provider for that student will also be deleted.

At the bottom of the Medicaid Selection screen is a link labeled "View/Edit IEP DSC Services (For In-Force IEP)". Selecting this link will allow users to view all SPED and Related Services as included in a student's In-Force IEP, as well as, mark/indicate which services are DSC (Direct Service Claim) services. Marking the appropriate services as DSC services will enable users to generate a report that allows identifying any discrepancies between DSC services indicated in the IEP and the actual services provided. The link for this report is located immediately below the aforementioned link and is labeled "Print IEP/Medicaid DSC Services Discrepancy Report".

NOTE: There is a "Medicaid Provider" group available on the Login screen. For users that login under this group, only the Medicaid module feature will be available.

Medicaid Add Provider Log/Notes Screen

To **Create a New Provider Log/Notes** document for the student's provider, click the **Add New Log** button at the bottom of the screen. A new log with today's date will appear on the screen (top of the list). The new service log/notes document will automatically load data from the Student Profiles, In-Force IEP, Providers and System Configuration areas.

Specific data loaded from the Student Profile module include: student's name, date of birth, gender, NPI code and AHCCCS ID number.

Specific data loaded from the student's In-Force IEP include: the IEP meeting date, categories of eligibility, all special education and related services marked as DSC, and all student goals marked as DSC.

Specific data loaded from the Provider entry area include: provider's name, NPI code and AHCCCS ID number.

Specific data loaded from the system configuration screen include: District's NPI code and AHCCCS ID number.

To **Edit a Provider Log/Notes** document for the student's provider, click the log date.

To **Print** a Provider's log/notes document (**that does not include the clinical notes**), single-left click on the Printer icon located to the right of the Created Date/Time under the column labeled "Print w/o Notes". The printed format of the document will display.

To **Print** a Provider's log/notes document (**that includes the clinical notes**), single-left click on the Printer icon located to the right of the Created Date/Time under the column labeled "Print w/ Notes". The printed format of the document will display.

When adding and editing a Provider log/notes documents, please note the following:

- A Log can only be added if an In-Force IEP exists for the student.
- Only an Administrator, Group Administrator or the user who created the log/notes document can update it. If the user is not one of these users, the link to edit the log is not available.
- Only an Administrator, Group Administrator or the user who created the Log can unlock it.
- Only an Administrator, Group Administrator or the user who created the Log can delete it. If not one of these users, deleting is denied.

To return to the selection screen, click the button labeled **Select** on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Medicaid Update Provider Log/Notes Screen

To **Create** a new provider log/notes entry for the current provider log/notes document, click the **Add Log Entry** button at the bottom of the screen. A new log entry with today's date will appear on the screen (top of the list).

To **Edit** a provider log/notes entry, make the desired updates and then click the **Update** button.

To **Print** a Provider's log/notes document (***that <u>does not</u> include the clinical notes***), click on the Print icon without the plus symbol located in the top-left corner of the screen (e.g., Print). The printed format of the document will display.

To **Print** a Provider's log/notes document (***that <u>does</u> include the clinical notes***), click on the Print icon <u>with the plus</u> symbol located in the top-left corner of the screen (e.g., + Print). The printed format of the document will display.

When adding and editing a log/notes entry, please note the following:

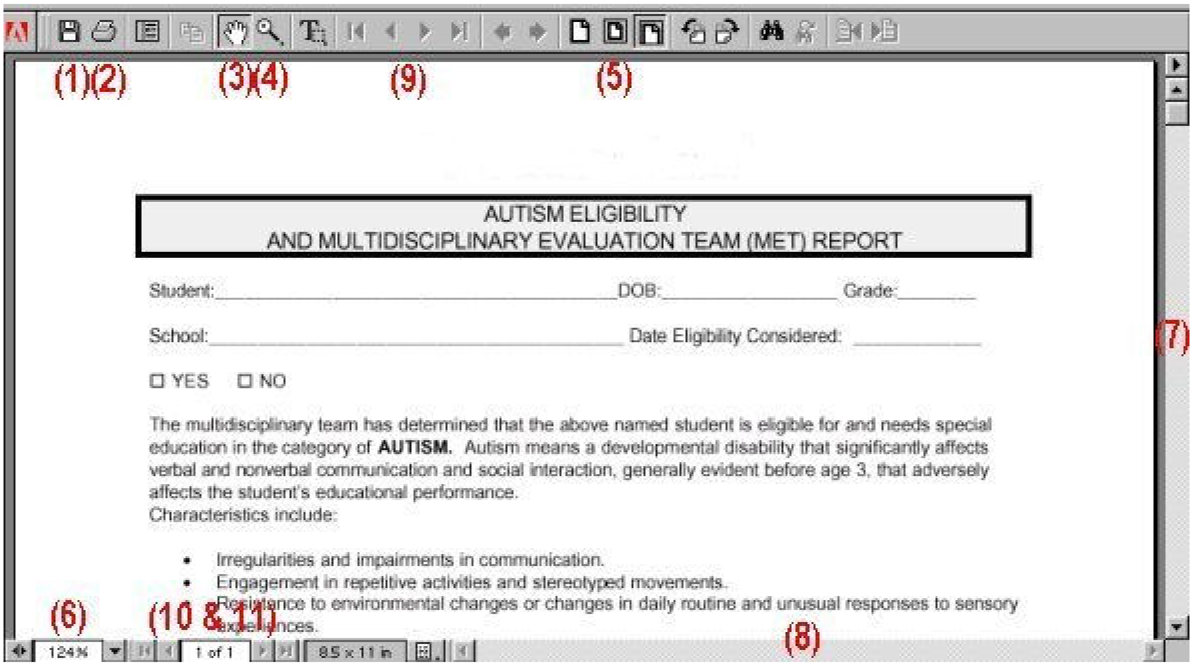
- Deleting of entries is limited to the user that created the entry or ADMINISTRATOR users.
- Goals displayed in the entry lines are pulled from Student Goals that are marked as Medicaid/DSC goals on the In-Force IEP and these goal statements are listed at the top of the form.
- Services are pulled from Student Services (both Special Ed. and Related) that are marked as DSC on the student's In-Force IEP.
- CPT codes are limited based on Provider Type and are displayed at the bottom of the data entry screen.

To return to the selection screen, click the button labeled **Select** on the Features Toolbar.

To return to the Main Menu, click the button labeled **Main Menu** located in the Navigation Toolbar in the upper right-hand corner of the screen.

Using Adobe Acrobat

When the link is selected for one of the reports or forms that is saved in an Adobe pdf format, the browser will launch (open) Adobe Acrobat inside of the browser. An Adobe Acrobat toolbar will be displayed underneath all of the browser's toolbars. (**NOTE:** Adobe Acrobat reader must be installed on the PC.)



(1) **Save** – (Button with the disk – 1st on the left) Use to save the report/pdf file to your hard drive or disk.

(2) **Print** – (Button with the printer icon) Use to print the report/pdf file to the printer.

(3) **Hand** – Use the button with the hand icon to click on the page and move it around.

(4) **Zoom** – Use the magnifying glass icon to click on the page zoom in and out. (5) Click on one of the three buttons with a different-sized page to view the page at Actual Size, Fit in Window, and Fit Width (respectively). (6) The zoom percentage is located on the bottom toolbar on the far left.

(7) **Scrolling** – Use the scroll bar on the right side of the browser to scroll down and view the remaining part of the page (depending on the zoom view). (8) The scroll bar located on the bottom toolbar scrolls left and right.

(9) **Navigating Pages** – On the top Adobe toolbar, there are four buttons with triangles on them. From left to right, the buttons move the pages to **First**, **Previous**, **Next**, and **Last**. (10) On the bottom toolbar, there are smaller versions of the **First**, **Previous**, **Next**, and **Last** buttons. (11) In between the Previous and Next buttons is a page locator. It indicates the page number currently viewed and then the total number of pages in the document.

Exiting the Adobe View of the Report/Form

The **Back** button on your Internet Explorer toolbar must be used in order to exit the report/pdf file and return to the Main Menu screen. **DO NOT USE THE Terminate (X) button in the top right-hand corner of the browser window to exit the report/pdf file.** This will exit the entire e-IEP PRO system.