
ProgressBook SpecialServices User Guide



ProgressBook SpecialServices User Guide

(This document is current for v13.3.1 or later.)

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Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook SpecialServices User Guide* have been made.

Product Version	Heading	Page	Reason
13.3.1	Entire Guide	N/A	Updated all references to Central to read CentralAdmin.
13.3.1	Entire Guide	N/A	Updated all screen shots to show the application quick launch icon in the banner for suite navigation.
13.3.1	<i>"Access SpecialServices"</i>	3	Updated text and image to show revised GradeBook banner including suite navigation.
13.3.1	<i>"Sign Out of SpecialServices"</i>	5	Updated image to show new CentralAdmin sign out screen.
13.3.1	<i>"Navigate ProgressBook"</i>	9	Added new section explaining ProgressBook suite navigation.
13.3.1	<i>"Verify EMIS"</i>	70	Updated description of functionality to reflect new behavior of the Verify EMIS button and EMIS Data Collection Form.
13.2.0	Entire Guide	N/A	Updated all screen shots that include the Web site banner to show the new downward arrow instead of the Logout link.
13.2.0	<i>"Access SpecialServices"</i>	3	Updated sign in and sign out procedures to reflect ProgressBook Central sign in functionality.
13.2.0	<i>"Change Districts"</i>	8	Added section to describe how to switch between districts.
13.2.0	<i>"System Time Out"</i>	48	Deleted note stating user has three attempts to sign in after automatically being signed out without saving data.
13.1.0	<i>"Sign In to SpecialServices"</i>	4	Updated login screen shot to show correct formatting of product name.
13.1.0	<i>"Rename Open Tasks"</i>	36	Added section describing how to rename an open task using the Change Name link.
13.1.0	Entire Guide	N/A	Updated Open Tasks screen shots to show Change Name link.
13.1.0	<i>"EMIS Related Services Report"</i>	109	Updated Field Name options to reflect name formatting change.
13.0	<i>"Open Pages"</i>	43	Updated information about toolbars on the Page Edit screen and updated screen shot to show Check Spelling.
13.0	<i>"Read-Only and Editable Fields on Web Forms"</i>	44	Removed information about PDFs.
13.0	<i>"Expandable Fields on Web Forms"</i>	44	Added information about expandable fields for Web forms.
13.0	<i>"Spell Check for Web Forms"</i>	45	Added information about spell checking Web forms.

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Product Version	Heading	Page	Reason
13.0	<i>"Save Pages"</i>	46	Deleted information about PDF forms and updated screen shots to show Check Spelling.
13.0	<i>"Navigate to Pages on the Quick Task Menu"</i>	48	Updated screen shot to show Check Spelling.
13.0	<i>"Import Parent Information"</i>	50	Updated screen shot to show Check Spelling.
13.0	<i>"Import Phrases from Bank"</i>	51	Updated screen shot to show Check Spelling.
13.0	<i>"Rename Pages"</i>	56	Updated screen shot to show Check Spelling.
13.0	<i>"Lock Pages"</i>	58	Updated screen shot to show Check Spelling.
13.0	<i>"Delete Pages"</i>	59	Updated screen shot to show Check Spelling.
13.0	<i>"Complete Pages"</i>	68	Updated screen shot to show Check Spelling.
13.0	<i>"EMIS Related Services Report"</i>	109	Added information about the columns added to the Field list.
13.0	<i>"EMIS"</i>	125	Updated screen shot to show correct default dates.
13.0	<i>"View the EMIS Data Collection Form for Completed Tasks"</i>	127	Updated screen shot to show correct default dates. Updated text with correct default dates.
12.6	<i>"Open Pages"</i>	43	Updated screen shot to show Print & Save button and the Save Form and Save & Close buttons resized.
12.6	<i>"Expandable Fields on Web Forms"</i>	44	Updated screen shot to show Print & Save button and the Save Form and Save & Close buttons resized.
12.6	<i>"Save Pages"</i>	46	Added information about the Print & Save button.
12.6	<i>"Close Pages"</i>	48	Added information about the Print & Save option.
12.6	<i>"Import Parent Information"</i>	50	Updated screen shot to show Print & Save button and the Save Form and Save & Close buttons resized. Added information about the Print & Save option.
12.6	<i>"Import Phrases from Bank"</i>	51	Updated screen shot to show Print & Save button and the Save Form and Save & Close buttons resized.
12.6	<i>"Rename Pages"</i>	56	Updated screen shots to show Print & Save button and the Save Form and Save & Close buttons resized. Added information about the Print & Save option.
12.6	<i>"Lock Pages"</i>	58	Updated screen shot to show Print & Save button and the Save Form and Save & Close buttons resized.
12.6	<i>"Delete Pages"</i>	59	Updated screen shot to show Print & Save button and the Save Form and Save & Close buttons resized.
12.6	<i>"Complete Pages"</i>	68	Updated screen shot to show Print & Save button and the Save Form and Save & Close buttons resized.
12.6	<i>"Completed Tasks"</i>	73	Updated screen shot to show IEP Summary and Completed Tasks links.
12.6	<i>"Rename Completed Tasks"</i>	74	Updated screen shot to show IEP Summary and Completed Tasks links.
12.6	<i>"View Archived Forms"</i>	75	Updated screen shots to show IEP Summary and Completed Tasks links.
12.6	<i>"Rename Archived Forms"</i>	77	Updated screen shots to show IEP Summary and Completed Tasks links.
12.6	<i>"View IEP Summary Report"</i>	78	Added information about the IEP Summary Report.

Product Version	Heading	Page	Reason
12.5	<i>"Find the Information You Need"</i>	1	Added information about locating Help in SpecialServices.
12.5	<i>"Use SpecialServices Help"</i>	2	Added information about Help in SpecialServices.
12.5	<i>"Sign In to SpecialServices"</i>	4	Updated screen shot to show Help link.
12.5	<i>"Sign Out of SpecialServices"</i>	5	Updated screen shots to show Help link.
12.5	<i>"Select Students"</i>	8	Updated screen shots to show Help link.
12.5	<i>"Task Queue"</i>	13	Updated screen shots to show Help link.
12.5	<i>"Class List Option in the Narrow Results Area"</i>	15	Updated screen shot to show Help link.
12.5	<i>"Student Search Option in the Narrow Results Area"</i>	16	Updated screen shot to show Help link.
12.5	<i>"Priority Option in the Narrow Results Area"</i>	17	Updated screen shot to show Help link.
12.5	<i>"Due Date Option in the Narrow Results Area"</i>	19	Updated screen shot to show Help link.
12.5	<i>"Task Group Option in the Narrow Results Area"</i>	21	Updated screen shot to show Help link.
12.5	<i>"View Tasks"</i>	22	Updated screen shot to show Help link.
12.5	<i>"Open Tasks"</i>	25	Updated screen shot to show Help link.
12.5	<i>"Modify Student Properties"</i>	26	Updated screen shot to show Help link.
12.5	<i>"Creating a New Task"</i>	31	Updated screen shot to show Help link.
12.5	<i>"Create a New Task from an Existing Task"</i>	33	Updated screen shot to show Help link.
12.5	<i>"Creating a New Page"</i>	37	Updated screen shots to show Help link.
12.5	<i>"Creating a New Page from an Existing Page"</i>	38	Updated screen shots to show Help link.
12.5	<i>"Add Optional Forms"</i>	40	Updated screen shot to show Help link.
12.5	<i>"Open Pages"</i>	43	Updated screen shots to show Help link and to show PDF form.
12.5	<i>"Save Pages"</i>	46	Updated screen shots to show Help link and to show PDF form.
12.5	<i>"Navigate to Pages on the Quick Task Menu"</i>	48	Updated screen shot to show Help link.
12.5	<i>"Import Parent Information"</i>	50	Updated screen shot to show Help link.
12.5	<i>"Import Phrases from Bank"</i>	51	Updated screen shot to show Help link.
12.5	<i>"Add Standards"</i>	54	Updated screen shots to show Help link.
12.5	<i>"Rename Pages"</i>	56	Updated screen shots to show Help link.
12.5	<i>"Lock Pages"</i>	58	Updated screen shots to show Help link.
12.5	<i>"Delete Pages"</i>	59	Updated screen shots to show Help link.
12.5	<i>"Add Attachments"</i>	60	Updated screen shots to show Help link.
12.5	<i>"Add Tasks as Priority Tasks on the Task Queue Screen"</i>	64	Updated screen shot to show Help link.

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Product Version	Heading	Page	Reason
12.5	<i>"Print Student Forms"</i>	65	Updated screen shots to show Help link and to show PDF form.
12.5	<i>"Complete Pages"</i>	68	Updated screen shots to show Help link and to show Web form.
12.5	<i>"Verify EMIS"</i>	70	Updated screen shot to show Help link.
12.5	<i>"Complete Tasks"</i>	71	Updated screen shot to show Help link.
12.5	<i>"Completed Tasks"</i>	73	Updated screen shot to show Help link.
12.5	<i>"Set Up User Banks"</i>	81	Updated screen shot to show Help link.
12.5	<i>"Reports Screen"</i>	90	Updated screen shots to show Help link.
12.5	<i>"Open Tasks Report"</i>	92	Updated screen shots to show new logo in Report Viewer and Help link.
12.5	<i>"Completed Tasks Report"</i>	95	Updated screen shots to show new logo in Report Viewer and Help link.
12.5	<i>"Due Date Report"</i>	98	Updated screen shots to show new logo in Report Viewer and Help link.
12.5	<i>"Accommodations Report"</i>	101	Updated screen shots to show new logo in Report Viewer and Help link.
12.5	<i>"Student Demographics Report"</i>	105	Updated screen shots to show new logo in Report Viewer and Help link.
12.5	<i>"EMIS Related Services Report"</i>	109	Updated screen shots to show new logo in Report Viewer and Help link.
12.5	<i>"EMIS Special Ed Events Report"</i>	113	Updated screen shots to show new logo in Report Viewer and Help link.
12.5	<i>"Report Builder Reports Available Features"</i>	117	Added information about Help icon.
12.5	<i>"Print Progress Reports"</i>	119	Updated screen shots to show Help link.
12.5	<i>"Print Blank Forms"</i>	121	Updated screen shots to show Help link.
12.5	<i>"EMIS"</i>	125	Updated screen shot to show ReadingExempt, WritingExempt, MathExempt, ScienceExempt and CitizenshipExempt and to show Help link.
12.5	<i>"View the EMIS Data Collection Form for Completed Tasks"</i>	127	Updated screen shot to show ReadingExempt, WritingExempt, MathExempt, ScienceExempt and CitizenshipExempt and to show Help link.
12.4	<i>"Automatic Sign Out"</i>	6	Added information about logging in to SpecialServices after the session expires.
12.4	<i>"Open Pages"</i>	43	Added information about the differences of toolbars for Web and PDF forms and added a screen shot.
12.4	<i>"Read-Only and Editable Fields on Web Forms"</i>	44	Added information about read-only and editable fields on Web forms.
12.4	<i>"Expandable Fields on Web Forms"</i>	44	Added information about multiline text fields on Web forms.
12.4	<i>"Save Pages"</i>	46	Added information about save buttons for Web forms.
12.4	<i>"Import Parent Information"</i>	50	Updated screen shot to show a Web form.
12.4	<i>"Import Phrases from Bank"</i>	51	Updated screen shot to show a Web form.

Product Version	Heading	Page	Reason
12.4	<i>"Rename Pages"</i>	56	Updated screen shots to show Web forms.
12.4	<i>"Lock Pages"</i>	58	Updated screen shot to show a Web form.
12.4	<i>"Delete Pages"</i>	59	Updated screen shot to show a Web form.
12.4	<i>"Verify EMIS"</i>	70	Updated screen shot to show a Web form.
12.4	<i>"View the EMIS Data Collection Form for Completed Tasks"</i>	127	Updated screen shot to show a Web form.
12.3	Entire Guide	N/A	Updated screen shots with new SpecialServices logo and the removal of the version number in the banner.
12.3	<i>"Sign In to SpecialServices"</i>	4	Updated screen shot to show, "This site works best with IE 8 and above."
12.3	<i>"Navigate to Pages on the Quick Task Menu"</i>	48	Added note about the Quick Task Menu and Banner remain in the open state.
12.3	<i>"Report Builder Reports"</i>	89	Added information about the EMIS Special Ed Events Report.
12.3	<i>"Open Tasks Report"</i>	92	Updated screen shots to show the updated Report Viewer header.
12.3	<i>"Completed Tasks Report"</i>	95	Updated screen shots to show the updated Report Viewer header.
12.3	<i>"Due Date Report"</i>	98	Updated screen shots to show the updated Report Viewer header.
12.3	<i>"Accommodations Report"</i>	101	Updated screen shots to show the updated Report Viewer header.
12.3	<i>"Student Demographics Report"</i>	105	Updated screen shots to show the updated Report Viewer header.
12.3	<i>"EMIS Related Services Report"</i>	109	Updated screen shots to show the updated Report Viewer header.
12.3	<i>"EMIS Special Ed Events Report"</i>	113	Added the EMIS Special Ed Events Report.
12.3	<i>"Print Blank Forms"</i>	121	Updated screen shot to show only one scroll bar on the right-side of the screen.

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Welcome to SpecialServices

SpecialServices focuses on the tasks special educators perform to identify, evaluate and monitor a student's progress in a special education program by providing the state and district forms necessary for each stage of the process. SpecialServices keeps the state required forms up-to-date, so districts can remain in compliance with state and federal laws. SpecialServices also contains a state reporting tool to extract information entered onto the forms for Individualized Education Plans (IEPs), Evaluation Team Reports (ETRs), Service Plans (SPs) and other required forms in the state mandated format. This information can then be imported into a district student information system (SIS) or state data collection tool.

Find the Information You Need

The following sources of information are available to assist you while you are using SpecialServices:

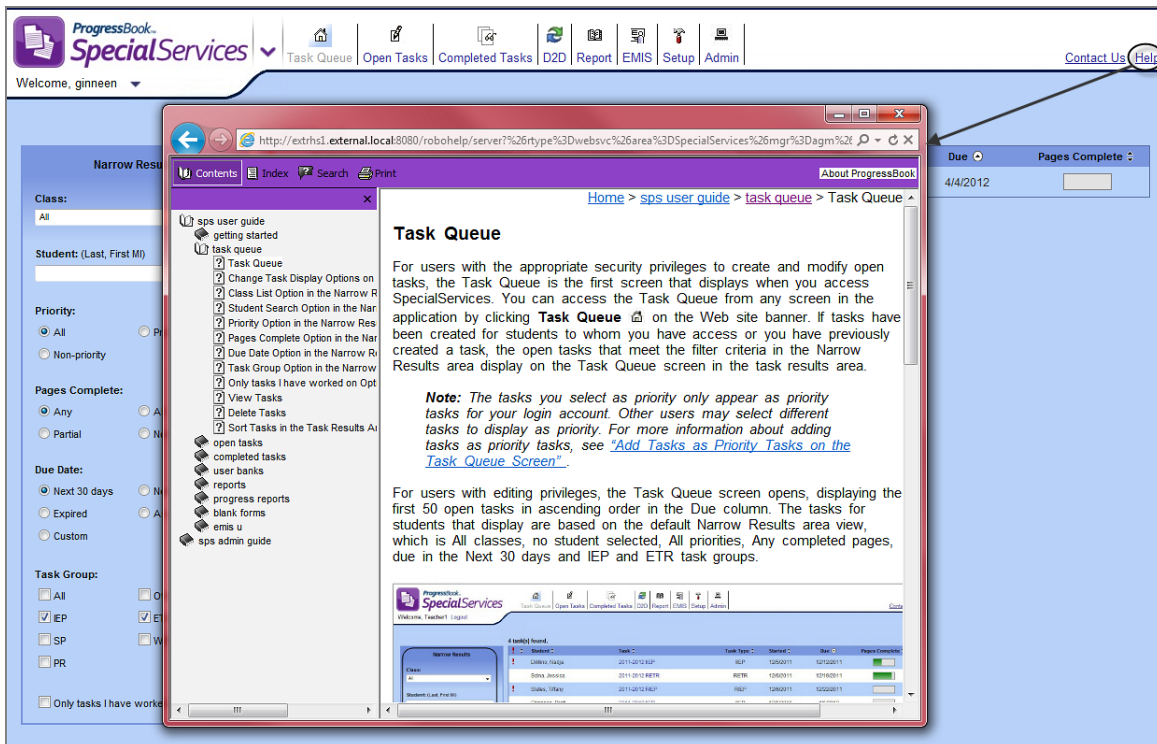
- **Tool Tips** – To view a description of a button or symbol, place your cursor over the icon.
- **SpecialServices Help** – Click the Help link on any screen to display information that describes the main task being performed on that screen.
- **SpecialServices Release Notes** – The release notes, presented in portable document format (PDF), must be viewed using Adobe Acrobat Reader, which can be downloaded for free from the Adobe Web site (www.adobe.com). You can print the file, if desired. You can access the release notes by going to the following:
<http://kb.progressbook.com/?cid=2&c=12&cpc=4g8RrmM35sBFoAQcTGf6RN4pxT02V06D72Ga04uQX0jn>.
- **SpecialServices User Guides** – These guides, presented in portable document format (PDF), must be viewed using Adobe Acrobat Reader, which can be downloaded for free from the Adobe Web site (www.adobe.com). You can print the files, if desired. You can access these guides by going to the following:
<http://kb.progressbook.com/?cid=2&c=12&cpc=4g8RrmM35sBFoAQcTGf6RN4pxT02V06D72Ga04uQX0jn>.
- **SpecialServices Forms Guide** – The guide, presented in PDF, must be viewed using Adobe Acrobat Reader, which can be downloaded for free from the Adobe Web site (www.adobe.com). You can print the file, if desired. You can access this guide by going to the following:
<http://kb.progressbook.com/?cid=2&c=12&cpc=4g8RrmM35sBFoAQcTGf6RN4pxT02V06D72Ga04uQX0jn>.
- **Knowledge Base Articles** – This tool provides additional information on frequently asked questions and known SpecialServices support resolutions. You can access these articles by going to the following:
<http://kb.progressbook.com/?cid=2&c=12&cpc=4g8RrmM35sBFoAQcTGf6RN4pxT02V06D72Ga04uQX0jn>.
- **Contact Us Link** – Click the Contact Us link on the banner to send an email to the SpecialServices Support Team. Use this feature to request support and provide valuable feedback on the SpecialServices application.

Use SpecialServices Help

Online Help provides overview, procedural and reference information about SpecialServices. View the help topic related to the screen you are viewing by clicking the Help link in the banner.

SpecialServices Help displays in a separate browser window where you can browse the Table of Contents for specific topic titles, search for information in the Index by using keywords or type a word or phrase in the Search field to return a list of possible help topics.

To print a help topic, click the Print icon located in the Navigation pane of the SpecialServices Help window, and then click **Print** on the Print window.

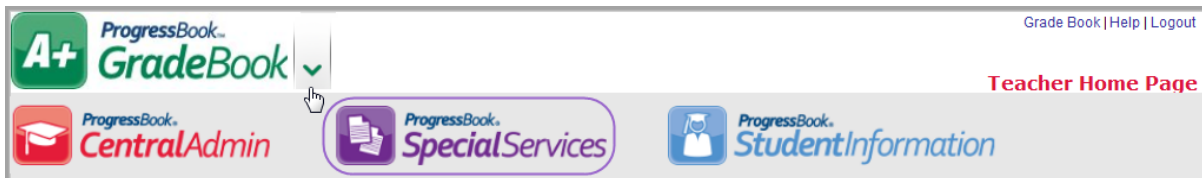


Help Link in SpecialServices


Access SpecialServices

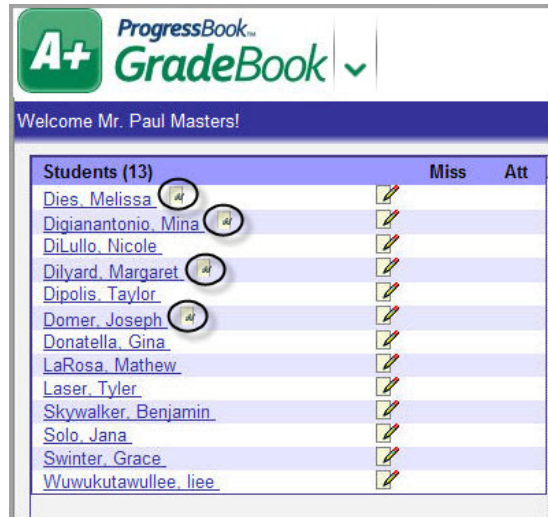
Before you start using SpecialServices, you must sign in. There are three ways to access SpecialServices:

1. If you are already logged in to another ProgressBook application, you can access SpecialServices by clicking the application quick launch icon in the banner beside the application's logo and clicking SpecialServices. SpecialServices opens in a new window or tab, depending on your browser settings.



SpecialServices Logo on GradeBook Banner Drop-Down List

2. Teachers in ProgressBook GradeBook with the security privileges to view or edit SpecialServices tasks can access the forms for their students by clicking  next to the student's name on the Class Dashboard. This icon displays for students with completed tasks in SpecialServices.



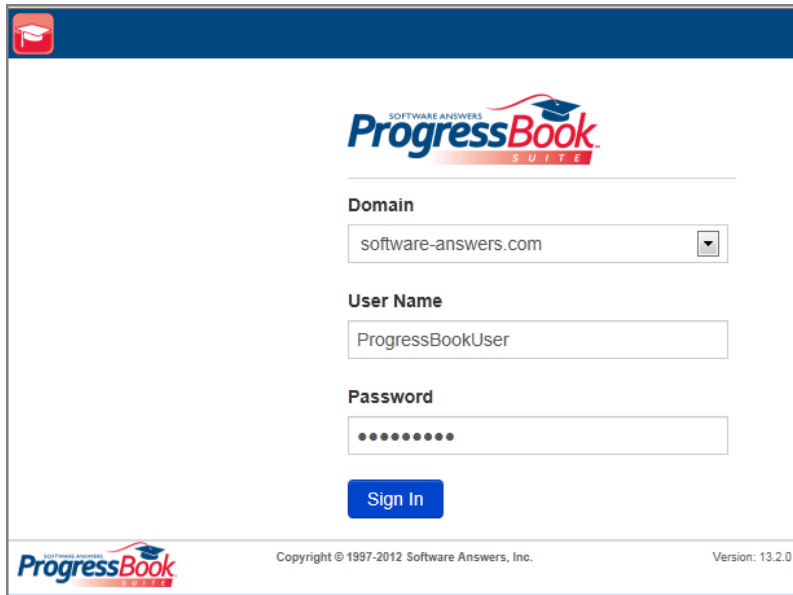
Access SpecialServices from Class Dashboard

3. If you are not already signed in to ProgressBook CentralAdmin or if your district provides stand-alone access to SpecialServices via a URL, you must sign in. See *“Sign In to SpecialServices.”*

Sign In to SpecialServices

You access SpecialServices by signing in from the ProgressBook CentralAdmin login screen.

1. In a Web browser, enter the URL provided by your district.
The ProgressBook CentralAdmin login screen displays.



ProgressBook CentralAdmin Login Screen

2. On the CentralAdmin login screen, in the Domain list, select your domain.

Note: Once you select a domain, the system remembers the last domain accessed on the current computer.

Note: If you do not select a domain, you receive the following message: “Please select your domain.”

3. In the User Name field, enter your user name.

Note: If you do not enter a user name, you receive the following message: “Please enter your user name.”

4. In the Password field, enter your password.

Note: By default, password requirements are eight characters with at least one uppercase letter, one lowercase letter, one number and one special character; however, your district may have different requirements.

Note: If you do not enter a password, you receive the following message: “Please enter your password.”

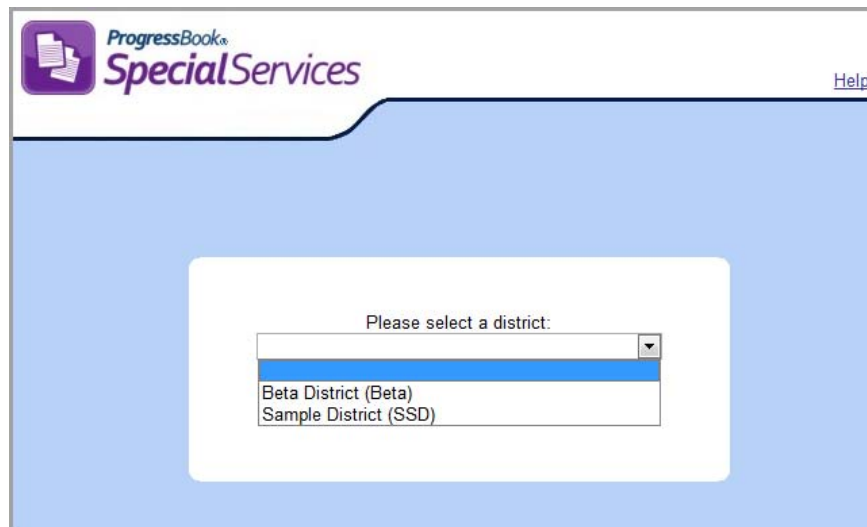
5. Click **Sign In**.

Note: Signing in to any ProgressBook application signs you in to all ProgressBook applications to which you have access.

If you have access to only one district, the home page displays, based on security as follows:

- For users with editing privileges, the Task Queue screen opens, displaying the first 50 open tasks in ascending order in the Due column. The tasks for students that display are based on the default Narrow Results area view, which is All classes, no student selected, All priorities, Any completed pages, due in the Next 30 days and IEP and ETR task groups.
- For users with read-only privileges, the Completed Tasks screen opens, enabling you to access the completed tasks for the students to whom you have access.
- For users with administrative privileges, the Administrator Home Page displays, enabling you to perform a variety of administrative functions. For more information, see the *ProgressBook SpecialServices System Manager Guide*.

If you have access to multiple districts, a district selection screen displays.



District Selection Screen

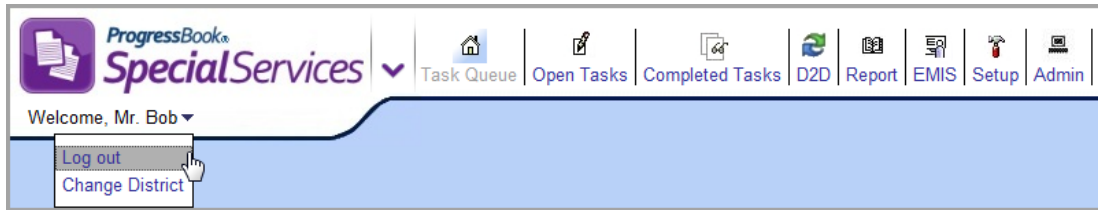
6. Select your **district** from the list.

Note: On subsequent visits to this screen, the district selection defaults to the last district selected by the signed in user on the current machine.

Sign Out of SpecialServices

It is recommended that you sign out of SpecialServices if you plan to leave your computer unattended for any length of time where someone might have access to it.

1. Hover over the Welcome message in the banner.
2. Select **Log out**.



Log Out Option

Note: The Change District option is only visible if you have access to more than one district.

The CentralAdmin sign out screen displays, confirming that you are signed out.



ProgressBook CentralAdmin Sign Out Screen

Note: Signing out of SpecialServices also signs you out of all ProgressBook applications to which you have access.

Note: Click Sign In to sign in again. For more information about signing in, see “Sign In to SpecialServices.”

Automatic Sign Out

To prevent unauthorized use, ProgressBook automatically signs you off after a period of inactivity, the length of which is defined by your system administrator. The timer calculating inactivity is reset each time you perform an activity anywhere in the ProgressBook suite.

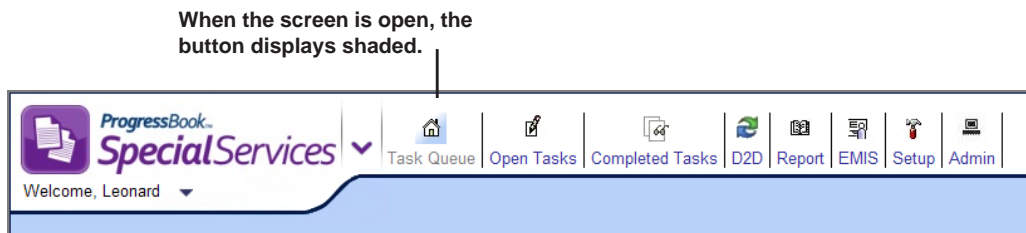
If you are editing a form in SpecialServices and try to save it but find that you are signed out of the ProgressBook suite due to inactivity, you are permitted to sign in again and resume working. The system saves the data entered on the form and performs the action based on the save option selected.

Note: There is an exception for the EMIS Data Collection Form for Students with Disabilities. If you are signed out due to inactivity while attempting to save information on that form, your information is not saved!

Note: Ensure that you save your form data frequently. If you are editing a form in SpecialServices and navigate away from the form or close it with unsaved changes and you are signed out due to inactivity, your form changes are not saved!









Navigate SpecialServices

The banner, which appears at the top of every screen, enables you to navigate to the main screens in SpecialServices. The screens you can access depend on the security role assigned to your user account. The banner contains the buttons described in “Banner Buttons.”



SpecialServices Banner

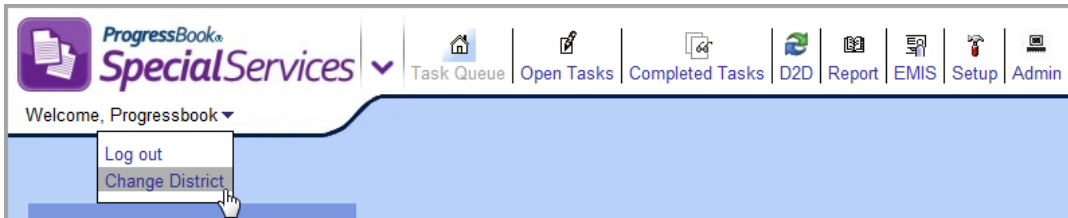
Banner Buttons

Buttons	Label	Description
	Task Queue	Displays the first 50 open tasks in ascending order in the Due column. The tasks for students that display are based on the default Narrow Results area view, which is All classes, no student selected, All priorities, Any completed pages, due in the Next 30 days and IEP and ETR task groups.
	Open Tasks	Enables you to work on a specific task for a student. You can create and edit the pages of a student’s task on this screen as well as start a new task.
	Completed Tasks	Displays the completed tasks for a student. You can view, but not edit, any tasks listed on this screen.
	D2D	Enables you to transfer a student’s forms to another district or import a student’s forms into your district. You must have district transfer security privileges to access this screen.
	Report	Enables you to run reports on the information in certain tasks. You can also access the Class Print screen to print progress reports and Print Blank Forms screen to print blank versions of certain forms.
	EMIS	Accesses the EMIS Tools from which you can, depending on your security role, run the EMIS Review Report, view or edit the completed EMIS Data Collection Form, build and process the EMIS Extract and view the EMIS transaction log.
	Setup	Enables you to set up User Banks.
	Admin	Accesses the Administrator Home Page. Only users assigned the School Administrator or Master role in ProgressBook GradeBook can access this screen.

Change Districts

If you have access to multiple districts in SpecialServices, you can switch between them at any time while signed in.

1. Hover over the Welcome message in the banner.
2. Select **Change District**.



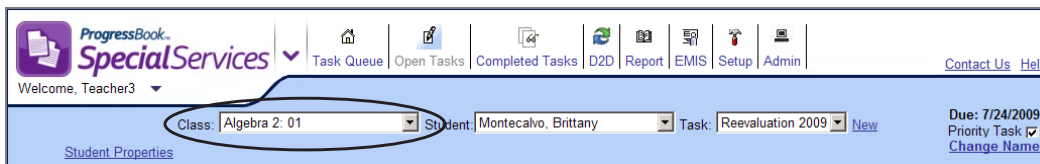
Change District Option

The District Selection screen displays, allowing you to select a different district to view. See “Sign In to SpecialServices” for more information on selecting a district.

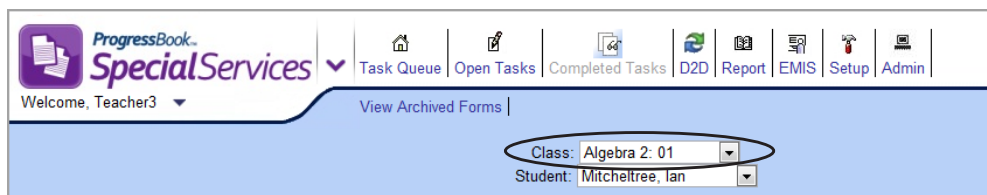
Select Students

The Open Tasks and Completed Tasks screens both display tasks for a single student. The search fields available for locating the student whose task(s) you want to view vary depending on the level of access assigned to your user account.

If you can only view those students in your assigned classes, the Class list displays. Select a **class** to populate the Student list with those students who are assigned to the class. You can then select the **student** whose tasks you want to view in the Student list.



Class List on Open Tasks Screen



Class List on Completed Tasks Screen

If you can view students in one or multiple schools and you have no classes assigned to you, the School list displays. You can perform the following steps to select the student:

1. Select a **school** in the Building list.

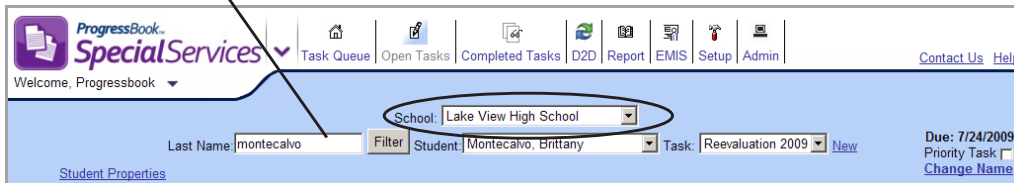
The Student list populates with those students who are assigned to the selected school.

- To further narrow your search, enter all or part of the **student's last name** in the Last Name field, and then click **Filter**.

The Student list populates with only the students whose last name matches or most closely matches the criteria entered in the Last Name field.

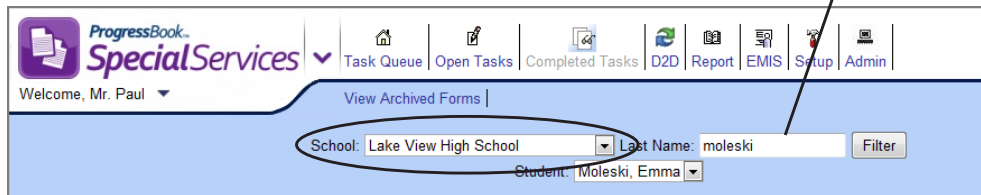
- Select the **student** in the Student list.

Search by student's last name.



School List and Last Name Search Field on Open Tasks Screen

Search by student's last name.



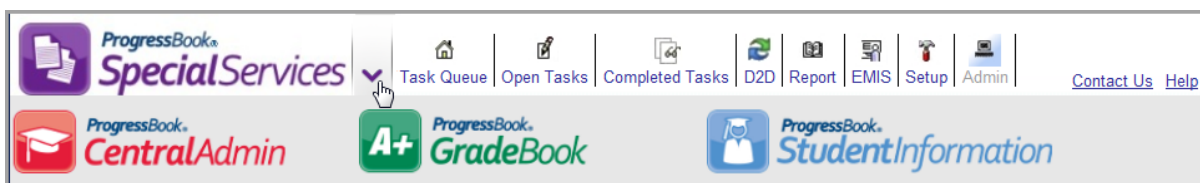
School List and Last Name Search Field on Completed Tasks Screen

Navigate ProgressBook

You can use the application quick launch to easily navigate between ProgressBook applications.

- In the banner, to the right of the SpecialServices logo, click the application quick launch icon.

In the application quick launch area, logos display for all other ProgressBook applications that are registered in CentralAdmin.



Application Quick Launch

- To open another application that you are authorized to use, click the application's logo. The application opens in another window or tab, depending on your browser's settings.

Note: To close the application quick launch without navigating to another application, click the application quick launch icon again, or click the screen anywhere outside the application quick launch area.

Special Education Process Flow

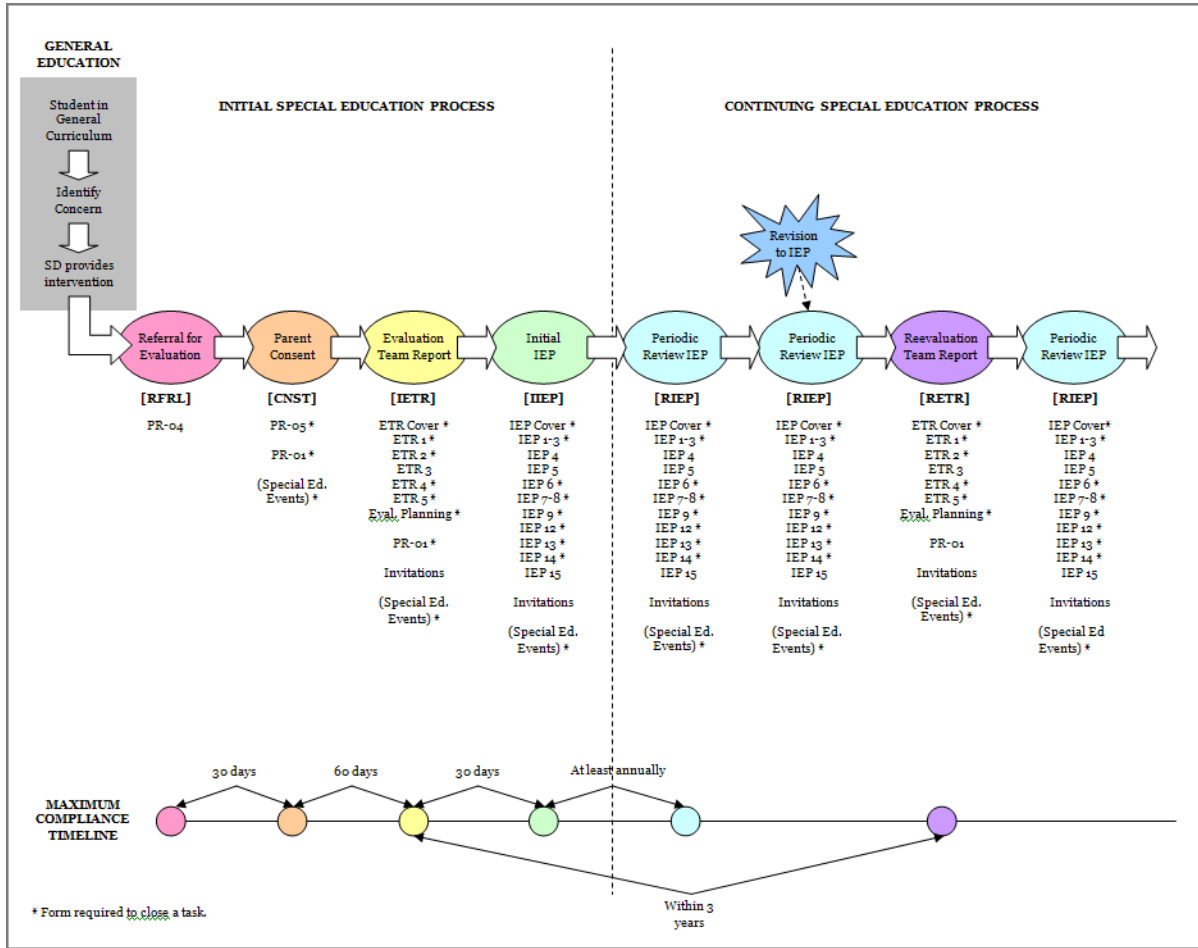
SpecialServices is designed to follow federal and state mandated time lines and procedures. To accommodate these requirements, SpecialServices uses tasks that correspond with special education events and contain required and optional forms to complete the task. For more information about each of the tasks, see “*SpecialServices Tasks.*”

In SpecialServices, an open task is the task in which the members of a special education team are editing the forms. Only users with the appropriate security privileges can view or edit open tasks; users with view-only access to SpecialServices cannot access open tasks.

Once the task is complete, a member of the team handling the task must complete the task to allow users with view-only access to view the effective version of the forms. You might complete a task to keep a historical copy of a draft form set, such as an IEP, or only when the effective version of the form set is implemented.


The last component of the special education process that SpecialServices provides is EMIS reporting. Certain tasks, such as an initial IEP or review ETR, are reported to the state to ensure compliance with the federal and state mandated standards and ensure funding of special education programs for the district. The EMIS Extract—as well as the EMIS reporting tools—only select data from completed tasks.

The following illustration shows the special education process flow, the corresponding tasks provided by SpecialServices and the forms associated with each task.



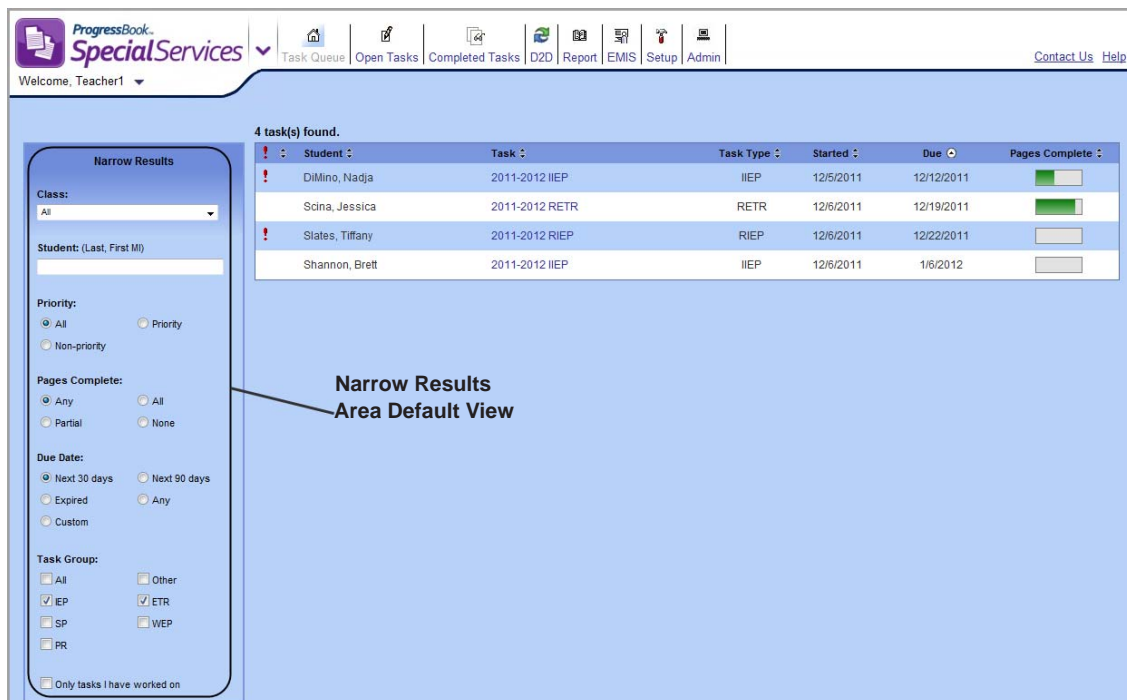
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Task Queue

For users with the appropriate security privileges to create and modify open tasks, the Task Queue is the first screen that displays when you access SpecialServices. You can access the Task Queue from any screen in the application by clicking **Task Queue**  on the banner. If tasks have been created for students to whom you have access or you have previously created a task, the open tasks that meet the filter criteria in the Narrow Results area display on the Task Queue screen in the task results area.

Note: *The tasks you select as priority only appear as priority tasks for your login account. Other users may select different tasks to display as priority. For more information about adding tasks as priority tasks, see “Add Tasks as Priority Tasks on the Task Queue Screen.”*

For users with editing privileges, the Task Queue screen opens, displaying the first 50 open tasks in ascending order in the Due column. The tasks for students that display are based on the default Narrow Results area view, which is All classes, no student selected, All priorities, Any completed pages, due in the Next 30 days and IEP and ETR task groups.



The screenshot displays the 'Task Queue' screen in the 'SpecialServices' application. The interface is divided into a top navigation bar, a left sidebar for 'Narrow Results', and a main content area for task results. The 'Narrow Results' sidebar includes filters for Class (set to 'All'), Student (empty), Priority (radio buttons for 'All', 'Priority', 'Non-priority'), Pages Complete (radio buttons for 'Any', 'Partial', 'None'), Due Date (radio buttons for 'Next 30 days', 'Next 90 days', 'Expired', 'Any', 'Custom'), and Task Group (checkboxes for 'All', 'Other', 'EP', 'ETR', 'SP', 'WEP', 'PR', and 'Only tasks I have worked on'). The main content area shows a table with 4 tasks found, with columns for Student, Task, Task Type, Started, Due, and Pages Complete. The table data is as follows:

Student	Task	Task Type	Started	Due	Pages Complete
DiMino, Nadja	2011-2012 IIEP	IIEP	12/5/2011	12/12/2011	<input checked="" type="checkbox"/>
Scina, Jessica	2011-2012 RETR	RETR	12/6/2011	12/19/2011	<input checked="" type="checkbox"/>
Slates, Tiffany	2011-2012 RIEP	RIEP	12/6/2011	12/22/2011	<input type="checkbox"/>
Shannon, Brett	2011-2012 IIEP	IIEP	12/8/2011	1/6/2012	<input type="checkbox"/>

Task Queue Screen Narrow Results Area Default View

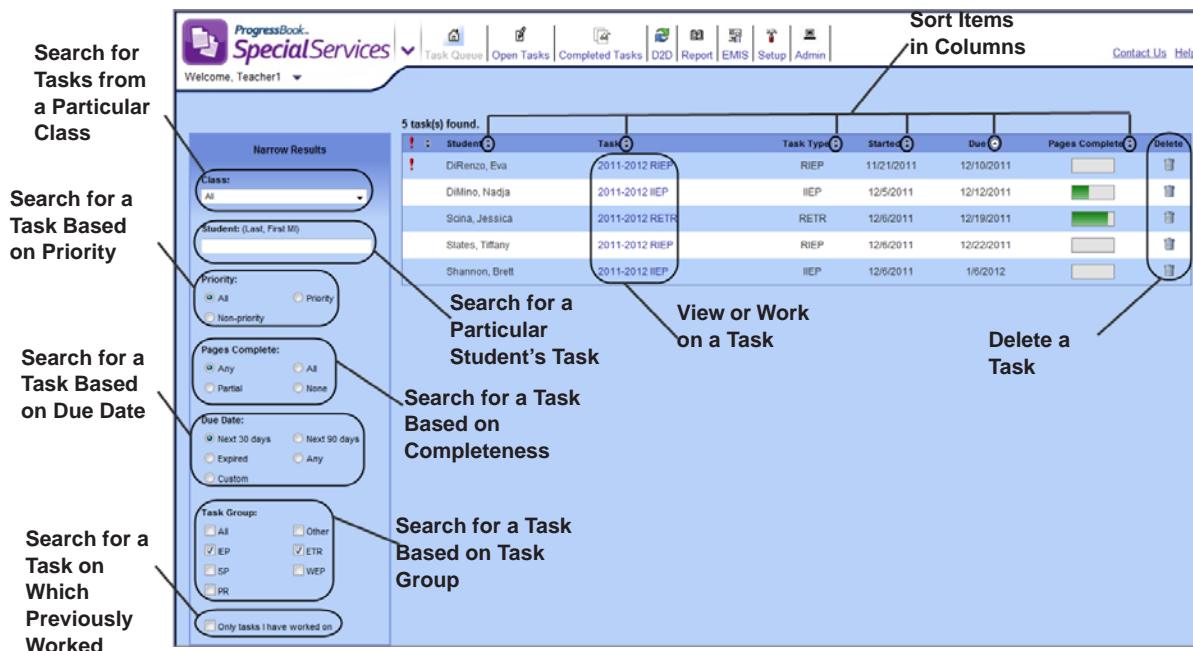
You can perform the following actions from the Task Queue screen:

- From the Narrow Results area, search for tasks for students from a particular class.
- From the Narrow Results area, search for tasks for a particular student.
- From the Narrow Results area, search for tasks based on priority.

- From the Narrow Results area, search for tasks based on completeness.
- From the Narrow Results area, search for tasks based on due date.
- From the Narrow Results area, search for tasks based on the task group.
- From the Narrow Results area, search for tasks on which you have previously worked.

Note: This is only available for tasks created or edited after the 12.2 release.

- From the task results area, view or work on a task previously created.
- From the task results area, sort items in the columns in ascending or descending order, except for the Delete column.
- From the task results area, delete a task, if you have the appropriate security privileges.

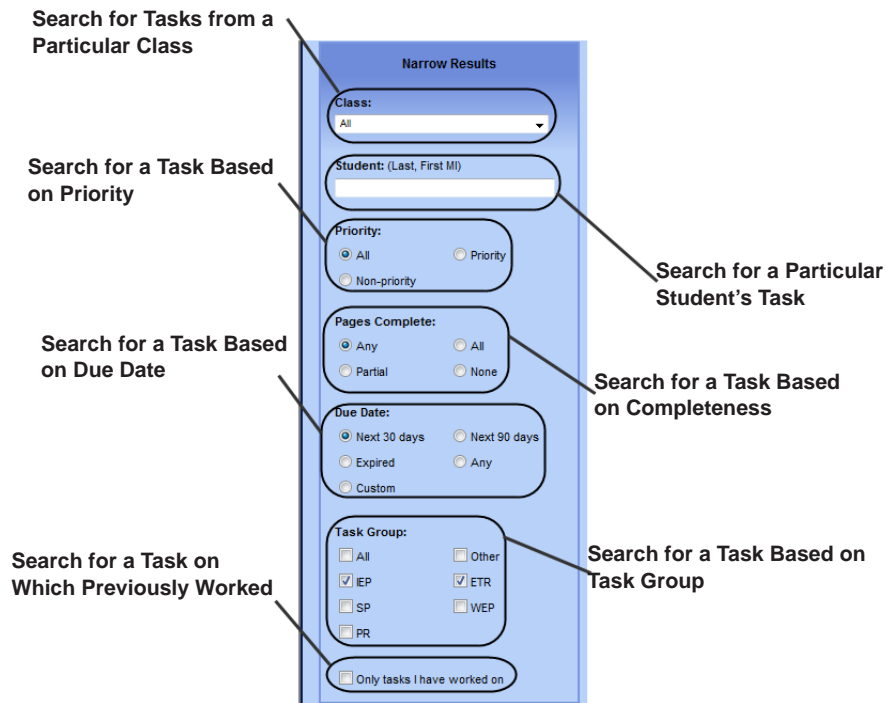


Actions on the Task Queue Screen

Change Task Display Options on the Task Queue Screen

You can change the tasks that display on the Task Queue screen by selecting the filter criteria in the Narrow Results area. You can filter the displayed tasks by class, student, priority, completeness, due date, task group and tasks on which you previously worked.

Note: If there are no tasks that meet your search criteria, the following message displays in the task results area, "No tasks found."



Task Queue Screen Filter Options in the Narrow Results Area


When you access the Task Queue screen in the Narrow Results area, the options default to the following:

- The Class list defaults to All.
- The Student list defaults to none.
- The Priority option defaults to All.
- The Pages Complete option defaults to Any.
- The Due Date option defaults to Next 30 days.
- The Task Group option defaults to IEP and ETR.
- The Only task I have worked on option is not selected.

Note: Once you navigate from the Task Queue screen, the values in the Narrow Results area remain on the filter options you selected. These values will remain for as long as you are in SpecialServices for that session.

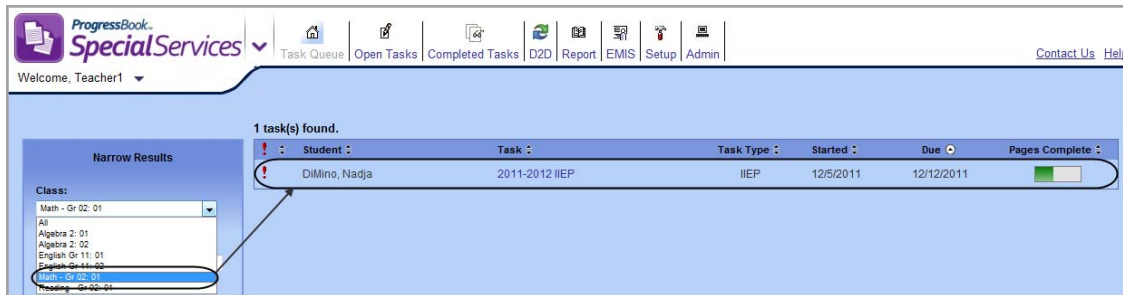
Class List Option in the Narrow Results Area

In the Narrow Results area, you can use any combination of filter options to display the tasks that match your specific search criteria. If you have access to multiple classes, you can choose to display only tasks associated with students in a specific class by performing the following:

1. On the Task Queue screen in the Narrow Results area in the Class list, click .
2. From the list, select the **class**.

The screen automatically updates displaying tasks only associated with the class.

Note: Hidden classes do not display in the Class list.



Task Queue Screen Class List Filter Option in the Narrow Results Area

Student Search Option in the Narrow Results Area

In the Narrow Results area, you can use any combination of filter options to display the tasks that match your specific search criteria. To search for tasks associated with a specific student perform the following:

- On the Task Queue screen in the Narrow Results area, ensure the following **options** are selected to return all tasks for the student:
 - For Class, All
 - For Priority, All
 - For Due Date, Any
 - For Task Group, All
 - For Only tasks I have worked on, deselected.
- In the Student field, type at least the **first three letters of a student's last name**.
- From the populated list, select the **student's name**.

The screen automatically updates displaying tasks only associated with the student.

The screenshot shows the ProgressBook Special Services interface. The top navigation bar includes links for Task Queue, Open Tasks, Completed Tasks, D2D, Report, EMIS, Setup, and Admin. The main content area is titled 'Task Queue' and displays a table of tasks. On the left, the 'Narrow Results' section allows filtering by Class, Student, Priority, Pages Complete, Due Date, and Task Group. The 'Student' field is highlighted with a red box, and a callout box points to it, showing a list of students: Hunt, Jaymie; Hunter, Lauren; and Hunter, Lauren. The main task list shows one task for Hunt, Jaymie, with columns for Student, Task, Task Type, Started, Due, and Pages Complete.

Student	Task	Task Type	Started	Due	Pages Complete
Hunt, Jaymie	2011-2012 IETR	IETR	12/6/2011	1/12/2012	

Task Queue Screen Student Search Filter Option in the Narrow Results Area

4. To search for another student, you can perform any of the following:
 - In the Student field, delete the name, and search for another student.
 - In the Student field, highlight the name, and press the Delete key.
 - In the Student field, highlight the name, and type the first three letters of another student's last name.
 - In the Student field, put your cursor at the end of the name, and press the Backspace key.

Priority Option in the Narrow Results Area

In the Narrow Results area, you can use any combination of filter options to display the tasks that match your specific search criteria. To search for priority tasks perform the following:

Note: All is the default option.

1. On the Task Screen in the Narrow Results area under Priority, select the **Priority** option. The screen automatically updates displaying only priority tasks.
2. To select nonpriority tasks, select the **Non-priority** option.

Note: On the Task Queue screen, Priority tasks are designated with  at the beginning of the row.

The image displays two screenshots of the ProgressBook Special Services Task Queue interface. The top screenshot shows the 'Priority Tasks' view, and the bottom screenshot shows the 'Non-priority Tasks' view. Both screenshots feature a 'Narrow Results' area on the left with filter options for Class, Student, and Priority. The Priority filter is set to 'Priority' in the top screenshot and 'Non-priority' in the bottom screenshot. The main area displays a table of tasks with columns for Student, Task, Task Type, Started, Due, and Pages Complete. In the 'Priority Tasks' view, two tasks are listed: DiMino, Nadja (IIEP) and Slates, Tiffany (RIEP). In the 'Non-priority Tasks' view, two tasks are listed: Scina, Jessica (RETR) and Shannon, Brett (IIEP). The 'Pages Complete' column shows a green bar for the first task in both views, indicating the number of completed pages out of the total pages for that task.

Task Queue Screen Priority Filter Option in the Narrow Results Area

Pages Complete Option in the Narrow Results Area

In the Narrow Results area, you can use any combination of filter options to display the tasks that match your specific search criteria. To search for tasks with pages complete perform the following:

Note: Any is the default option.

1. On the Task Screen in the Narrow Results area under Pages Complete, select the **All** option.
The screen automatically updates displaying only tasks with all pages complete.
2. To select tasks with partial pages complete, select the **Partial** option.
3. To select task with none of the pages complete, select the **None** option.

Note: On the Task Queue screen in the Pages Complete column, the green shading present in the rectangle indicates the number of completed pages out of the total pages for the task. When you hover over the icon, a tool tip displays, "X of X pages complete."

All Pages Complete

Partial Pages Complete

None Pages Complete

The screenshots illustrate the 'Pages Complete' filter options in the Narrow Results area. The filter options are: Any, All, Partial, and None. The 'Pages Complete' column in the task list shows a green bar for 'All', a partially filled green bar for 'Partial', and empty bars for 'None'.


Task Queue Screen Pages Complete Filter Option in the Narrow Results Area

Due Date Option in the Narrow Results Area

In the Narrow Results area, you can use any combination of filter options to display the tasks that match your specific search criteria. To search for tasks within a due date range perform the following:

Note: *Next 30 days is the default option.*

1. On the Task Screen in the Narrow Results area under Due Date, select the **Next 90 days** option.
The screen automatically updates displaying only tasks due within the Next 90 days.
2. To select expired tasks, select the **Expired** option.

Note: The  icon indicates that a task has expired. When you hover over the icon, a tool tip displays, "This task has expired." Another indication of an expired task is that all the text in the row displays in red except for the task name.

Student	Task	Task Type	Started	Due	Pages Complete
DIMino, Nadja	Initial IEP DIMino	Other	7/15/2010	7/29/2010	<input type="text"/>
DIMino, Nadja	test	Other	7/15/2010	7/30/2010	This task has expired

Task Queue Screen Expired Tasks

- To select tasks with any due date, select the **Any** option.
- To select tasks with a custom due date, select the **Custom** option.

Note: The default for the Custom option is the first and last days of the current month.

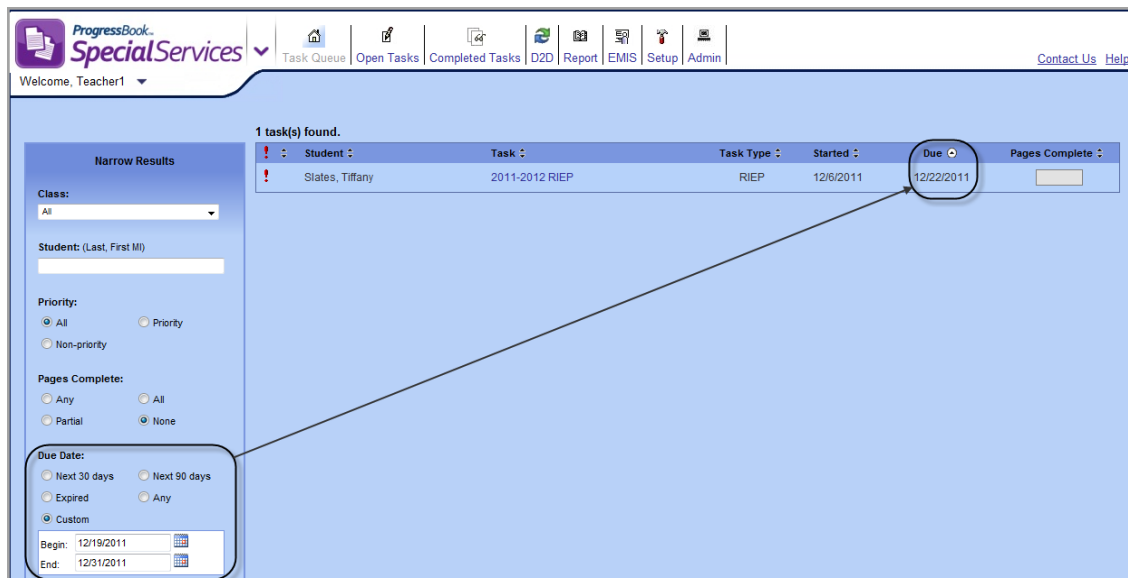
- In the Begin field, type the **desired date**, or click  to select from the calendar.

Note: You can enter dates in multiple formats, such as MM/DD/YYYY, MM/DD/YY or MM-DD-YY.

- In the End field, type the **desired date**, or click  to select from the calendar.

Note: If you enter an end date that is before the begin date, the following message displays, “End date cannot be before begin date.”

Note: If you enter an invalid date, the following message displays, “Please enter a valid date.”



The screenshot shows the ProgressBook Special Services interface. In the 'Narrow Results' sidebar, the 'Due Date' filter is set to 'Custom' with 'Begin' and 'End' dates of 12/19/2011 and 12/31/2011. The main task list shows one task found for 'Slates, Tiffany' with a due date of 12/22/2011, which is circled. An arrow points from the 'Custom' filter option to the circled due date.

Task Queue Screen Custom Due Date Filter Option in the Narrow Results Area

Task Group Option in the Narrow Results Area

In the Narrow Results area, you can use any combination of filter options to display the tasks that match your specific search criteria. To search for tasks within a task group perform the following:

Note: IEP and ETR is the default option.

1. On the Task Screen in the Narrow Results area under Task Group, select the **All** option. The screen automatically updates displaying tasks within all task groups.

Note: If you select the All option and previously selected other task group options, those previously selected options still display as selected but are disabled.

The screenshot shows the ProgressBook Special Services interface. The 'Narrow Results' section on the left contains several filter options: Class (All), Student (Last, First MI), Priority (All, Priority, Non-priority), Pages Complete (Any, Partial, None), Due Date (Next 30 days, Next 90 days, Expired, Any, Custom), and Task Group (All, SP, PR, Other, ETR, IEP). The 'Task Group' section shows 'All' selected and other options disabled. The main area displays a table of 7 tasks found, with columns for Student, Task, Task Type, Started, Due, and Pages Complete.

Student	Task	Task Type	Started	Due	Pages Complete
Dilmino, Nadja	2011-2012 IIEP	IIEP	12/5/2011	12/12/2011	100%
Huppert, Elise	2011-2012 CNST	CNST	12/6/2011	12/12/2011	0%
Ryland, Nicole	2011-2012 Invite	INV	12/6/2011	12/15/2011	0%
Householder, Morgan	2011-2012 WEP	WEP	12/5/2011	12/19/2011	0%
Scina, Jessica	2011-2012 RETR	RETR	12/6/2011	12/19/2011	100%
States, Tiffany	2011-2012 RIEP	RIEP	12/6/2011	12/22/2011	0%
Shannon, Brett	2011-2012 IIEP	IIEP	12/6/2011	1/6/2012	0%

All selected, and IEP and ETR disabled.

Task Queue Screen All Task Group Option in the Narrow Results Area

2. To select a specific task group, deselect the **All** option, and choose any of the following options or a combination of options:
 - **IEP** - Only IEP tasks.
 - **SP** - Only Service Plan tasks.
 - **PR** - Only Progress Report tasks.
 - **Other** - Task types that are not IEP, SP, PR, ETR or WEP tasks.
 - **ETR** - Only Evaluation Team Report tasks.
 - **WEP** - Only Written Education Plan tasks.

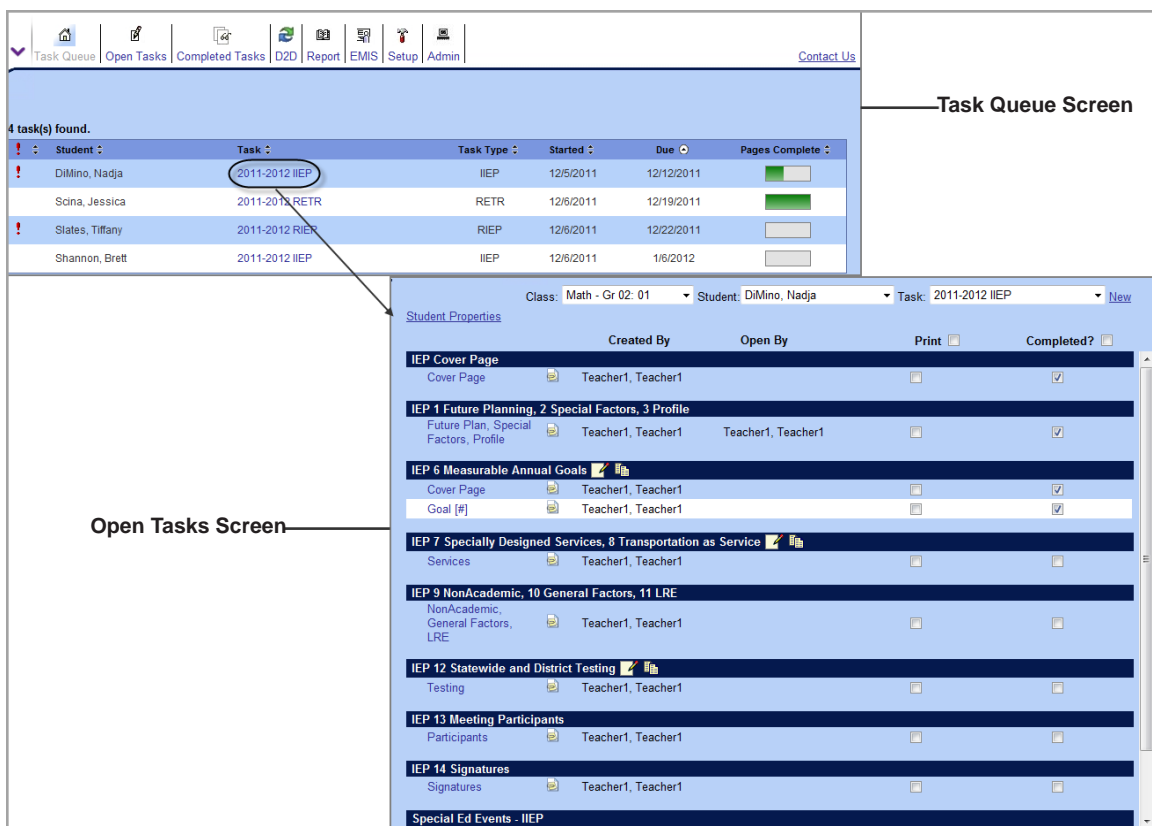
Only Tasks I Have Worked On Option in the Narrow Results Area

In the Narrow Results area, you can use any combination of filter options to display the tasks that match your specific search criteria. To search for tasks on which you have previously worked, click the option.

Note: Only tasks display that you have created or saved in SpecialServices v12.2 and higher. This option does not apply to tasks you have created and modified in versions prior to 12.2.

View Tasks


To view or edit an open task from the Task Queue screen, click the **task** you want to open. The task you selected opens on the Open Tasks screen.



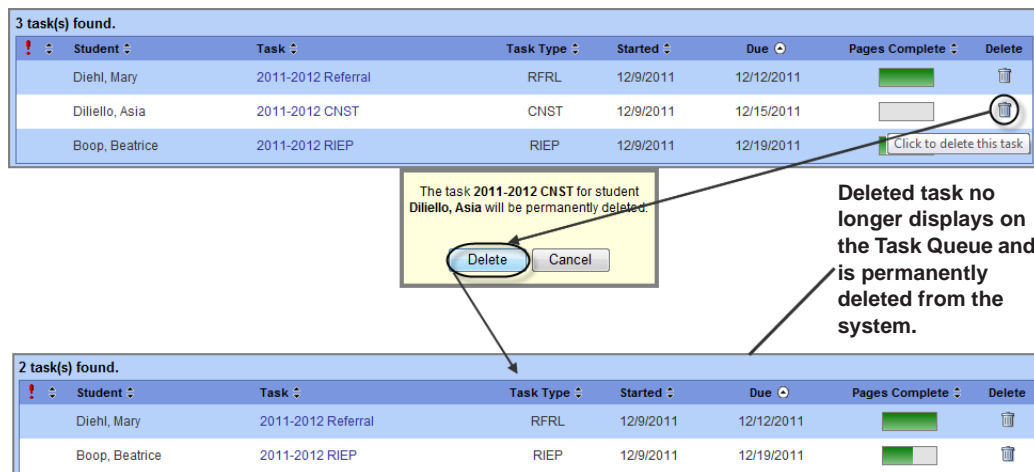
View or Edit a Task on the Open Tasks Screen

Delete Tasks

Only users with the appropriate security privileges can delete open tasks from the Task Queue screen. When you delete a task, it is permanently removed from the system.

1. On Task Queue screen, click  in the row of the task you want to delete.
2. On the deletion confirmation box, click **Delete**.

The task is deleted and no longer displays on the Task Queue screen.



The task 2011-2012 CNST for student Diliello, Asia will be permanently deleted.




Deleted task no longer displays on the Task Queue and is permanently deleted from the system.

3 task(s) found.							
!	Student	Task	Task Type	Started	Due	Pages Complete	Delete
	Diehl, Mary	2011-2012 Referral	RFRL	12/9/2011	12/12/2011	<div style="width: 100%; height: 10px; background-color: green;"></div>	
	Diliello, Asia	2011-2012 CNST	CNST	12/9/2011	12/15/2011	<div style="width: 0%; height: 10px; background-color: gray;"></div>	
	Boop, Beatrice	2011-2012 RIEP	RIEP	12/9/2011	12/19/2011	<div style="width: 0%; height: 10px; background-color: gray;"></div>	

2 task(s) found.							
!	Student	Task	Task Type	Started	Due	Pages Complete	Delete
	Diehl, Mary	2011-2012 Referral	RFRL	12/9/2011	12/12/2011	<div style="width: 100%; height: 10px; background-color: green;"></div>	
	Boop, Beatrice	2011-2012 RIEP	RIEP	12/9/2011	12/19/2011	<div style="width: 0%; height: 10px; background-color: gray;"></div>	

Delete a Task

Sort Tasks in the Task Results Area

You can sort items in all of the columns in ascending and descending order except for the Delete column. When you open the Task Queue screen for the first time, the sort order is ascending in the Due column. When you hover over  in any unsorted column, the icon is highlighted with a white background, and the tool tip displays, "Click to sort ascending." After you click the icon, it changes to , and the tool tip displays, "Click to sort descending. Click the icon again, and the icon changes to , and the tool tip displays, "Click to sort ascending."

2 task(s) found.

Student	Task	Task Type	Started	Due	Pages Complete	Delete
Diehl, Mary	2011-	RFRL	12/9/2011	12/12/2011	<div style="width: 100%; height: 10px; background-color: green;"></div>	
Boop, Beatrice	2011-2012 RIEP	RIEP	12/9/2011	12/19/2011	<div style="width: 50%; height: 10px; background-color: green;"></div>	

2 task(s) found.

Student	Task	Task Type	Started	Due	Pages Complete	Delete
Diehl, Mary	2011-	RFRL	12/9/2011	12/12/2011	<div style="width: 100%; height: 10px; background-color: green;"></div>	
Boop, Beatrice	2011-2012 RIEP	RIEP	12/9/2011	12/19/2011	<div style="width: 50%; height: 10px; background-color: green;"></div>	


2 task(s) found.

Student	Task	Task Type	Started	Due	Pages Complete	Delete
Boop, Beatrice	2011-	RIEP	12/9/2011	12/19/2011	<div style="width: 50%; height: 10px; background-color: green;"></div>	
Diehl, Mary	2011-2012 Referral	RFRL	12/9/2011	12/12/2011	<div style="width: 100%; height: 10px; background-color: green;"></div>	


Sort Columns in the Task Results Area

Open Tasks

The Open Tasks screen is the main work area in SpecialServices, enabling you to create new and view existing tasks for a particular student. You can access the Open Tasks screen in one of two ways:

- Click **Open Tasks**  on the banner.
- Click the **task** for a student on the Task Queue screen.

The blue heading rows represent all of the forms—required and optional—that comprise a particular task. Pages that have been added to a form appear as links below the heading row and display in alphanumeric order by name. The name of the user who created the page displays in the Created By column. If a user has the page open for editing, the user's name also displays in the Open By column.

Pages added as an attachment to another page are designated by  and display in the gray rows below the page to which they are associated.

The compliance due date of the task displays in the Due field in the upper-right corner of the screen along with the Priority Task check box that allows you to specify whether or not the task is in your Priority Tasks list.

Pages of the Form (Sorted Alphanumerically by Name) Click to add an Attachment Page. Attachment Page

Class: Algebra 2: 01 Student: Montecalvo, Brittany Task: Reevaluation 2010 New

Due: 5/7/2010
Priority Task
Change Name

Created By	Open By	Print	Completed?
ETR Cover Page			
Cover Page	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
ETR 1 Individual Assessment			
Assessment - Psychologist	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
Assessment - Speech Therapist	McCoy, Leonard	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ETR 2 Team Summary			
Team Summary	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
Team Summary - Page 2			
ETR 3 Specific Learning Disability (Optional)			
Determination SLD	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
ETR 4 Eligibility			
Eligibility	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
ETR 5 Signatures			
Signatures	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
ETR Evaluation Plan School-Age			
Evaluation Plan	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
Special Ed Events			
Special Ed Events	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
Uploaded Pages			
Signatures		<input type="checkbox"/>	

Add a Form Upload a Page Print Verify EMIS Complete Task

Optional form added by clicking the Add a Form button.

Open Tasks Screen

Modify Student Properties

You can modify or view the demographic information about a student that is shared by multiple tasks, such as the student’s name, address, school district of residence and parent contact information on the Student Properties window. You can always view the student properties even if there are no open tasks for the student. Users with the appropriate security privileges can modify the information in the demographic fields on the Student Properties window, and the system will apply the changes to all of the forms in the open tasks associated with the student.

If your district is integrated with certain student information systems, some of the values in the modifiable fields may populate from the information imported during the nightly integration process. If the values in any of these fields do not match the values imported through the nightly integration process, a message displays on the Student Properties window that prompts you to refresh the values to those imported from the student information system. You can refresh the fields or continue using the values entered in SpecialServices.

The demographic information is only modifiable on the Student Properties window. You cannot modify the corresponding demographic fields on the page on which they display. The Student Name, Student Address, Parent Name, Parent Address and Parent Home Phone information cannot be edited. You must modify this information in your student information system.

If parent contact information exists, you can import it to the Parent Invitation Form. See “*Import Parent Information.*”

1. On the Open Tasks screen, select the **student** for whom you want to view or modify the student properties.
2. Click the **Student Properties** link.

The Student Properties window opens in a new Web browser.

Message that displays if any values differ from the values imported from your student information system.

The screenshot shows the 'Student Properties' window. On the left, a message box titled 'Updates available' contains an information icon and the text: 'This student's demographic information does not match the current data in the Student Information System. Click refresh to reload data from SIS.' Below the message is a 'Refresh' button. The main form contains the following fields:

- Student: Montecalvo, Brittany
- Student Address: 20783 LAKE RD Rock View OH 99916
- Parent Name: M/M FRED ULREICH
- Parent Address: 20783 LAKE RD Rock View OH 99916
- Parent Home Phone: 8883563735
- Parent Work Phone: [text input]
- Parent Cell Phone: [text input]
- Parent Email: [text input]
- Second Parent Name: Melanie Montecalvo
- Second Address: 1311 Benner Blvd.
- Second City: Stow
- Second State: OH
- Second Zip Code: 44224
- Second Home Phone: 3308803392
- Second Work Phone: 3306867000 x 123
- Second Cell Phone: [text input]
- Second Email: mmontecalvo@gmail.com
- District Of Residence: Demo
- County of Residence: Summit
- District Of Service: Akron City SD
- Disability Category: Speech or Language Impairment

A 'Save Properties' button is located at the bottom of the form.

Student Properties Window

3. If you receive a message indicating that the values displayed in the modifiable fields do not match the values imported from your student information system and you want to update the student properties to use the imported values, perform the following steps:
 - a. Click **Refresh**.

The fields affected by the update are framed in the following two colors:

- **Blue** – Indicates that the value in the field has been changed to the value imported from your student information system.
- **Dark Gold** – Indicates that a corresponding value does not exist in the demographic information imported from your student information system. The value in the field is not modified. Because this value is different than the information imported from your student information system, you will continue to receive the prompt to refresh the values whenever you access this window.

Note: The tool tip over the framed field displays information about the modified value.

- b. Click **Save Properties** to save the refreshed values.

Open Tasks

4. To manually modify the student properties:
 - a. Enter new or modify the existing the information in the desired field, and then click **Save Properties**.
 - b. On the message that confirms the changes have been saved, click **OK**.

The next time you open a page that contains the student's demographic information, the field you modified will reflect the change you entered in the previous step.
5. To exit the Student Properties window, click **Close**.

Note: If you refreshed the values from your student information system, as described in step 3, the values are saved when you click Close even if you did not manually save them by clicking Save Properties.

6. To view the student properties for another student, select the **student** in the Student list.

Create New Tasks

You can create tasks in one of two ways: create a completely new task with blank forms or create a new task using the information entered on the forms from a completed task. Both options are available on the Create New Task window, which displays when you click the New link on the Open Tasks screen. The method you use to create the new task depends on the purpose for which you are creating the task. For example, if you are creating a new IEP based on a completed draft IEP, you would create the new IEP task from the IEP draft.

The following table lists all the available tasks in SpecialServices. Your district may provide additional tasks or custom versions of these tasks. Refer to your district procedures for more details about any custom tasks that do not appear in the list.

SpecialServices Tasks

Task	Description
IEP Tasks	
RIEP - Periodic Review IEP	Contains the Individualized Education Plan (IEP) (PR-07) forms required for students under the age of 14. Select this task for students who already receive special education services, are under the age of 14 and for whom a periodic review has determined that a new IEP is required.
RIEP - Periodic Review IEP (age 14+)	Contains the required IEP forms, including the IEP 4 PostSecondary Transition and IEP 5 PostSecondary Transition Services forms, for students age 14 or over. Select this task for students who are already receiving special education services, are 14 years old or older and for whom a periodic review has determined that a new IEP is required.
IIEP - Initial IEP	Contains the IEP forms required for students for whom the district will provide special education services. Select this task only for the student's first IEP upon initial entry into a special education program. For all subsequent IEPs—for example, those created following an annual review—create the applicable RIEP task.

Task	Description
FIEP - Final IEP for Graduation	Contains the IEP forms required for a student already receiving special services whose IEP end date comes before the end of the year in which the student will graduate. Select this task for students graduating from high school for whom the content of the current IEP will continue for the remainder of the school year.
Progress Report (IEP) Tasks	
Progress Report (IEP)	Contains the IEP progress report form that provides a single column for entering the student's progress for each objective/benchmark, a goal field and one comment field.
PR (IEP) - 4 - Progress Goals & Obj	Contains the IEP progress report form that provides four columns for entering the student's progress for the student's goal, four columns for entering the student's progress for each objective/benchmark and one comment field.
Progress Report (IEP) - 4 - Goals & Objectives	Contains the IEP progress report form that provides four columns for entering the student's progress for each objective/benchmark, a goal field and one comment field.
Progress Report (IEP) - 4 - Goals Only, 1 Comment	Contains the IEP progress report that provides four columns for entering the student's progress for the goal and one comment field.
ProgressReport (IEP) - 4 - Goals Only, 4 Comments	Contains the IEP progress report that provides four columns for entering the student's progress for the goal and four comment fields.
PR (IEP) - 6 - Progress Goals & Obj	Contains the IEP progress report that provides six columns for entering the student's progress for the student's goal, six columns for entering the student's progress for each objective/benchmark and one comment field.
Progress Report (IEP) - 6 - Goals & Objectives	Contains the IEP progress report that provides six columns for entering the student's progress for each objective/benchmark, a goal field and one comment field.
Progress Report (IEP) - 6 - Goals Only, 1 Comment	Contains the IEP progress report that provides six columns for entering the student's progress for the goal and one comment field.
Progress Report (IEP) - 6 - Goals Only, 6 Comments	Contains the IEP progress report that provides six columns for entering the student's progress for the goal and six comment fields.
PR (IEP) - 8 - Progress Goals & Obj	Contains the IEP progress report that provides eight columns for entering the student's progress for the student's goal, eight columns for entering the student's progress for each objective/benchmark and one comment field.
Progress Report (IEP) - 8 - Goals & Objectives	Contains the IEP progress report that provides eight columns for entering the student's progress for each objective/benchmark, a goal field and one comment field.
Progress Report (IEP) - 8 - Goals Only, 1 Comment	Contains the IEP progress report that provides eight columns for entering the student's progress for the goal and one comment field.
Progress Report (IEP) - 8 - Goals Only, 8 Comments	Contains the IEP progress report that provides eight columns for entering the student's progress for the goal and eight comment fields.
ETR and ETR-Related Tasks	
RFRL - Referral for Evaluation	Contains the Referral for Evaluation (PR-04) form used to refer a student in the general curriculum for evaluation by a special education services team.
CNST - Parent Consent	Contains the Parent Consent for Evaluation (PR-05) form used to obtain a parent's consent for evaluation by a special education services team.

Open Tasks

Task	Description
RETR - Reevaluation (School-Age)	Contains the required Evaluation Team Report (ETR) (PR-06) forms, including the Evaluation Plan School-Age form, for school-aged students. Select this task for school-aged students already receiving special services who are subject to re-evaluation.
RETR - Reevaluation (Preschool)	Contains the required ETR forms, including the Evaluation Plan Preschool form, for preschool students. Select this task for preschool students already receiving special services who are subject to re-evaluation.
IETR - Initial Evaluation (School-Age)	Contains the required ETR forms, including the Evaluation Plan School-Age form, for school-aged students. Select this task only for school-aged students for whom you want to begin the initial evaluation to determine eligibility for special services. For all subsequent ETRs for this student, create the applicable RETR task.
IETR - Initial Evaluation (Preschool)	Contains the required ETR forms, including the Evaluation Plan Preschool form, for preschool students who are not already enrolled in a special services program. Select this task only for preschool students for whom you want to begin the initial evaluation to determine eligibility for special services. For all subsequent ETRs for this student, create the applicable RETR task.
Transfer Student IEP & ETR Tasks	
TETR - Transfer ETR	Contains only the ETR Cover Page and Special Education Events Form by default. You can add any additional ETR pages as required to complete an evaluation for students transferring into your district. Select this task for students whose transferred IEP your district will accept without changes. If your district is not adopting the transferred IEP, use the appropriate IETR task.
TIEP - Transfer IEP	Contains the IEP Cover Page and Special Education Events Form by default. You can add any additional IEP forms as required to complete an IEP for students transferring into your district. Select this task for students whose transferred IEP your district will accept without changes. If your district is not adopting the transferred IEP, use the IIEP - Initial IEP task.
Service Plan (SP) Tasks	
SP - Service Plan	Contains the Service Plan (SP) (PR-09) forms required for students enrolled in nonpublic schools for whom the district will provide special education services.
PR (SP) - 4 - Progress Goals & Obj	Contains the SP progress report form that provides four columns for entering the student's progress for the student's goal, four columns for entering the student's progress for each objective/benchmark and one comment field.
Progress Report (SP) - 4 - Goals & Objectives	Contains the SP progress report form that provides four columns for entering the student's progress for each objective/benchmark, a goal field and one comment field.
Progress Report (SP) - 4 - Goals Only, 1 Comment	Contains the SP progress report that provides four columns for entering the student's progress for the goal and one comment field.
Progress Report (SP) - 4 - Goals Only, 4 Comments	Contains the SP progress report that provides four columns for entering the student's progress for the goal and four comment fields.
PR (SP) - 6 - Progress Goals & Obj	Contains the SP progress report that provides six columns for entering the student's progress for the student's goal, six columns for entering the student's progress for each objective/benchmark and one comment field.
Progress Report (SP) - 6 - Goals & Objectives	Contains the SP progress report that provides six columns for entering the student's progress for each objective/benchmark, a goal field and one comment field.

Task	Description
Progress Report (SP) - 6 - Goals Only, 1 Comment	Contains the SP progress report that provides six columns for entering the student's progress for the goal and one comment field.
Progress Report (SP) - 6 - Goals Only, 6 Comments	Contains the SP progress report that provides six columns for entering the student's progress for the goal and six comment fields.
PR (SP) - 8 - Progress Goals & Obj	Contains the SP progress report that provides eight columns for entering the student's progress for the student's goal, eight columns for entering the student's progress for each objective/benchmark and one comment field.
Progress Report (SP) - 8 - Goals & Objectives	Contains the SP progress report that provides eight columns for entering the student's progress for each objective/benchmark, a goal field and eight comment fields.
Progress Report (SP) - 8 - Goals Only, 1 Comment	Contains the SP progress report that provides eight columns for entering the student's progress for the goal and one comment field.
Progress Report (SP) - 8 - Goals Only, 8 Comments	Contains the SP progress report that provides eight columns for entering the student's progress for the goal and eight comment fields.
Miscellaneous Tasks	
Prior Written Notice	Contains the Prior Written Notice (PR-01) form required to inform a parent or guardian of the actions the district is taking in regard to a student's special education services.
Parent Invitation	Contains the Parent Invitation (PR-02) required to invite a parent or guardian to any meeting involving the educational welfare of the student.
Manifestation Determination	Contains the Manifestation Determination Review (PR-03) form required to assess whether or not a student's improper conduct in school is related to his/her disability.
Other Meeting	Does not contain any forms by default; however, you can upload pages relevant to the meeting or add the available optional forms. Select this task for other purposes not covered by any of the other tasks.
DP - Due Process	Contains the Due Process (PR-08) form used to file a complaint about the special services determination.
Written Education Plan (WEP) Tasks	
WEP - Gifted WEP	Contains the Written Education Plan (WEP) forms required for students who will receive gifted services.
Progress Report (WEP)	Contains the progress report forms for students receiving gifted services who have a WEP.
Behavior Intervention Plan (BIP) Tasks	
BIP - Behavior Intervention Plan	Contains the Behavior Intervention Plan (BIP) forms required for students who will receive special education services.

Creating a New Task

When you create a new task, the system provides all of the required forms, creating a page for each form that you can begin editing. You can add additional forms once the task is created. All of the pages generated at the time the task is created display your name in the **Created By** field.


1. On the **Open Tasks** screen, select the student for whom you want to create the new task.
2. Click **New**.

The **Start a New Task** window displays.

Start a New Task Window

3. Select the task you want to create in the **Task Template** drop-down list.
4. The current school year precedes the task name in the **Task Name** field by default. You can change the description of the task if desired.

Note: *If you modify the task name and then select a different school year other than the current school year, the task name reverts back to the default task name.*

5. Select the school year to which the task applies in the **School Year** drop-down list. The current year is the default option.
6. Select the grade level of the student in the **Grade Level** drop-down list. The student's current grade level is the default option.
7. Click  next to the **Compliance Due Date** field to select the date the task is due, or type the due date in the field. The compliance due date of the event is the deadline required for this event to be in compliance with EMIS.
8. To mark the task as a Priority Task on the Task Queue screen, select the **Add to my priority task list** check box.
9. Click **Start Task** to create the task.

The **Open Task** screen displays and automatically creates the required pages for the new task.

Note: *Once a task is created, you can view it on the Task Queue screen. If you selected the Add to my priority task list option in step 8, on the Task Queue*

screen, the row in which the task displays begins with a .

Created By	Open By	Print	Completed?
IEP Cover Page			
Cover Page	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile			
Future Plan, Special Factors, Profile	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals			
Goal [#]	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
IEP 7 Specially Designed Services, 8 Transportation as Service			
Services	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
IEP 9 NonAcademic, 10 General Factors, 11 LRE			
NonAcademic, General Factors, LRE	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
IEP 12 Statewide and District Testing			
Testing	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
IEP 13 Meeting Participants			
Participants	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>
IEP 14 Signatures			
Signatures	McCoy, Leonard	<input type="checkbox"/>	<input type="checkbox"/>

New IEP Task with Required Pages

10. You can now perform any of the following actions:

- Add additional pages for the task. If you selected to add optional forms, you will need to create a page for the form. See *“Create New Pages.”*
- Add an optional form to the task. See *“Add Optional Forms.”*
- Add an attachment to a page. See *“Add Attachments.”*
- Upload a read-only page. See *“Upload Pages.”*
- Open a page to begin entering information. See *“Open Pages.”*

Create a New Task from an Existing Task

You can create a new task for a student by copying information from any of the student’s open or completed tasks. You could use this feature to create an addendum to an existing IEP, copy a prior draft to create a new IEP or copy the goals from an IEP task to a Progress Report task.

When you create a new task from an existing task of the same type, all of the information entered in the sections of the forms from the original task are copied to the corresponding forms or sections in the new task. Additionally, any uploaded pages, optional forms and attachments added to the original task are copied to the new task.

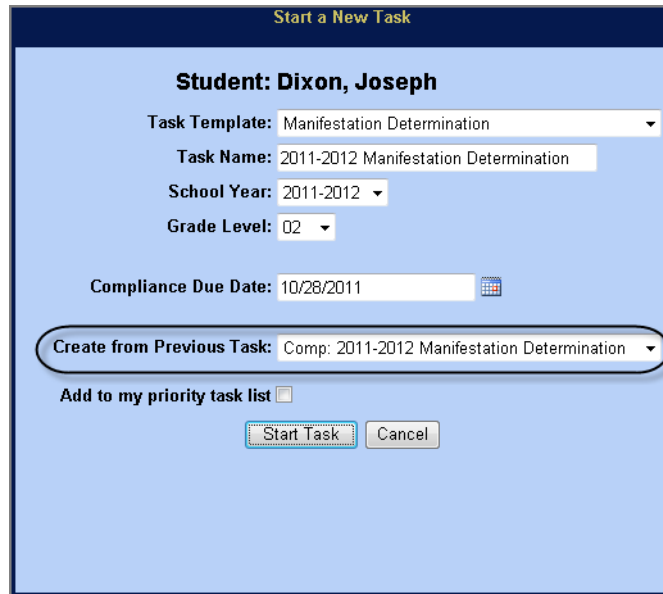
When you create a new task from an existing task of a different type, only the information common between both forms is copied to the new task. For example, when creating a Progress Report (IEP) task, you could select the student’s IEP task. The system copies the information entered on the IEP 6 Measurable Annual Goals form to the corresponding sections on the progress report form as well as creates a progress report page for each goal page in the IEP.

The demographic information is not copied from the original task to the new task. The system uses the most current demographic information from the student information system and the Student Properties screen.

Open Tasks

1. On the **Open Tasks** screen, select the student for whom you want to create the new task. See “*Select Students.*”
2. Click **New**.


The **Start a New Task** window displays.



Start a New Task Window

3. Select the task you want to create in the **Task Template** drop-down list.
4. The current school year precedes the task name in the **Task Name** field by default. You can change the description of the task if desired.

Note: If you modify the task name and then select a different school year other than the current school year, the task name reverts back to the default task name.

5. Select the school year to which the task applies in the **School Year** drop-down list. The current year is the default option.
6. Select the grade level of the student in the **Grade Level** drop-down list. The student's current grade level is the default option.
7. Click  next to the **Compliance Due Date** field to select the date the task is due, or type the due date in the field. The compliance due date of the task is the deadline required for this event to be in compliance with EMIS.
8. Select the task from which you want to create the new task in the **Create from Previous Task** drop-down list.

Note: Completed tasks display as the task name preceded by “Comp:” in the *Create from Previous Task* drop-down list.


Note: Only tasks completed between the current date and 18 months in the past are available for selection in the *Create from Previous Task* drop-down list.

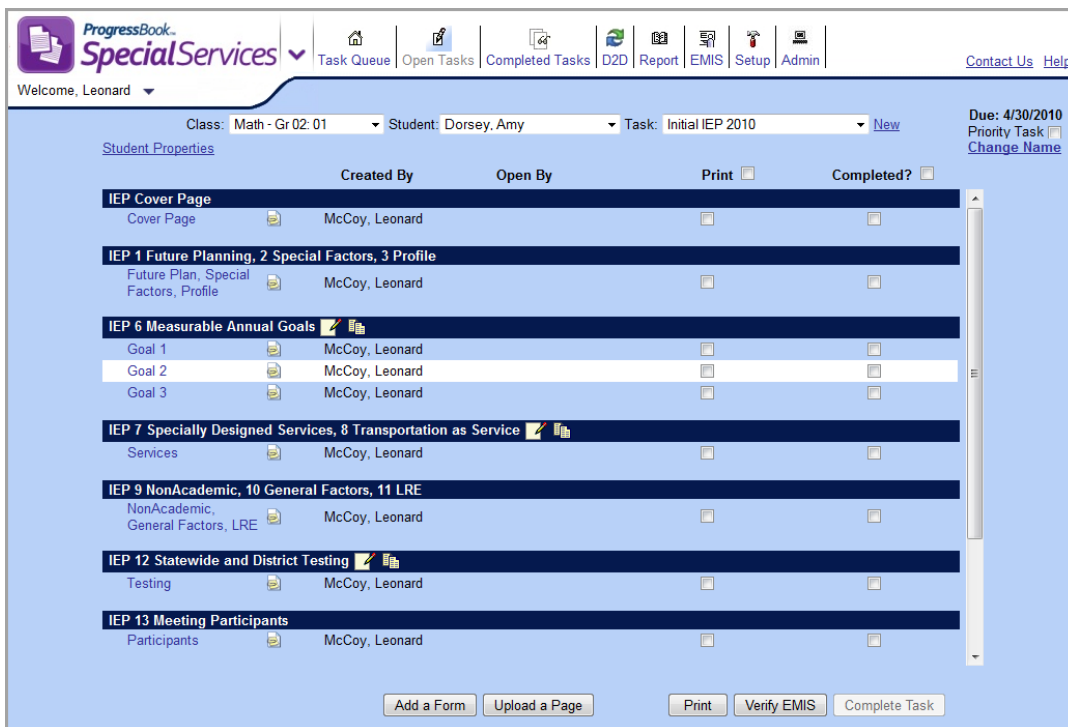
Note: SSEM archived forms, Classic View forms created in a district prior to the Task Model conversion and Classic View forms that were transferred using District-to-District Transfer form sets are not available.

9. To mark the task as a Priority Task on the Task Queue screen, select the **Add to my priority task list** check box.
10. Click **Start Task** to create the task.

All of the forms and attachments from the original task are created and display on the **Open Tasks** screen. When you open a page, the information from the original task displays in all of the sections. If the original task was a different task type than the new task, only the information relevant between the two tasks was copied to the appropriate pages.

Note: Once a task is created, you can view it on the Task Queue screen. If you selected the Add to priority task list option in step 9, on the Task Queue screen,

the row in which the task displays begins with a  .



ProgressBook Special Services

Task Queue | Open Tasks | Completed Tasks | D2D | Report | EMIS | Setup | Admin

Welcome, Leonard

Class: Math - Gr 02: 01 | Student: Dorsey, Amy | Task: Initial IEP 2010 | New

Due: 4/30/2010
Priority Task
[Change Name](#)

Student Properties	Created By	Open By	Print	Completed?
IEP Cover Page				
Cover Page	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile				
Future Plan, Special Factors, Profile	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals				
Goal 1	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
Goal 2	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
Goal 3	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 7 Specially Designed Services, 8 Transportation as Service				
Services	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 9 NonAcademic, 10 General Factors, 11 LRE				
NonAcademic, General Factors, LRE	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 12 Statewide and District Testing				
Testing	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 13 Meeting Participants				
Participants	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>

Add a Form | Upload a Page | Print | Verify EMIS | Complete Task

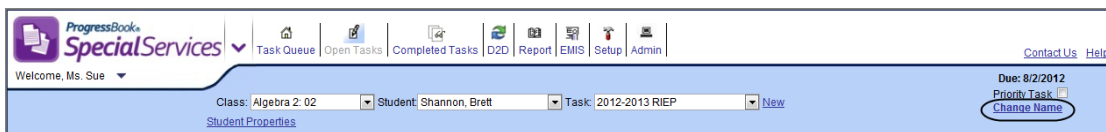
Create New Task from Existing Task with Pages from the Original Task

11. You can now perform any of the following actions:

- Add additional pages. If you selected to add optional forms, you will need to create a page for the form. See “Create New Pages.”
- Add an optional form to the task. See “Add Optional Forms.”
- Add an attachment to a page. See “Add Attachments.”
- Upload a read-only page. See “Upload Pages.”
- Open a page to begin entering information. See “Open Pages.”

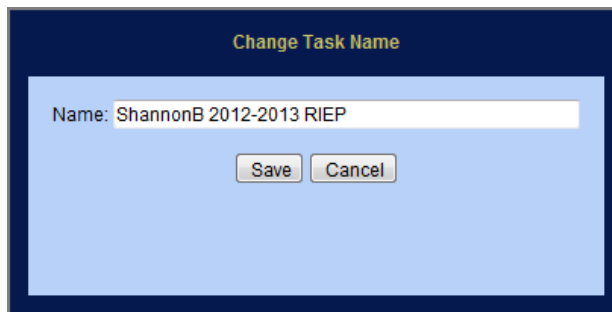
Rename Open Tasks

1. On the Open Tasks screen in the Class list, select the **class**, and in the Student list, select the **student** whose open tasks you want to rename.
2. In the Task list, select the **task** you want to rename.
3. Click **Change Name**.



Change Name Link on the Open Tasks Screen

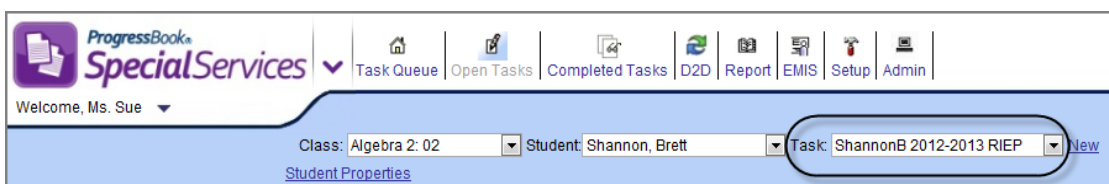
4. On the Change Task Name window, enter the **new name** in the Name field.



Change Task Name Window

5. Click **Save**.

The new name displays for the task on the Open Tasks screen.





Renamed Task on the Open Tasks Screen

Create New Pages

All of the required pages you need to complete the task are automatically generated when you create the task. However, you may need to create multiple pages of the same type. For example, if your student has multiple goals to meet for his/her IEP, you will need to create an IEP 6 Goals page for each goal. You can create a new page by generating an entirely new page or copying an existing page from a previous task.

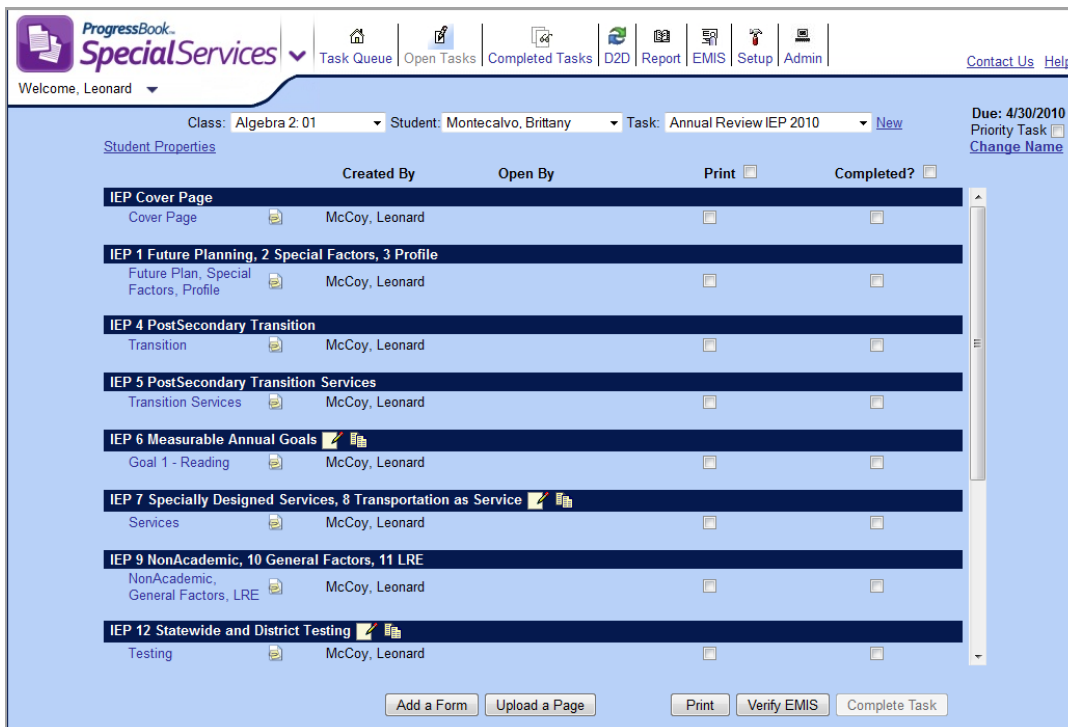
Additionally, you can create new pages by copying an existing page from the current task, another open task or completed task. For example, you could copy the goals from the Measurable Annual Goals page in an IEP to create a new progress report page.

Creating a New Page

You can create a new page for any form next to which  displays. If a page has already been created for a form that does not allow multiple pages, such as IEP 1 Future Planning, 2 Special Factors, 3 Profile,  does not display unless the page has been deleted.

1. On the Open Tasks screen, select the **student** for whom you want to create the page. See “Select Students.”
2. Select the **task** to which you want to add a page in the Task list.

The pages created for the task display on the Open Tasks screen.



The screenshot shows the 'Open Tasks' screen in ProgressBook Special Services. The user is logged in as Leonard. The current task is 'Annual Review IEP 2010' for student 'Montecalvo, Brittany' in class 'Algebra 2: 01'. The screen displays a table of IEP forms with columns for 'Created By', 'Open By', 'Print', and 'Completed?'. The forms listed are:

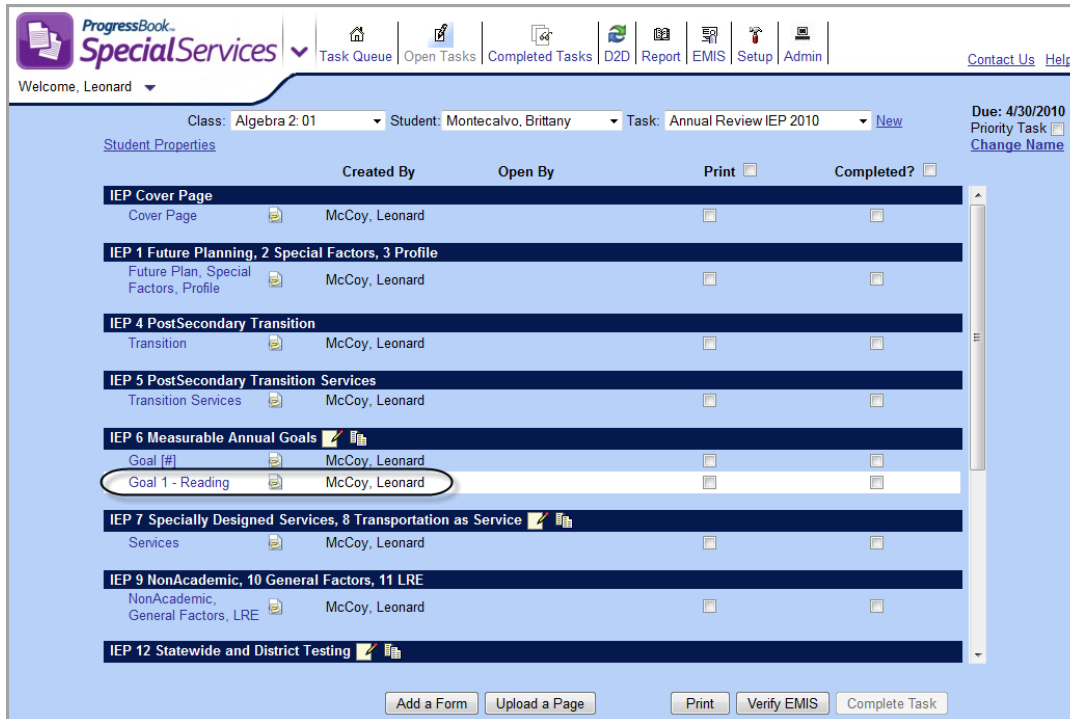
Form Name	Created By	Open By	Print	Completed?
IEP Cover Page Cover Page	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile Future Plan, Special Factors, Profile	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 4 PostSecondary Transition Transition	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 5 PostSecondary Transition Services Transition Services	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals Goal 1 - Reading	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 7 Specially Designed Services, 8 Transportation as Service Services	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 9 NonAcademic, 10 General Factors, 11 LRE NonAcademic, General Factors, LRE	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
IEP 12 Statewide and District Testing Testing	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the screen, there are buttons for 'Add a Form', 'Upload a Page', 'Print', 'Verify EMIS', and 'Complete Task'.

Forms with Multiple Pages in an IEP Task on the Open Tasks Screen

3. Click  in the row of the page you want to add.


A new page is created and displays in a new row.



New Page Added to Form

4. To open the page and begin working on it, click the **page name**. See “Open Pages.”


Creating a New Page from an Existing Page

You can create a new page based on the information from an existing page in the current task, another open task or completed task, including those tasks or forms transferred from another district using the District-to-District Transfer tool. You can create a new page using the information from an existing page for any form next to which  displays.

1. On the Open Tasks screen, select the **student** for whom you want to create a new page from an existing page. See “Select Students.”
2. Select the **task** to which you want to add a page in the Task list.

The pages created for the task display in the grid on the Open Tasks screen.

Form with Copy from Existing Page Icon on Open Tasks Screen

- Click  in the row of the page you want to create from an existing page. The Create from Existing window displays.

Create from Existing Window

- Select the **task** from which you want to copy the page in the Select Task list. The Select Page to Create From list is populated with the pages that comprise the selected task.

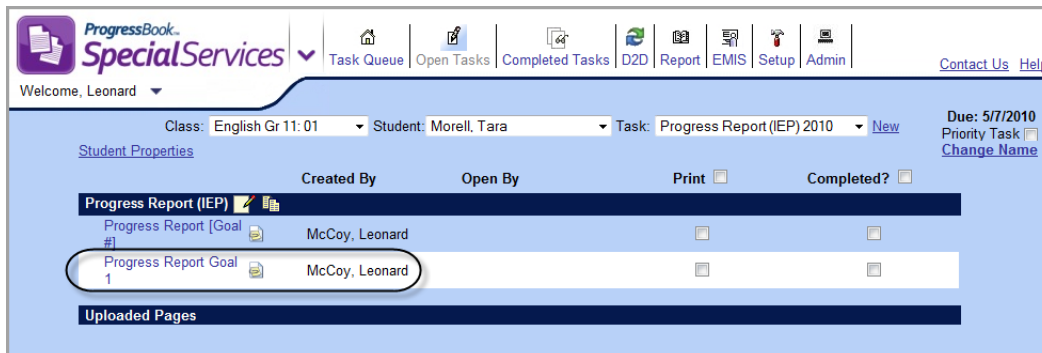
Note: Available completed tasks display with the “Completed Task:” prefix to assist you in selecting the correct task. All other listed tasks are currently open tasks.

Note: SSEM archived forms, Classic View forms created in a district prior to the Task Model conversion and Classic View forms that were transferred using District-to-District Transfer form sets are not available.

- Select the **page** from which you want to copy information for your new page in the Select Page to Copy From list.
- Click **Create Page**.

A new page, including any attachments associated with the page, displays containing the information from the page you selected to copy in step 5.

Note: The name of the page is not copied to the current task. You will have to rename the page appropriately from the Page Edit screen. See “Rename Pages.”



New Page Copied from Existing Page

7. To open the page and begin working on it, click the **page name**. See “Open Pages.”

Add Optional Forms

Every task contains optional forms you can add. For example, if the student is 16 years of age or older, you would need to include the IEP 5 PostSecondary Transition Services form in your IEP task.

If you selected the Include Optional Forms? check box on the Create New Task window when you created the new task, all of the optional forms for the task already display for the task. Once the form exists in the task, you must create a page for the form, as described in “Create New Pages.”

1. On the Open Tasks screen, select the appropriate **student**. See “Select Students.”
2. Select the **task** to which you want to add a form in the Task list.
3. Click **Add a Form**.

The Add Optional Form(s) to the Task window displays, listing the optional forms available for the task.


Add Optional Form(s)

Select form(s) to add:

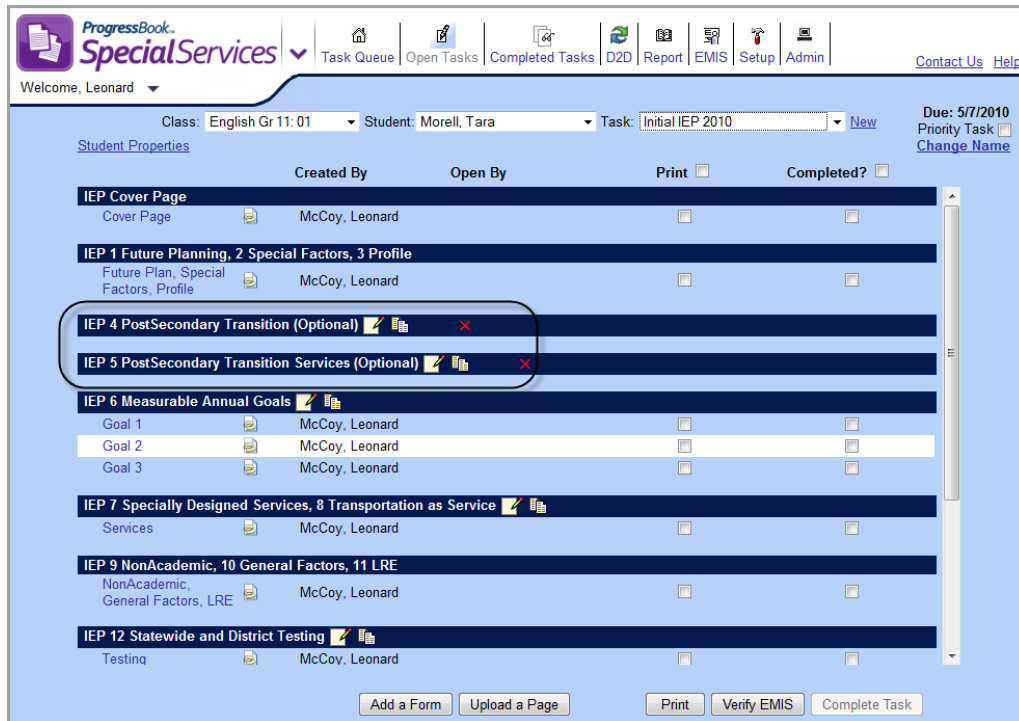
- IEP 4 PostSecondary Transition (Optional)
- IEP 5 PostSecondary Transition Services (Optional)
- IEP 15 Visual Impairments (Optional)
- Parent Excusal of IEP Team Member (Optional)
- Prior Written Notice (Optional)
- Parent Invitation (Optional)
- General Invitation (Optional)
- Special Ed Events (Optional)
- Documentation of Attempts (Optional)
- Due Process (Optional)
- Summary of Performance (Optional)

Add Forms Cancel

Add the Form to the Task

4. To preview the form in a new window, click .
5. Click the **form name**, or select the **check box** next to the name of the form(s) you want to add to the task.
6. Click **Add Forms**.

The form(s) you selected display in correct chronological position in the form list on the Open Tasks screen. For example, if you selected the IEP 5 PostSecondary Transition Services form, it displays after the IEP 1-3 Future Planning, Special Factors, Profile form or the IEP 4 PostSecondary Transition, if selected. Other forms, such as Prior Written Notice, display at the bottom of the list.



Optional Forms Added to Task

7. Create a new page for each form you added to the task. See “*Create New Pages.*”

Delete Optional Forms

Users with the appropriate security privileges can delete optional forms from the task.

Before you can delete an optional form, you must first delete all pages that have been created for the form. See “*Delete Pages.*” If no pages have been created for the form you want to delete, **X** displays next to the form name.

1. With the task displayed on the Open Tasks screen, click **X** next to the form you want to delete.

A message displays, “Optional form will be removed from this task.”

2. Click **Delete** on the message.

The selected form is deleted and no longer displays in the list of forms for the task.

Edit Pages

On the Page Edit screen, you can perform the following actions:

- Open and complete the information on the page.
- Save content you entered on the page.
- Open the Quick Task Menu to navigate to all the pages associated with a task without returning to the Task Queue.

- Change the name of the page, which displays on the Open Tasks and Completed Tasks screens.
- Lock a page to prevent other users from accessing it.
- Import parent information on the Parent Invitation Form.
- Import stored phrases from the banks to a field on the page.
- Add state standards to a field on the page.
- Check the spelling of the content you entered on the page.
- Delete the page or attachment.

Open Pages

Once you have added pages to a task on the Open Tasks screen, click the **name** of the page to open it on the Page Edit screen. The Page Edit screen displays the page in a format that enables you to enter the appropriate information.


The Page Edit Screen toolbar displays on the Page Edit screen. The toolbar provides functions available for updating the page information in SpecialServices, such as changing the page name, marking the page as complete, locking the page, deleting the page or importing parent information on the Parent Invitation Form. The options that display on the Page Edit screen toolbar vary depending on the type of page that is open.

The screenshot shows the 'Page Edit Screen' for a form titled 'IEP Individualized Education Program'. The toolbar at the top contains buttons for 'Check Spelling', 'Print & Save', 'Save & Close', and 'Save Form'. The form fields are organized into two main sections: 'CHILD'S INFORMATION' and 'MEETING INFORMATION'. The 'CHILD'S INFORMATION' section includes fields for Name (James Day), ID Number (999001264), Grade (02 / 02), Date of Birth (8/5/2007), Gender (M), Street (19234 RIVERVIEW AV), City (Rock View), State (OH), ZIP (99916), District of Residence (000000 Demo), and County of Residence. The 'MEETING INFORMATION' section includes a Meeting Date field, a Meeting Type dropdown (with options for Initial IEP, Annual Review, and Review Other Than Annual Review), and an Amendment checkbox.

Page Edit Screen

Note: The Adobe Acrobat Toolbar displays only for custom forms, which are PDFs, and provides functions that pertain only to the displayed page, such as printing and changing the page magnification. The options that display in this toolbar are determined by the settings in Adobe Reader.

The Open By column on the Open Tasks screen indicates the user who currently has the page open. If a page is opened to another user, you can open it. However, if you intend to edit the page, be aware that the system stores the changes made by the first user to save the page.

Note: You cannot open pages locked by another user unless you have the appropriate security privileges. If a page is locked,  displays next to the page name.

Read-Only and Editable Fields on Web Forms

On Web forms, the editable fields are distinguishable by a box around the area in which you can type. Read-only fields are shown without a box around them.

The screenshot shows an IEP Individualized Education Program form. The title is "IEP Individualized Education Program". Below the title, there is a note: "This IEP will be implemented during the regular school term unless noted in general factor". The form is divided into sections, with "CHILD'S INFORMATION" being the first. Fields include: NAME: Nadja DiMino, ID NUMBER: 999834286, GRADE: 02 / 02, DATE OF BIRTH: 8/18/2013, GENDER: F, STREET: 22389 BARTLETT DR, CITY: Rock View, STATE: OH, ZIP: 99916. There are also checkboxes for "Will the child be 14 years old before the end of this IEP?" and "Is the child a ward of the state?". A text field for "if yes, provide the name of the surrogate parent" is also present. Annotations with boxes highlight the "NAME" field as "Read-only Fields on Web Forms" and the "GRADE" dropdown and "DATE OF BIRTH" field as "Editable Fields on Web Forms".

Read-Only and Editable Fields on Web Forms

Expandable Fields on Web Forms

On Web forms, expandable fields appear two text-line high. As you type, scroll bars appear on the right side of the field. When you are finished, click outside the field; the field expands; and the scroll bars disappear.

The screenshot shows an IEP Individualized Education Program form. The title is "IEP Individualized Education Program". The form is from Woodland Hills School District, with the user name "Nora Iannuzzi". The form has buttons for "Check Spelling", "Print & Save", "Save & Close", and "Save Form". The main section is "7 DESCRIPTION(S) OF SPECIALLY DESIGNED SERVICES". Below this, there is a table with columns: "TYPE OF SERVICE:", "GOAL(S) ADDRESSED:", "PROVIDER TITLE:", and "LOCATION OF SERVICES:". The "SPECIALLY DESIGNED INSTRUCTION:" field is highlighted with a box and a scroll bar. An annotation points to the scroll bar with the text: "Scroll bars appear as you type. Click outside the field, and the field expands." Below the table, there is a larger text area for "7 DESCRIPTION(S) OF SPECIALLY DESIGNED INSTRUCTION:" with a scroll bar. The text in this area is: "This is to show an expandable field. This is to show an expandable field. This is to show an expandable field. This is to show an expandable field. This is to show an expandable field. This is to show an expandable field. This is to show an expandable field. This is to show an expandable field. This is to show an expandable field. This is to show an expandable field." An annotation points to the scroll bar with the text: "to show an expandable field. This is to show an expandable field."

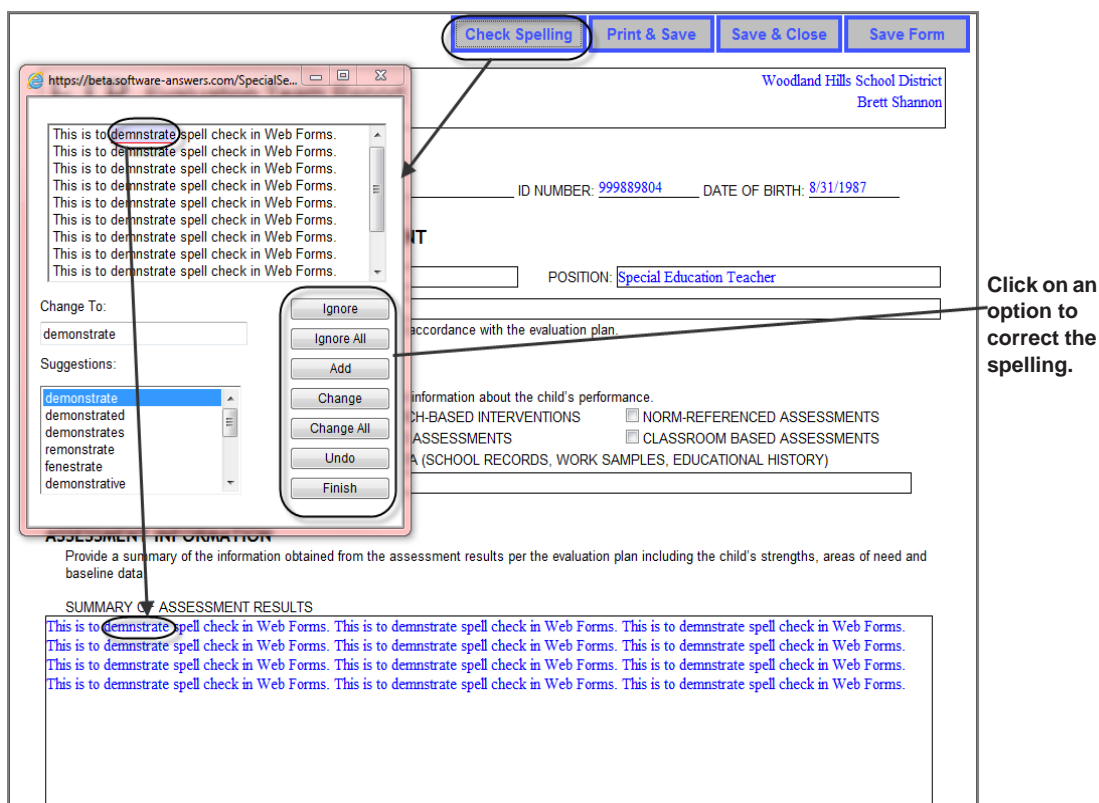
Expandable Fields on Web Forms

Spell Check for Web Forms

Spell check is now available for Web forms. Click Check Spelling, and a window displays that checks the spelling in every text box on the form. You have the option to select the following in the window:

- Ignore
- Ignore All
- Add
- Change
- Change All
- Undo
- Finish

Note: For Internet Explorer and Firefox users, Change All will correct all occurrences on the form of the misspelled word, and Ignore All will ignore all occurrences on the form of the misspelled word. For Safari users, Change All will correct all occurrences in the text box of the misspelled word, and Ignore All will ignore all occurrences in the text box of the misspelled word.



Spell Checking Web Forms


Save Pages

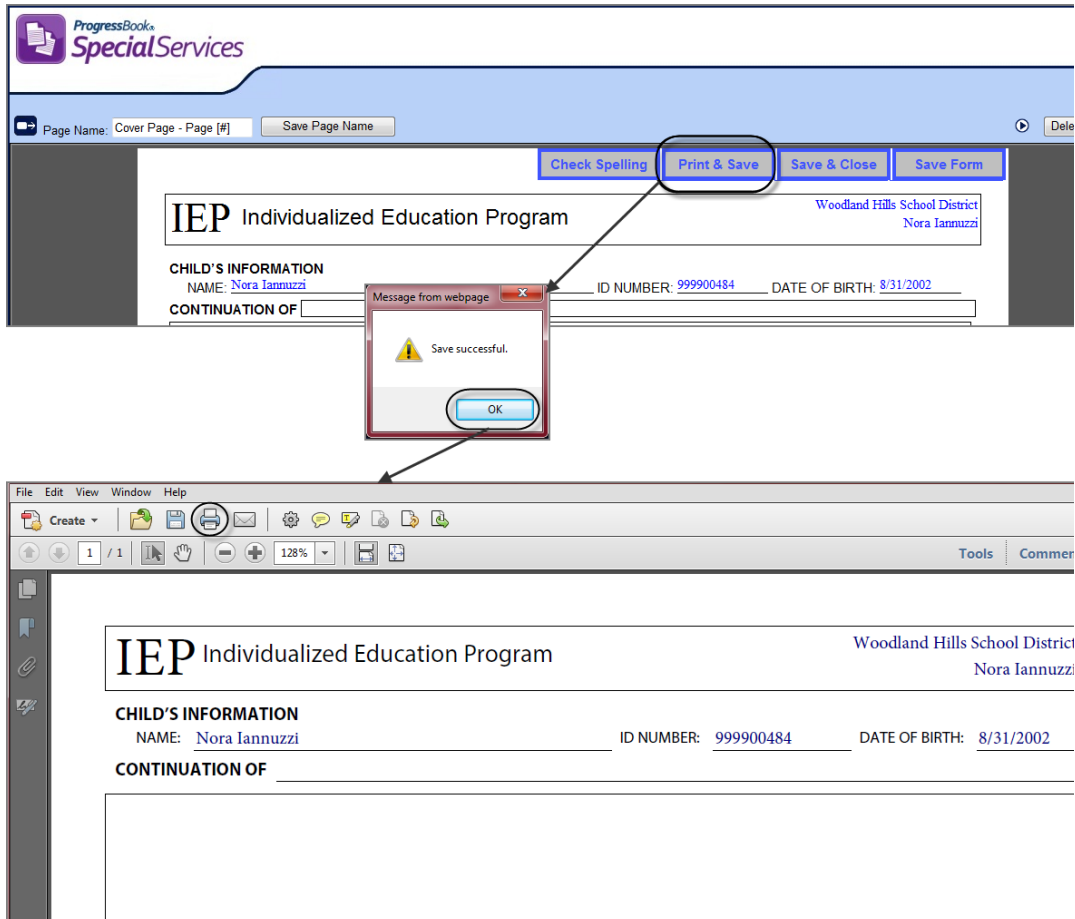
One or more users may have a page open at one time. However, SpecialServices only stores the information entered on the page for the first user to save the page. Therefore, if multiple users are editing the page and one user saves the page first, the information entered by all other users will not be stored. After the information on the page is stored, the saved copy becomes the most current page, and the system will not store any other open copies of the page. In this case, the following message displays, "Checked out page is no longer the current page. Unable to save changes."

Make sure that you do not begin editing a page already opened by another user. To verify that the page is not already opened by another user, check the Open By column for the page on the Open Tasks screen.

Note: Make sure that the user displayed in the Open By column still has the page open. The field will not update if the user closed the Web browser instead of clicking the Close button on the Page Edit screen or the Web server running SpecialServices recently experienced network "hanging."

The following options are available for Web forms when saving changes you have made to a page on the Page Edit screen:

- Click  to print the page and save the changes. When you click the button, a Message from the webpage displays stating the form has saved successfully. Once you click OK on the Message from webpage, the form appears in another window as a PDF where you can click the print button to print the page.



Print & Save a Web Form

- Click **Save & Close** to save the page and close the Page Edit screen. When the page closes, the Open Task screen displays.
- Click **Save Form** to save changes and continue editing the page.

On Web forms, the buttons remain stationary at the top of the screen as you scroll to the bottom of the screen.



Print & Save, Save & Close and Save Form Buttons on Page Edit Screen for Web Form

System Time Out

If you click one of the save buttons and the system prompts you to sign in, SpecialServices has timed out due to a period of inactivity exceeding the time limit defined by your district. For more information, see *“Automatic Sign Out.”*

Close Pages

1. When you are finished adding information to a page on the Page Edit screen, save the page using one of the save options specified in *“Save Pages.”*
2. Click **Close** on the banner.
The message displays, “You must click the save button on the form to save the form data. Are you sure you want to continue?”
3. To continue closing the page, click **OK**.
The Page Edit screen closes, and the Open Tasks screen displays.

Navigate to Pages on the Quick Task Menu

The **Quick Task Menu** on the **Page Edit** screen provides an easy way to navigate to all the pages associated with a task without returning to the **Open Tasks** screen.

1. In the **Page Edit** screen toolbar, click  to slide open the **Quick Task Menu**.

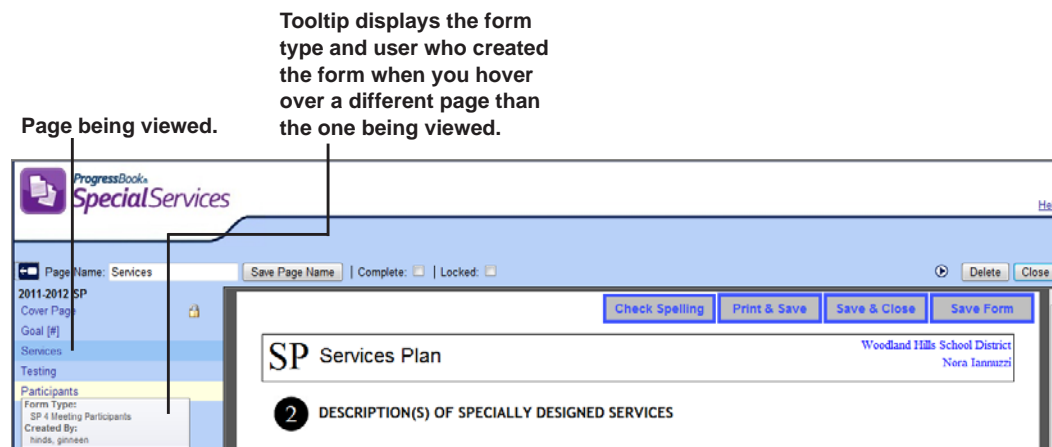
The selected page is highlighted by a blue rectangle. This page remains highlighted until you select a different page.

- To select another page in the **Quick Task Menu**, when you hover over the page name it is highlighted with a yellow rectangle until you click the page name. Click the page name.

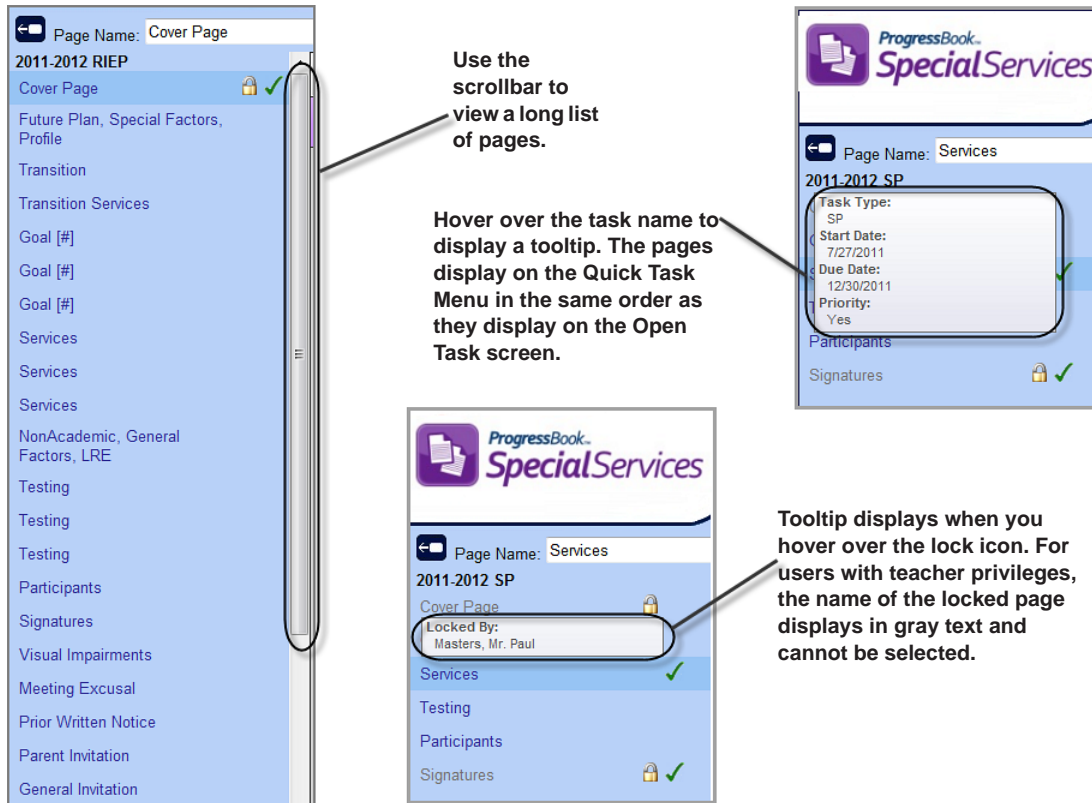
The following message displays, “You must click the save button on the form to save the form data. Are you sure you want to continue?”

- To continue, click **OK**, the current page closes, and the newly selected page opens.

Note: The Quick Task Menu and banner remain in the open state in which they were when saved and while navigating.




Quick Task Menu on the Services Page



Quick Task Menu Features

Import Parent Information

When editing the Parent Invitation Form, you can import parent contact information if it exists on the Student Properties window.

1. With the Parent Invitation Form open on the Page Edit screen, click  in the Page Edit screen toolbar.


The following message displays, “You must click the save button on the form to save the form data. Are you sure you want to continue?”

2. Click **OK** to open the Import Parent Information window.

The parent name and address for both the primary and secondary parent displays on the Import Parent Information window, if it exists.



Import Parent Information Window

3. Select the parent's information you want to import.
4. Click .

The Import Parent Information window closes, and the parent contact information displays on the Parent Invitation Form.

Imported Parent Contact Information on the Parent Invitation Form

5. Save the page using one of the save options specified in “Save Pages.”

Import Phrases from Bank

When editing the pages of an IEP, you can apply stored phrases from the User and District Banks to complete the IEP 6 Measurable Annual Goals and IEP 12 Statewide and District Testing pages. The District Banks contain common phrases provided by the administrators in your district. You can define your own phrases in the User Banks and apply them to your forms. See “Select Students.”

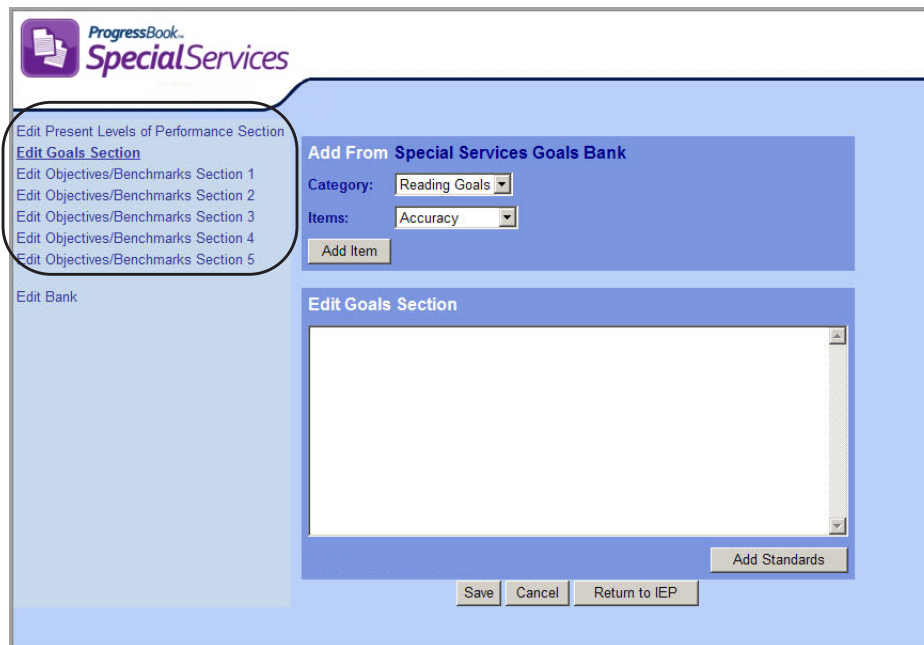
1. With the desired page open on the Page Edit screen, click **Save Form** to save any changes you have made to the page.

Note: You will lose any changes you have recently made if you do not save the page before importing phrases from the banks.

2. Click **Bank Import**.
3. On the message prompting you to ensure you have saved the form, click **OK**.

The Edit Section screen displays with links along the left for the sections of the page into which you can import phrases from the Bank.

Note: The Edit Section screen also contains the Edit Bank link from which you can edit the User Banks. You can copy phrases used on the current form to the User Banks. See “Set Up User Banks.”



Links for IEP Section on Edit Section Screen

4. If multiple links are displayed, click the link for the **IEP section** to which you want to add phrases from the bank.
The Add From Bank selection area displays the bank name, and the Category and Item lists are populated with the categories and items for the selected bank.
5. Select the **category** that contains the item you want to add to the page in the Category list.
6. Select the **item** that contains the text you want to add to the page, and then click **Add Item** in the Items list.

The text of the item appears in the Edit Section field.

Add From Bank Selection Area on Edit Section Screen

7. Click **Save** before making additional changes to the section.
8. You can also perform any of the following optional actions:
 - Enter additional text in the Edit Section field, if necessary.
 - Add state standards. See *“Add Standards.”*
9. When you are done editing the selected section, click **Save**.
10. To continue importing phrases from the banks for other sections of the IEP, repeat step 4 through 9.
11. Click **Return to IEP**.

The section you completed now displays on the appropriate section on the IEP page as you entered it.

New Text from Banks on IEP Page

Add Standards

When editing IEP forms, you can import state academic standards into the IEP 6 Measurable Annual Goals and IEP 12 Statewide and District Testing pages. The academic standards are imported using the same Edit Section box that you would use to import items from the Banks.

1. With the desired page open on the Page Edit screen, click **Save Form** to save any changes you have made to the page.

Note: You will lose any changes you have recently made if you do not save the page before importing phrases from the banks.

2. Click **Bank Import**.
3. On the message prompting you to ensure you have saved the form, click **OK**.

The Edit Section screen displays with links along the top for the sections of the IEP form to which you can import phrases from the Bank.

Note: The Edit Section screen also contains the Edit Bank link from which you can edit the User Banks. You can copy phrases used on the current form to the User Banks.

4. Click the link for the **IEP section** to which you want to add standards, if different than the section currently displayed.
5. Click **Add Standards**.

Add Standards Screen

6. On the Add Standards screen, select the **content area** for the standard you want to add to the IEP form in the Content Area list.
7. Select the appropriate **grade level** for the standard you want to add in the Grade Level list.
The standards for the selected content area and grade level display on the Add Standards screen.

Standard ID	Description	Grade Level
S01. Phonemic Awareness, Word Recognition and Fluency (PK-03)		
A. Use letter-sound correspondence knowledge and structural analysis to decode words. (PK-03)		
01	Identify rhyming words with the same or different spelling patterns. (02)	02
03	Blend phonemes (sounds) of letters and syllables to read unknown words with one or more syllables. (02)	02
04	Use knowledge of common word families (e.g., -ite or -ate) to sound out unfamiliar words. (02)	02
05	Segment letter, letter blends and syllable sounds in words. (02)	02
06	Distinguish and identify the beginning, middle and ending sounds in words. (02)	02
07	Identify words as having either short- or long-vowel sounds. (02)	02
B. Demonstrate fluent oral reading, using sight words and decoding skills, varying intonation and timing as appropriate for text. (PK-03)		
02	Read regularly spelled multi-syllable words by sight. (02)	02
08	Demonstrate a growing stock of sight words. (02)	02
09	Read text using fluid and automatic decoding skills. (02)	02
10	Read passages fluently with appropriate changes in voice, timing and expression. (02)	02
S02. Acquisition of Vocabulary		
A. Use context clues to determine the meaning of new vocabulary. (PK-03)		
01	Use knowledge of word order and in-sentence context clues to support word identification and to define unknown words while reading. (02)	02
B. Read accurately high-frequency sight words. (PK-03)		
04	Read accurately high-frequency sight words. (02)	02
C. Apply structural analysis skills to build and extend vocabulary and to determine word meaning. (PK-03)		
06	Determine the meaning of common compound words (e.g., lunchroom, baseball) by explaining the relationship between the words contained in the compound. (02)	02
07	Identify contractions and common abbreviations and connect them to whole words. (02)	02
08	Determine the meaning of prefixes, including un-, re-, pre-, and suffixes, including -er, -est, -ful, -less. (02)	02
09	Use root words (e.g., smiles) and their various inflections (e.g., smiles, smiling, smiled) to determine the meaning of words. (02)	02

Standards for Selected Content Area and Grade Level

8. Select the standards, benchmarks or indicators you want to add.

Note: The system automatically includes the levels above the selected item in the Edit Section field. For example, if you select an indicator, the system includes both the standard and the benchmark; if you select a benchmark, the system includes the standard.

9. Once you have selected all the applicable standards, click **Add Selected Items**.

The standards, benchmarks and indicators you selected display in the Edit Section field.

Add From Special Services Objectives Bank

Category:

Items:

Add Item

Edit Objectives/Benchmarks Section 1

OH. Ohio Academic Standards
CER. English Language Arts - Reading
S01. Phonemic Awareness, Word Recognition and Fluency
B. Demonstrate fluent oral reading, using sight words and decoding skills, varying intonation and timing as appropriate for text.
04. Demonstrate a growing stock of sight words.

Add Standards

Save Cancel Return to IEP

Selected Standards, Benchmarks and Indicators in Edit Section Field

10. Once you are done editing the text in the Edit Section box, click **Save**.
11. You can also perform any of the following optional actions:
 - Enter additional text in the Edit Section box, if necessary.
 - Import phrases from the Banks. See *“Import Phrases from Bank.”*
12. When you are done editing the selected section, click **Save**.
13. To edit additional sections of the IEP, repeat steps 4 through 12.
14. Click **Return to IEP**.

The completed sections now display on the IEP.

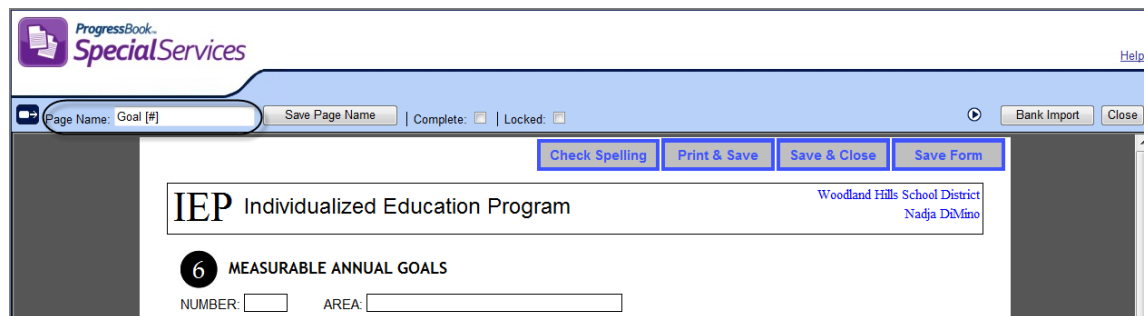
Rename Pages

When you create a new page, the system assigns a name by default. For example, the system assigns “Goal [#]” as the name for IEP 6 Measurable Annual Goals. You can change the name of the page to something more descriptive and easily recognizable to you and anyone else accessing the task.

Pages are sorted on the Open Tasks screen in alphanumeric order by name. Therefore, to change the order in which the pages display, you must assign names using numbers or letters to specify the sequence. For example, a page named “Goal 1” would display immediately before a page named “Goal 2” beneath the IEP 6 Measurable Annual Goals section of an IEP task on the Open Tasks screen. Likewise, a page named “Behavior Goals” would display before a page named “Reading Goals.”

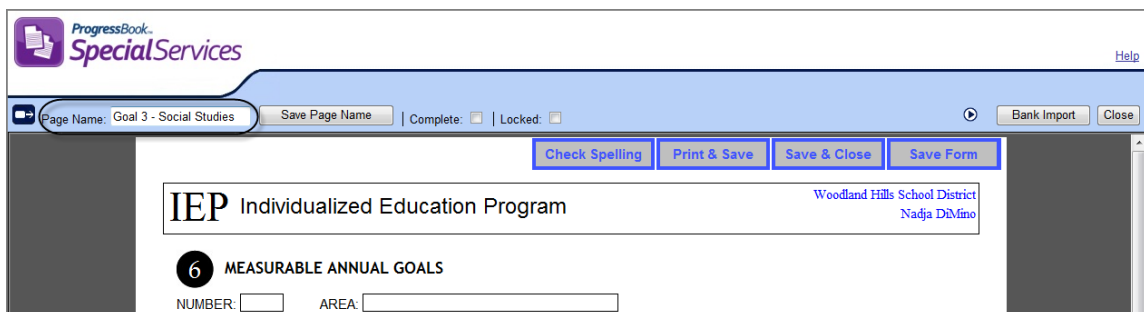
1. With the task displayed on the Open Tasks screen, click the **link** for the page you want to rename.

The selected page opens on the Page Edit screen.



Page Name Field on Page Edit Screen

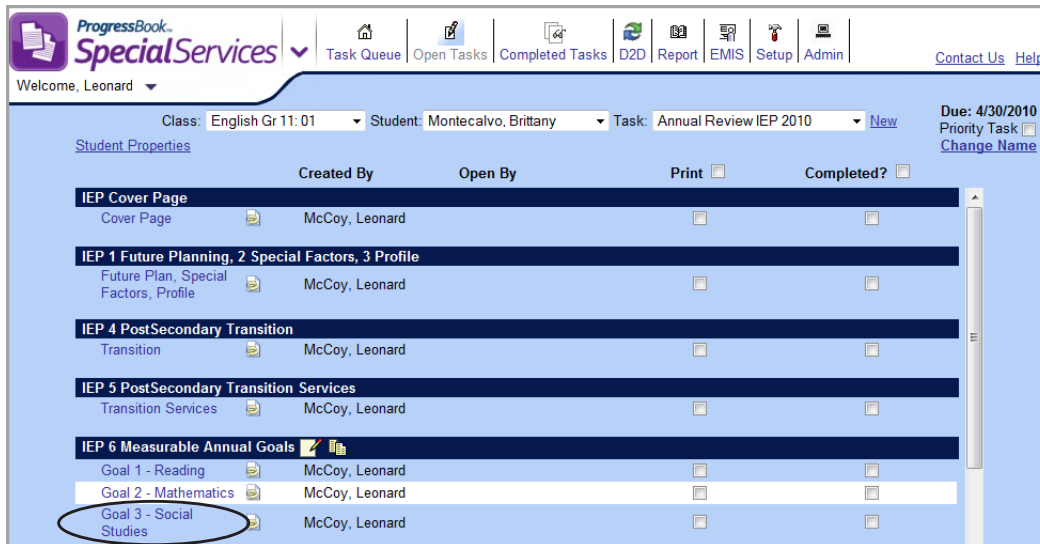
2. At the top of the editor window, modify the current name in the Page Name field as desired, and then click **Save Page Name**.
3. Click **OK** on the save confirmation message.



New Page Name

4. When you are finished working on the page, click one of the following buttons:
 - **Print & Save** – Prints the page and saves the changes.
 - **Save & Close** – Saves the changes you have made, and closes the Page Edit screen. When the page closes, the Open Tasks screen displays.
 - **Close** – Closes the Page Edit screen without saving. Select this option only if you have not made changes on the page that you want to save.

The new name displays as the link for the page on the Open Tasks screen.



Renamed Page

Lock Pages

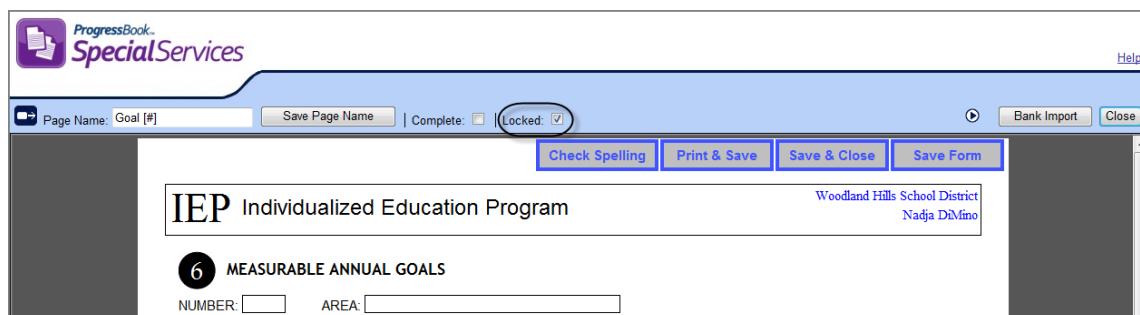
You can lock a page you are working on to prevent other users from viewing, editing, opening, printing or completing a page. You can only access a locked page if you are the user who locked the page or you have the appropriate security privileges.

1. With the desired task displayed on the Open Tasks screen, click the **link** for the page you want to lock.

The selected page opens on the Page Edit screen.


Note: When you lock the main page, any attachments are also automatically locked.

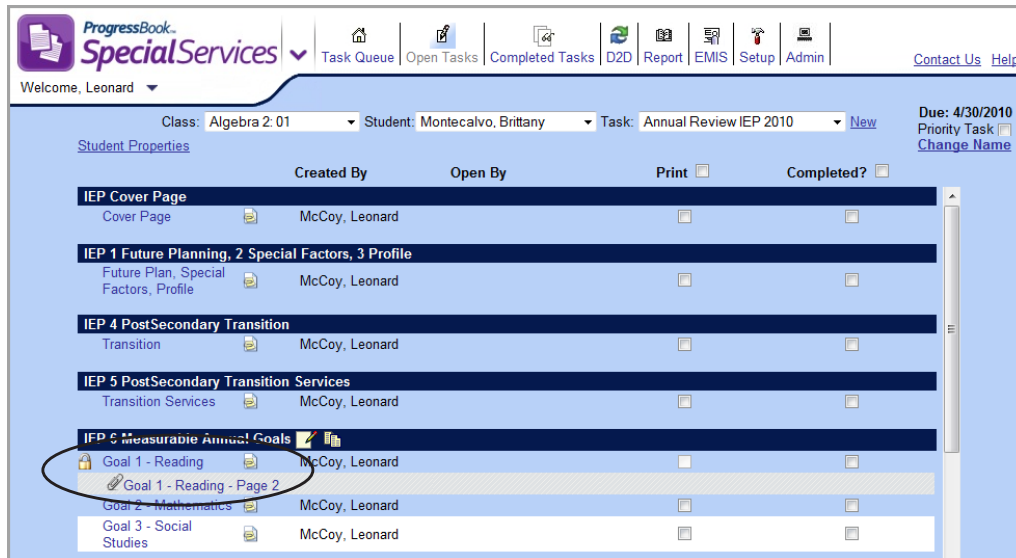
2. Select the **Locked** check box.



Locked Page

3. If you have no additional changes to make to the page, click **Close**.

On the Open Tasks screen,  displays next to the page name, indicating that the page is now locked. Any attachments associated to the page are also locked.




Locked Page and Attachment on the Open Tasks Screen

Unlock Pages

Only the user who locked the page or users with Confidential Override security privileges can unlock a page. All pages must be unlocked before you can complete a task unless you are the user who locked the page or you have Confidential Override security privileges.

1. With the desired task displayed on the Open Tasks screen, click the **link** for the page you want to unlock.
The selected page opens on the Page Edit screen.
2. Deselect the **Locked** check box.
3. If you have no additional changes to make to the page, click **Close**.

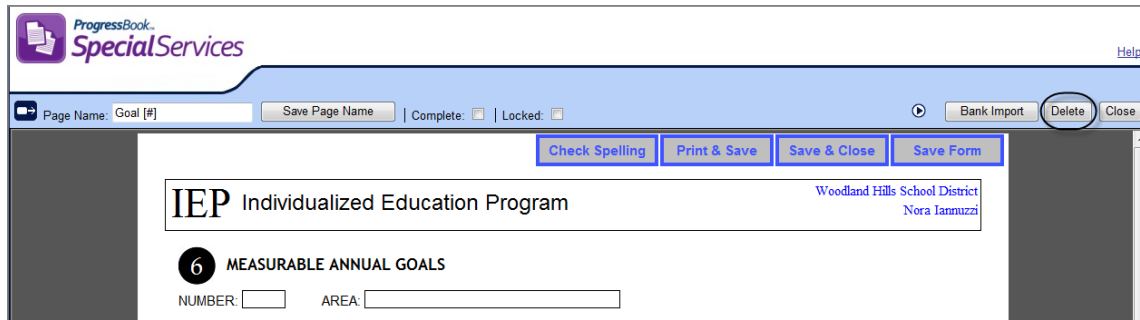
On the Open Tasks screen,  no longer displays next to the page name. Users can now open and edit the page or complete the task.

Delete Pages




If you have the appropriate security privileges, you can delete pages and attachment pages from a task. You can individually delete attachment pages; however, when you delete a page with an attachment, the attachment page is also deleted.

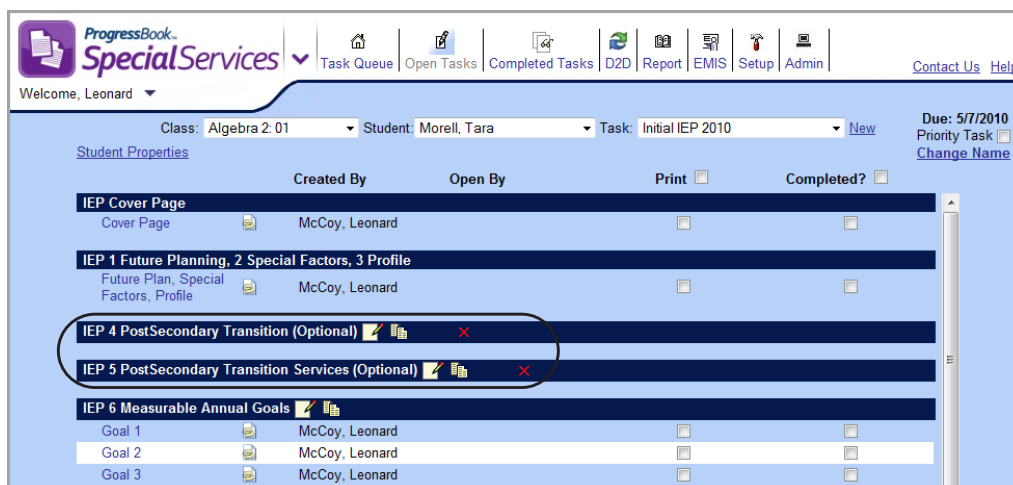
1. With the task displayed on the Open Tasks screen, click the **page** you want to delete.
The selected page opens on the Page Edit screen.
2. Click **Delete**.
A message displays, "You are about to delete this page from the task."
3. Click **OK**.

The Open Tasks screen displays, and the page you selected to delete, as well as any associated attachment pages, no longer appears on the screen.



Delete Button

Note: If the page you deleted was the only page for that type of form,  and  display to allow you to add a new page. If the page was for an optional form and you have the correct security privileges, you can delete the form from the task by clicking .

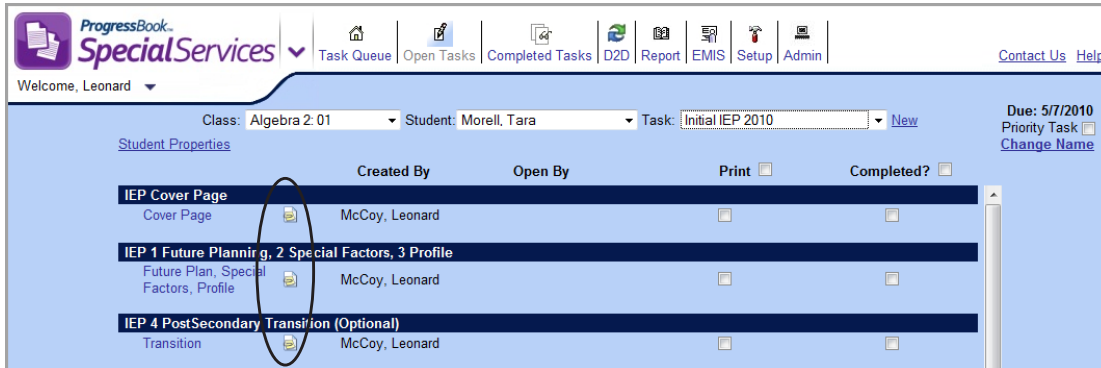


Delete Icon for a Form on the Open Tasks Screen

Add Attachments

You can add attachment pages to a specific page in an open task. When you select to print all of the pages in a task, the attachment appears in the merged document immediately after the page to which it is attached. When you select to print only the page, the attachment is automatically merged with the selected page.

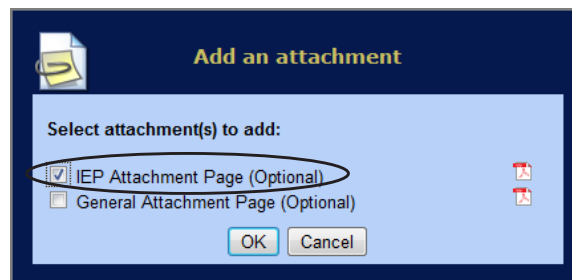
1. On the Open Tasks screen, select the appropriate **student**. See “Select Students.”
2. Select the appropriate **task** in the Task list.




Add Attachment Icon on Open Tasks Screen

3. Click  next to the page to which you want to add an attachment.

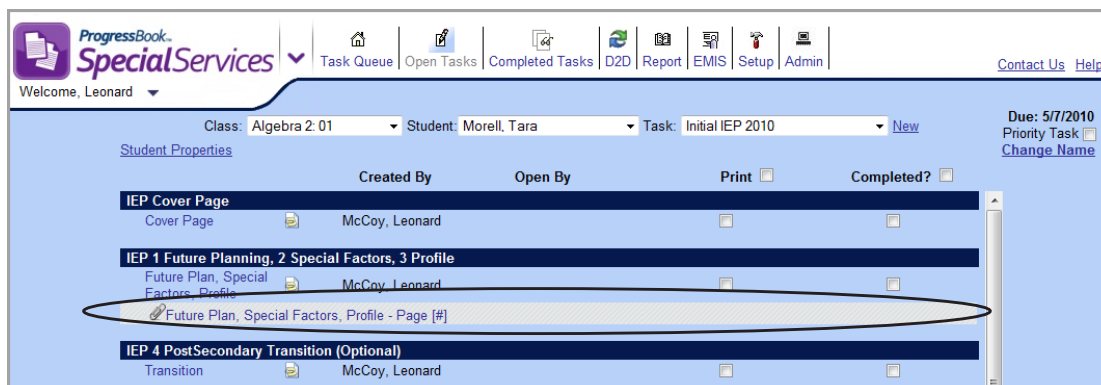
The Add an Attachment window displays, listing the forms that can be attached to the page.



Add an Attachment Window

4. To preview the form in a new window, click .
5. Click the **form name**, or select the **check box** next to the name of the form you want to attach.
6. Click **OK**.

The attachment displays in a row beneath the page to which it is now attached.



Attachment for the Future Planning, Special Factors, Profile Page

7. You can perform one of the following optional actions:
 - Click the **attachment name** to open the attachment and begin working on it. See “Open Pages.”
 - Rename the attachment page. See “Rename Pages.”

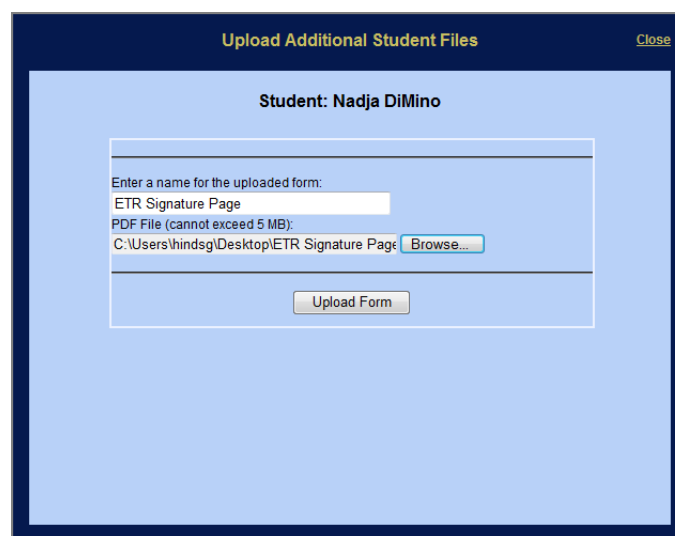
Note: The order in which an attachment displays beneath a page is determined by the name of the attachment. To change the order in which attachments display beneath the page to which they are attached, you must assign a name using numbers or letters to specify the sequence.

Note: Attachment pages are an extension of the page to which they are attached. Therefore, you can only lock or complete the attachment by choosing these options on the Page Edit screen when the associated page is open.

Upload Pages

You can upload additional pages to a task, such as the signature page for an evaluation, an example of the student’s work or scanned pages from participants in the task who do not have access to SpecialServices. Once the page is uploaded, it appears in the Uploaded Page section on the Open Task screen. You can view, but not edit, the page by clicking the link. Any pages you wish to upload must be in PDF format and no larger than 5 Megabytes.

1. On the Open Tasks screen, select the **student** for whom you want to upload a page. See “Select Students.”
2. Select the **task** to which you want to upload a page in the Task list.
3. Click **Upload a Page**.



Upload Additional Student Files Window

4. On the Upload Additional Student Files window, enter the **path and file name** of the page you want to upload in the File field; or click **Browse**, and select the file in the Choose file window.

- Enter the **name** you want to display on the Open Tasks screen for the uploaded page in the Enter a name for the uploaded form field.
- Click **Upload Form**.

Once the file is uploaded, it displays in the Uploaded Pages heading on the Open Tasks screen. You can view the page by clicking the link.



Uploaded Page on the Open Tasks Screen

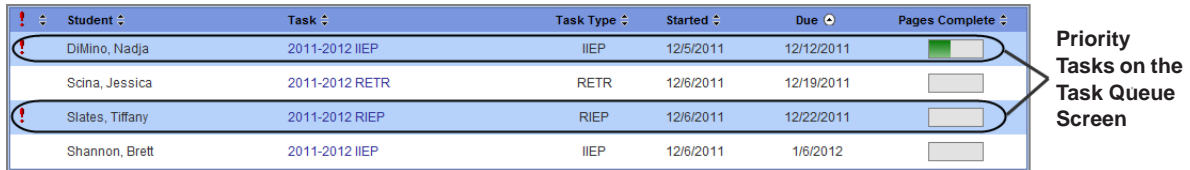
Delete Uploaded Pages

- With the task displayed on the Open Tasks screen, locate the Uploaded Pages heading, and then click **X** next to the uploaded page you want to delete.
The message displays, "This will permanently delete this uploaded page."
- Click **OK** on the message.

The selected page is deleted and no longer displays under the Uploaded Pages heading.

Add Tasks as Priority Tasks on the Task Queue Screen

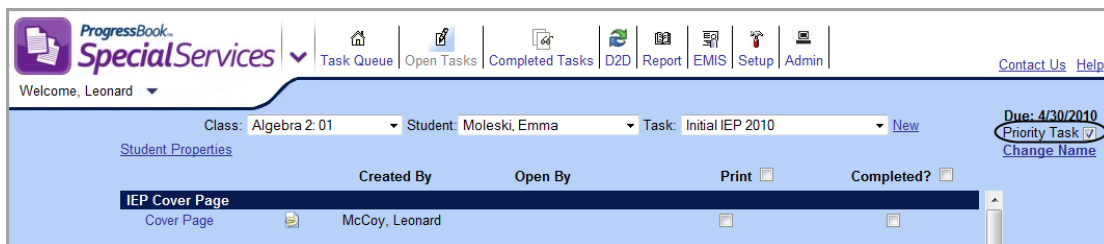
You can specify a task as priority, and it will display as a priority task on the Task Queue screen. The status applies only to your login account; other users will not see tasks you have selected as priority task unless they have also set the task as priority.



Student	Task	Task Type	Started	Due	Pages Complete
DiMino, Nadja	2011-2012 IIEP	IIEP	12/5/2011	12/12/2011	<input checked="" type="checkbox"/>
Scina, Jessica	2011-2012 RETR	RETR	12/6/2011	12/19/2011	<input type="checkbox"/>
Slates, Tiffany	2011-2012 RIEP	RIEP	12/6/2011	12/22/2011	<input type="checkbox"/>
Shannon, Brett	2011-2012 IIEP	IIEP	12/6/2011	1/6/2012	<input type="checkbox"/>

Priority Tasks on Task Queue Screen

To set a task as priority, select the **Priority Task** check box in the upper-right corner of the Open Tasks screen.



Priority Task Check Box on Open Tasks Screen

You can also designate a task as priority when you are creating a new task by selecting the **Add to my priority task list** check box on the Start a New Task window.

Start a New Task

Student: Dixon, Joseph

Task Template: IIEP - Initial IEP

Task Name: 2011-2012 IIEP

School Year: 2011-2012

Grade Level: 02

Compliance Due Date: 10/31/2011

Create from Previous Task:

Add to my priority task list

Start Task Cancel

Add to My Priority Task List Check Box on Start a New Task Window

Print Student Forms

The Print option on the Open Tasks screen merges the pages you select from a student's task into a single document and displays them in Adobe Acrobat Reader. You can then print the document on a local printer.

The pages are merged in the order in which they appear on the Open Tasks screen. To change the order in which the pages display in the printed document, you must rename the pages. See *"Rename Pages."*

Note: You cannot print a page if it is locked by another user. For more information about locked pages, see *"Lock Pages."*

1. On the Open Tasks screen, select the **student** for whom you want to print forms. See *"Select Students."*
2. Select the **task** that contains the forms you want to print in the Task list.
3. Perform one of the following actions:
 - To print specific pages, select the Print **check box** in the row of each page you want to print.
 - To print all of the pages, select the Print **check box** at the top of the column.

Select to print all pages. Select to print a specific page.

Task Name	Created By	Open By	Print	Completed?
ETR Cover Page				
Cover Page	McCoy, Leonard		<input checked="" type="checkbox"/>	<input type="checkbox"/>
ETR 1 Individual Assessment				
Assessment - Psychologist	McCoy, Leonard		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assessment - Speech Therapist	McCoy, Leonard		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ETR 2 Team Summary				
Team Summary	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
Team Summary - Page 2			<input type="checkbox"/>	<input type="checkbox"/>
ETR 3 Specific Learning Disability (Optional)				
Determination SLD	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
ETR 4 Eligibility				
Eligibility	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
ETR 5 Signatures				
Signatures	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
ETR Evaluation Plan School-Age				
Evaluation Plan	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
Special Ed Events				
Special Ed Events	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>

Options for Printing Pages on the Open Tasks Screen

4. Click **Print**.


The selected pages are merged into a single document.

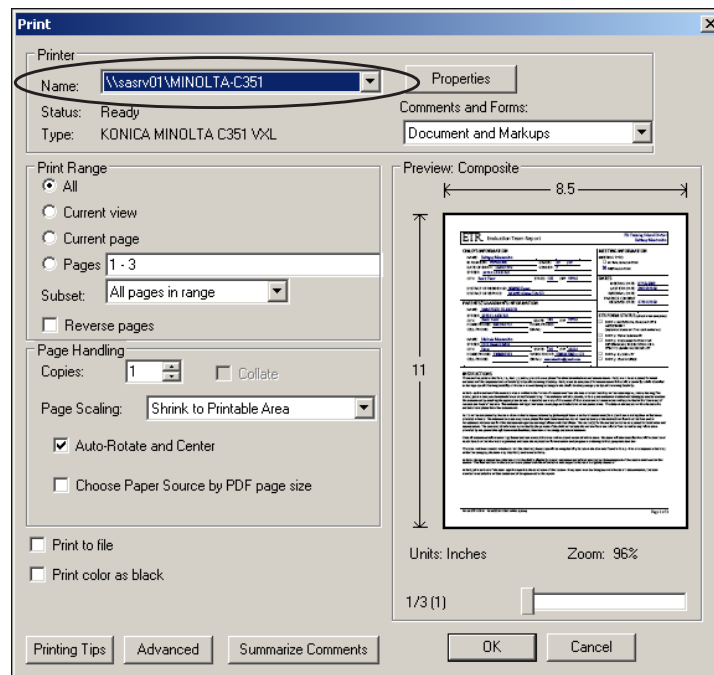
5. Select **Open** to open the document on the File Download window.

Note: You could also select **Save** to save the merged document to the desired location on your computer.

The merged document displays in Adobe Acrobat Reader. The pages are arranged and automatically numbered in the order in which they display on the Open Tasks screen.

Print Button

6. Select **File > Print**, or click  on the toolbar of the Adobe Acrobat Reader window. The Print window displays.



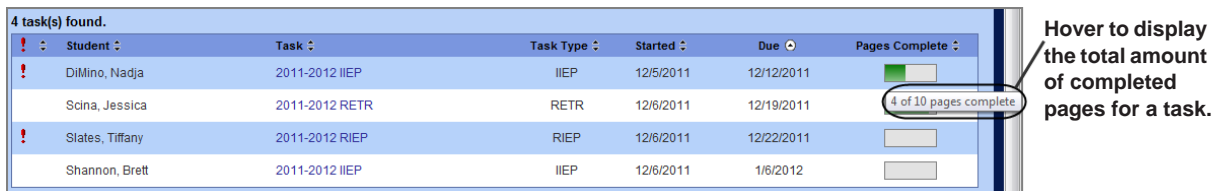
Printer Selection

7. Select the appropriate printer in the Name field, and then click **Print**.
8. Close Adobe Acrobat Reader to return to the Open Tasks screen.

Complete Pages

As you finish editing pages, you can mark each page as complete. On the Task Queue screen in the Pages Complete column, the green shading represents the amount of pages completed for that task. If you hover over the shading, the number of completed pages out of the total pages for the task displays. Once all of the pages are marked as complete, you can complete the task, which removes it from the Task Queue screen.

***Note:** Attachments are an extension of the page to which they are attached. Therefore, the option to complete a page is only available for the original page.*



Student	Task	Task Type	Started	Due	Pages Complete
DiMino, Nadja	2011-2012 IIEP	IIEP	12/5/2011	12/12/2011	<div style="width: 40%; background-color: green;"></div>
Scina, Jessica	2011-2012 RETR	RETR	12/6/2011	12/19/2011	4 of 10 pages complete
Slates, Tiffany	2011-2012 RIEP	RIEP	12/6/2011	12/22/2011	<div style="width: 0%; background-color: green;"></div>
Shannon, Brett	2011-2012 IIEP	IIEP	12/6/2011	1/6/2012	<div style="width: 0%; background-color: green;"></div>

Pages Complete Column on the Task Queue Screen

You can complete a page using either of the following methods:

- On the Open Tasks screen, click the Completed? **check box** in the row of the page you want to mark as complete. To mark all the pages as complete, click the Completed? **check box** at the top of the column.
- With the page open on the Page Edit screen, click the **Completed? check box**.

Select to complete a specific page.
Select to complete all pages.

Task Name	Created By	Open By	Print	Completed?
ETR Cover Page				
Cover Page	McCoy, Leonard		<input type="checkbox"/>	<input checked="" type="checkbox"/>
ETR 1 Individual Assessment				
Assessment - Psychologist	McCoy, Leonard		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Assessment - Speech Therapist	McCoy, Leonard		<input type="checkbox"/>	<input checked="" type="checkbox"/>
ETR 2 Team Summary				
Team Summary	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
Team Summary - Page 2			<input type="checkbox"/>	<input type="checkbox"/>
ETR 3 Specific Learning Disability (Optional)				
Determination SLD	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
ETR 4 Eligibility				
Eligibility	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
ETR 5 Signatures				
Signatures	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
ETR Evaluation Plan School-Age				
Evaluation Plan	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>
Special Ed Events				
Special Ed Events	McCoy, Leonard		<input type="checkbox"/>	<input type="checkbox"/>

Options for Completing Pages on the Open Tasks Screen

Page Name: Goal [#] Save Page Name **Complete** Locked: Bank Import Close

IEP Individualized Education Program Woodland Hills School District
Brett Shannon

6 MEASURABLE ANNUAL GOALS
NUMBER: AREA:

Check Spelling Print & Save Save & Close Save Form

Complete Check Box on the Page Edit Screen

Verify EMIS

You can view or print the EMIS Data Collection Form to verify that the information is complete for the student and to maintain a hard-copy record of the information that will be sent to the EMIS Extract. The EMIS Data Collection Form only displays EMIS reportable information for the current task.

Note: To view the EMIS Data Collection Form for a completed task, you must run the EMIS Review Report. See “View the EMIS Data Collection Form for Completed Tasks.”

1. On the Open Tasks screen, select the student for whom you want to view the EMIS Data Collection Form. See “Select Students.”
2. Select a task.
3. Click **Verify EMIS**.

Note: The Verify EMIS button is only enabled for the current task if the task contains information that is reportable to EMIS. If you hover over the button when it is disabled, the following tool tip displays: "EMIS is not reportable for this task type."

The EMIS Data Collection Form opens in a new browser window and displays the most current EMIS reportable information about the current student and task.

ProgressBook SpecialServices

Help

Close

Comment Share

EMIS Data Collection Form for Students with Disabilities

Woodland Hills School District
Nora Iannuzzi

CHILD'S INFORMATION

NAME: Nora Iannuzzi DISTRICT OF RESIDENCE: _____
 ID NUMBER: 999900484 GRADE: 09 /09 DISTRICT OF SERVICE: _____
 DATE OF BIRTH: 8/31/2002 GENDER: F DISABILITY CATEGORY: **** Not Applicable**
 BUILDING OF ATTENDANCE: Hometown High School DISABILITY START DATE (if changed): _____

SPECIAL EDUCATION EVENTS

CODE	EVENT DATE	OUTCOME ID	START DATE	END DATE	NON-COMPLIANCE ID
PSTC		---	---	---	---
RFRL		---	---	---	---
CNST			---	---	---
IETR			---	---	
IIEP					
RETR			---	---	
RIEP					
TETR					---
TIEP					---
FIIEP		---	---	---	
CIIEP		---	---	---	

EMIS Data Collection Form for an Open Task

4. Click **Close** to return to the Open Tasks screen.

Complete Tasks

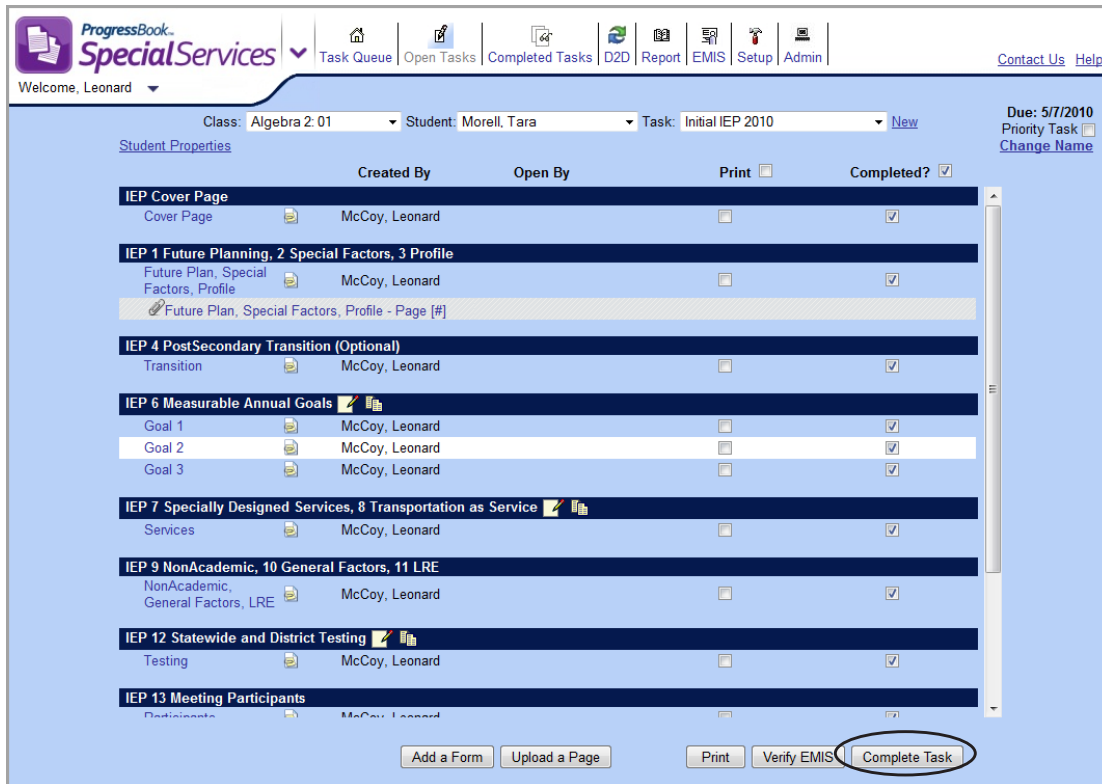
Once all of the pages are marked as complete if you are assigned the appropriate security role, you can complete the task and merge the pages into a read-only form set that is viewable from the Completed Tasks screen. It is important to complete a task when all the pages are complete for the following reasons:

- Users with read-only security privileges can view the forms within the task.
- You or other users can start the next cycle of forms for the task. You cannot open a new task if a task of the same type is currently open.
- You or other users can generate data using the EMIS Tools. The system only extracts EMIS data from completed tasks.
- You or other users can transfer a student's forms to another district. The District-to-District Transfer function only transfers forms from completed tasks.

You cannot complete a task if any of the pages are currently locked by another user. If you are the user who locked the page, you can complete the task because the system automatically unlocks the page during the complete task process. If you are not the user who locked the form, but you have the appropriate security privileges, you can also complete the task without unlocking any page; however, the system will warn you that a page is locked. It is recommended that you verify the locked page is complete before closing the task.

1. On the Open Tasks screen, select the **student** for whom you want to complete a task. See *"Select Students."*
2. Select the **task** you want to complete in the Task list.
3. Ensure all of the required pages for the task are marked as complete and none of the pages are currently locked by another user.
 - To mark a page as complete, see *"Complete Pages."*
 - To unlock a page, see *"Unlock Pages."*

Note: *If all of the required forms are marked as complete, the Complete Task button is active.*




Complete Task Button on Open Tasks Screen



4. Click **Complete Task**.

Once the task is completed, it appears in the list of completed tasks for the student on the Completed Tasks screen.

Note: SpecialServices uses Adobe Live Cycle Web Service to facilitate completing tasks. If you try to complete a task from the Open Tasks screen and the Live Cycle Web Service does not respond, the following message displays, “Form Printing, Task Completion, Viewing EMIS DCF is currently unavailable. Please try again soon. If problems persist please contact support.”

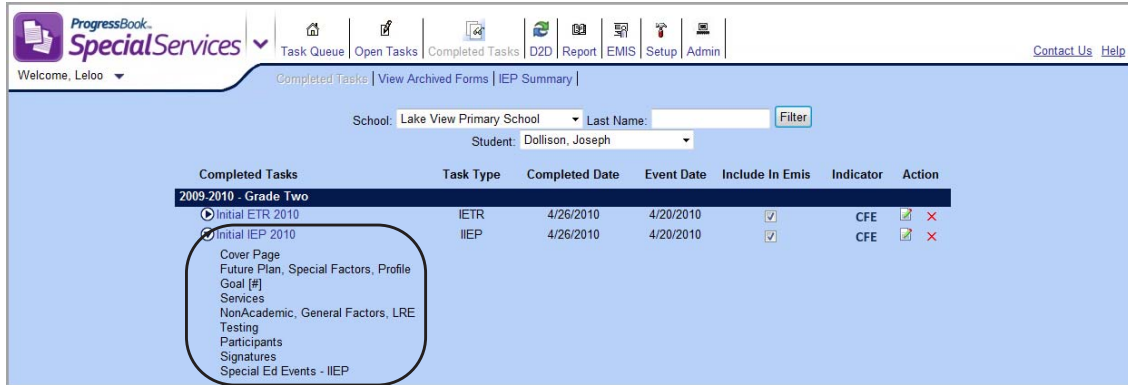
Completed Tasks

The Completed Tasks screen contains all of the completed tasks for a student, including any tasks or forms transferred from another district using the District-to-District Transfer tool. To access this screen, click **Completed Tasks**  on the banner.

By default, the completed tasks display collapsed so that you only see the name of the task. You can expand a task by clicking . The associated pages display below the task. Click  again to collapse a task.

From the Completed Tasks screen, you can perform the following actions:

- View completed tasks. See *“View Completed Tasks.”*
- Rename completed tasks. See *“Rename Completed Tasks.”*
- Delete completed tasks, if you have the appropriate security privileges. See *“Delete Completed Tasks.”*
- View forms created in Classic view or a version of SpecialServices prior to 9.1. See *“View Archived Forms.”*
- View a summary of the last completed IEP task including goals, objectives, services, etc. See *“View IEP Summary Report.”*



Expanded Task on Completed Tasks Screen


View Completed Tasks

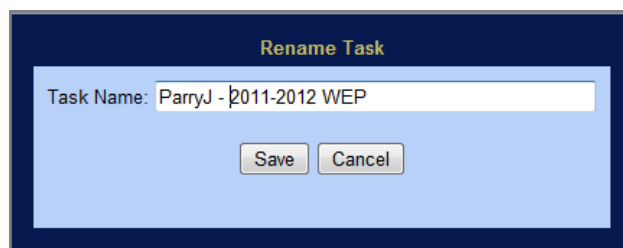
1. On the Completed Tasks screen, select the **student** whose completed tasks you want to view. See *“Select Students.”*
The completed tasks for the student display.
2. Click the **task** you want to view.
All of the pages that comprise the task display.

IEP Individualized Education Program		Woodland Hills School District Brett Shannon	
This IEP will be implemented during the regular school term unless noted in general factors.			
CHILD'S INFORMATION		MEETING INFORMATION	
NAME: <u>Brett Shannon</u>		MEETING DATE: <u>01/03/2012</u>	
ID NUMBER: <u>999889804</u> GRADE: <u>09</u> / <u>09</u>		MEETING TYPE:	
DATE OF BIRTH: <u>8/31/1987</u> GENDER: <u>M</u>		<input type="checkbox"/> INITIAL IEP	
STREET: _____		<input checked="" type="checkbox"/> ANNUAL REVIEW	
CITY: _____ STATE: _____ ZIP: _____		<input type="checkbox"/> REVIEW OTHER THAN ANNUAL REVIEW	
DISTRICT OF RESIDENCE: _____		<input type="checkbox"/> AMENDMENT	
COUNTY OF RESIDENCE: _____		<input type="checkbox"/> OTHER	
DISTRICT OF SERVICE: _____		<hr/>	
Will the child be 14 years old before the end of this IEP? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO		IEP TIMELINES	
Is the child a ward of the state? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO		ETR COMPLETION DATE: <u>01/27/2012</u>	
If yes, provide the name of the surrogate parent: _____		NEXT ETR DUE DATE: _____	

Completed Task Pages

Rename Completed Tasks

- On the Completed Tasks screen, select the **student** whose completed tasks you want to view.
The completed tasks for the student display.
- Click  in the row of the task you want to rename.
- On the Rename Task window, enter the **new name** in the Task Name field.



Rename Task Window

- Click **Save**.
The new name displays for the task on the Completed Tasks screen.

ProgressBook
SpecialServices

Welcome, Leonard

Completed Tasks | View Archived Forms | IEP Summary

Class: Algebra 2: 01
Student: Morell, Tara

Completed Tasks	Task Type	Completed Date	Event Date	Indicator	Action
2009-2010 - Grade Nine					
MorellIT - Initial IEP 2010	IIEP	4/23/2010		CFE	

Renamed Task on the Completed Tasks Screen

Delete Completed Tasks

Only users with the appropriate security privileges can delete completed tasks. When you delete a completed task, it is permanently removed from the system.

1. On the Completed Tasks screen, select the **student** for which you want to delete the task. See “*Select Students.*”

All of the completed tasks for the student display.

2. Click in the row of the task you want to delete.
3. On the deletion confirmation message, click **Delete**.

The task is removed from the list of completed tasks on the Completed Tasks screen.

View Archived Forms

You can view forms that were completed (finalized) in a version of SpecialServices prior to 9.1 or using the Classic View mode of SpecialServices 9.1. Archived forms are read-only.

1. On the Completed Tasks screen, select the **student** for which you want to view the archived forms. See “*Select Students.*”

The completed tasks for the student display.

ProgressBook
SpecialServices

Welcome, Leonard

Completed Tasks | **View Archived Forms** | IEP Summary

Class: Math - Gr 02: 01
Student: Dollison, Joseph

Completed Tasks	Task Type	Completed Date	Event Date	Indicator	Action
2009-2010 - Grade Two					
Initial ETR 2010	IETR	4/26/2010	4/20/2010	CFE	
Initial IEP 2010	IIEP	4/26/2010	4/20/2010	CFE	

View Archived Forms Link

2. Click **View Archived Forms**.

Completed Tasks

If there are completed forms for the student in the default form set type of IEP/EMIS Sets, they display below the selection fields on the Finalized Forms View screen.

Edit	Finalized Group Name	Finalized Date	District Required Set	Include In EMIS	Create From Existing	Select Form Group to View
	2006-8-4-IEP_FormSet-MK -1	8/4/2006 10:48:58 AM	True	True		

Finalized Forms View Screen

3. If forms for the student exist in another form set type, select one of the following **form set types** in the Choose Finalized Set Types list.

- **IEP/EMIS Sets** – Displays all completed (finalized) IEP form sets.
- **Other Sets** – Displays any other completed form sets.
- **Archived Form Sets** – Displays any completed form sets from a legacy version of SpecialServices.
- **All Finalized Form Sets** – Displays all completed form sets, including IEP and other form sets.

4. Click

The selected forms display.

INDIVIDUALIZED EDUCATION PROGRAM (IEP)

Effective IEP Dates from _____ to _____

Name Nadja DiMino Date of Birth 9/22/2003 Grade Level 2 Male Female

Student Identification Number 999834286 Meeting Date _____ Initial IEP Periodic Review

Child/Student Address 22389 BARTLETT DR Rock View OH 99916 Parent/Guardian MRS ELIZABETH ATCHISON

Parent Address _____ Home Phone 8883319830 Work Phone _____

District of Residence Demo - 000000 District of Service Demo - 000000

Step 1 Discuss future planning. (Family and student preferences and interests)

Step 2 Discuss present levels of academic and functional performance. (What do we know about this child, and how does that relate in the context of content standards, or for preschool children, in the context of appropriate activities and how the disability affects the student's involvement in the general education curriculum.)

Literacy Collaborative Testing took place in January of 2005 and the student's results were as follows:
Sentence Dictation: Earned 45/95 possible points; Dominic Reading Test: the student passed a level G (1st grade) with 88% comprehension and a 3 out of 4 in fluency. This was the highest level in which he passed the requirements of 92% or better accuracy in word recognition, 75% or higher in comprehension, and a 3 or 4 in fluency out of a 4 point scale.
The Brigance Inventory of Skills was given in February and the results received follow:
Listening Comprehension Vocabulary Subtest: Gr. 1- 100%, Gr. 2- 33%; Listening Comprehension Passages Subtest: Gr. 1- 100%, lower Gr. 2- 80%, upper Gr. 2- 60%, lower Gr. 3- 40%; Word Recognition: Preprimer- primer- 100%, Gr. 1- 90%, Gr. 2- 50%, Gr. 3- 40%, Gr. 4- 10%; Reading Comprehension Vocabulary Subtest: Gr. 1- 100%, Gr. 2- 67%, Gr. 3- 0% (couldn't read the words); Reading Comprehension Passages: Gr. 1- 100%, lower Gr. 2- 80%, upper Gr. 2- 60% (one correct answer was a complete guess); Spelling subtest- Gr. 1-2- 100%, Gr. 3- 60%, Gr. 4- 0%; Math Computational Skills subtest: Gr. 1- 75%, Gr. 2-4- 25% (could have and should have scored higher but made simple calculation errors); Problem Solving Subtest: Gr. 1- 100%, Gr. 2-3- 50%, Gr. 4- 0%
He is a pleasant and very hard working student. He always tries to do his best no matter how hard the material gets. He does need many modifications to be successful in the regular classroom, but with those has been very successful. Even though he qualifies for SLD in reading and language, it is documented that he will need help and modifications in math as well as his other subjects.


Selected Archived Forms

5. When you are finished viewing the form set, close the browser.

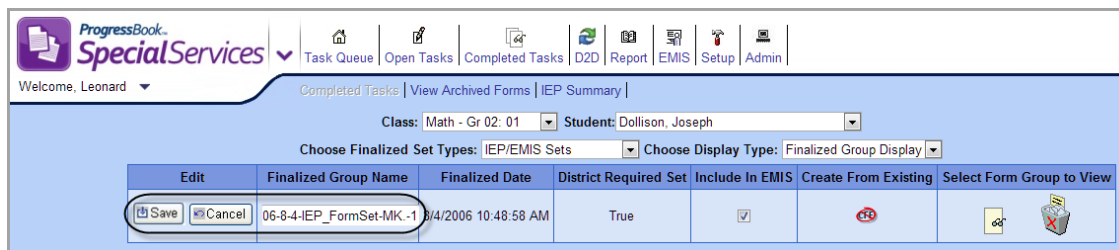
6. On the Finalized Forms View screen, you can also perform the following actions:
 - Rename the form set, as described in “Rename Archived Forms.”
 - Remove the archived form set, as described in “Delete Archived Forms.”




Rename Archived Forms

You can change the name of archived forms as desired.

1. On the Finalized Forms View screen, select the **student** whose form set you want to rename in the Student list.
2. Click  next to the form set you want to rename.

Save and Cancel buttons display in the Edit column of the selected form set, and the cell beneath the Finalized Group Name field becomes editable.

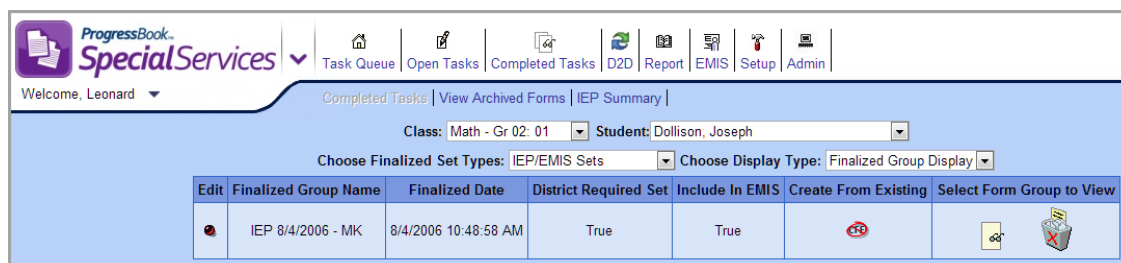






Edit	Finalized Group Name	Finalized Date	District Required Set	Include In EMIS	Create From Existing	Select Form Group to View
Save Cancel	06-8-4-IEP_FormSet-MK-1	8/4/2006 10:48:58 AM	True	<input checked="" type="checkbox"/>		 

Finalized Group Name Field on Finalized Form View Screen

3. Enter a **new name** in the Finalized Group Name field.
4. Click **Save**.

The new name displays in the Finalized Group Name field for the form set.




Edit	Finalized Group Name	Finalized Date	District Required Set	Include In EMIS	Create From Existing	Select Form Group to View
	IEP 8/4/2006 - MK	8/4/2006 10:48:58 AM	True	True		 

New Archived Form Name

Delete Archived Forms

Only users with the appropriate security privileges can permanently delete archived forms.

1. On the Finalized Forms View screen, select the **student** whose form set you want to remove in the Student list.
2. Click  next to the row of the form set you want to delete.

The message displays, "Are you sure want to delete this form package?"

3. Click **OK** on deletion confirmation message.

The form set is removed from the list of archived form sets.

View IEP Summary Report



The IEP Summary Report is a summary of the last completed IEP task including, goals, objectives, services, etc.

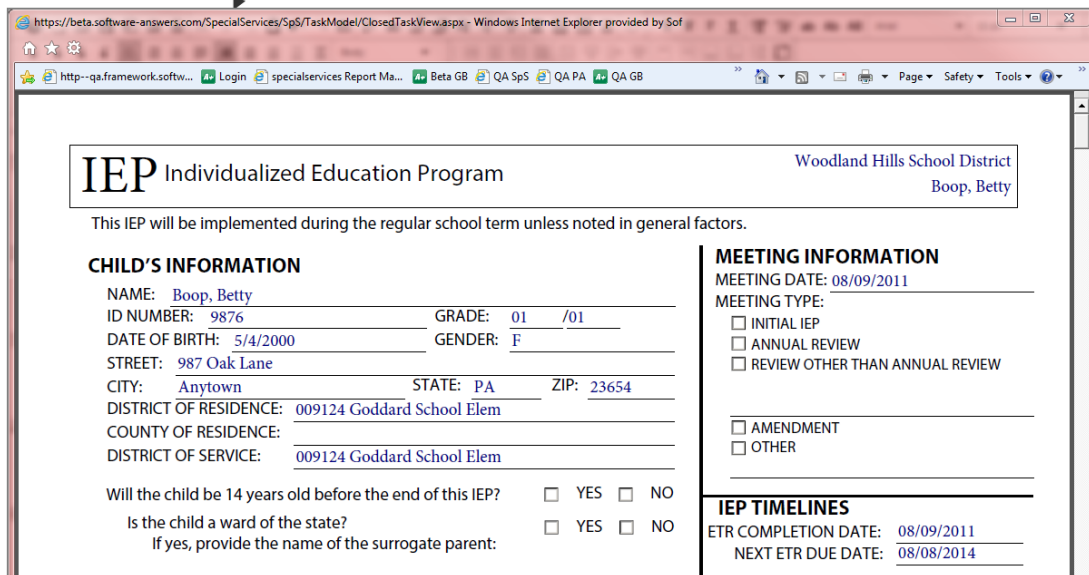
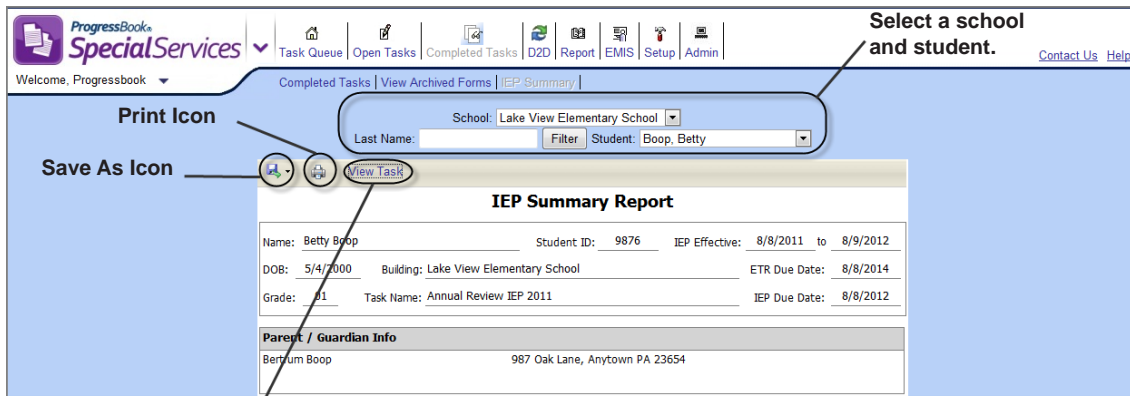
1. On the Completed Tasks screen on the right side of the View Archived Forms link, click the **IEP Summary link**.

The IEP Summary Report displays for the student you are on when you navigate to the page.

2. From the School or Class list, select the **school** or **class**.
3. From the Student list, select the **student**.

You can also perform the following on the IEP Summary screen:

- Click  to save the IEP Summary Report as an Excel, PDF or Word file.
- Click **View Task** to view the task in another Window.
- For Internet Explorer users, click  to print the IEP Summary Report.



IEP Summary Report

This page intentionally left blank.

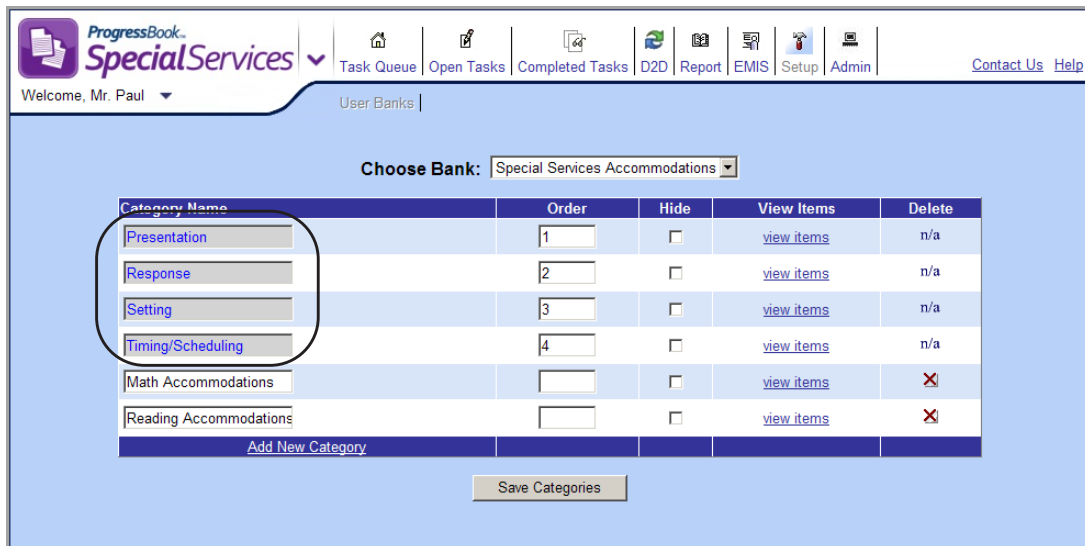
Set Up User Banks

SpecialServices provides the Present Levels, Goals, Objectives and Accommodations banks in which users can store a group of phrases repeatedly used to complete information on the IEP 6 Measurable Annual Goals and IEP 12 Statewide and District Wide Testing pages of the Individualized Education Plan (IEP) form.

Each bank consists of the following pieces:

- **Categories** – Describes the type of phrases you might use. For example, for the Objectives bank, you create a category called Math under which you would create phrases (items) that describe the student’s objectives or bench marks for achieving a particular goal.
- **Items** – Defines the phrase you would use on the IEP. For example, in the Math category in the Objectives bank, you create an item that states a specific bench mark or objective, such as “The student will identify/name/state value for coins.”

You can create and maintain categories and items in the User Banks for those phrases you commonly use in the indicated sections of the IEP form. Some categories and their associated items are defined by your district and can only be edited by users assigned an administrator role. These categories display shaded on the User Bank Setup screen, as shown in the following image. You can use items contained in the district-defined category on an IEP form as well as the ones you create in the User Banks.




District-Defined Categories on User Bank Setup Screen

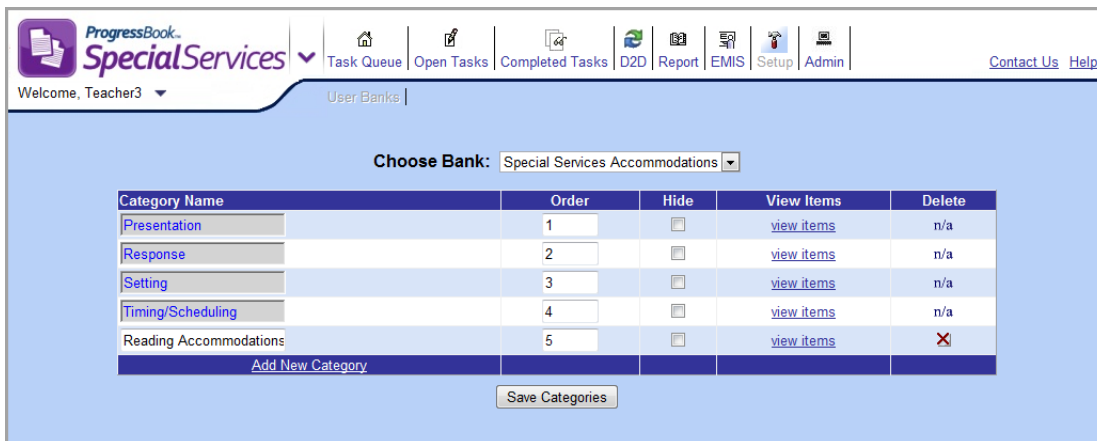
Add Categories to User Banks

You can add categories to the Accommodations, Goals, Objectives or Present Levels banks. Once you create a new category, you can enter for that category those phrases—called items—used to complete the corresponding section on the IEP form. You can access the User

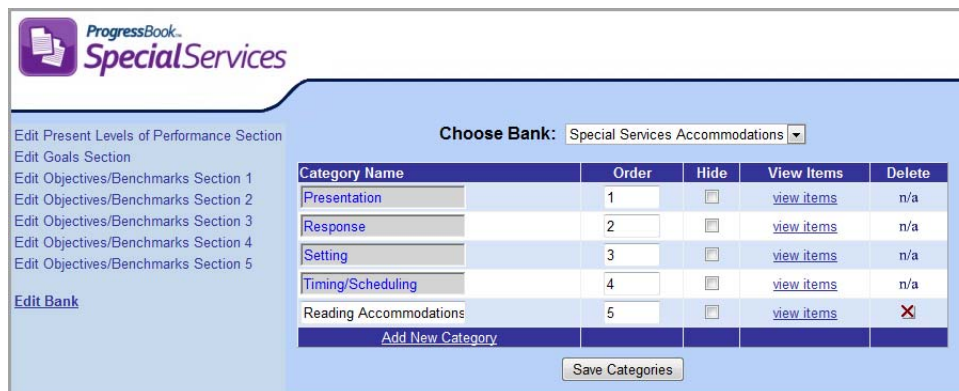
Bank Setup screen from the Edit Section screen when importing phrases onto the IEP or by clicking Setup from the toolbar on the SpecialServices toolbar.

1. On the banner, click **Setup** , and then click **User Banks**, or from the Edit Sections screen in an IEP, click **Edit Bank**.

The User Bank Setup screen displays with the categories for the SpecialServices Accommodations selected by default.



User Bank Setup Screen Accessed from Setup Screen



User Bank Setup Screen Accessed from Edit Section Screen

2. Select the appropriate **bank** to edit in the Choose Bank list:
 - **Special Services Accommodations** – Used in the Detail of Accommodations sections of IEP 12 Statewide and District Testing.
 - **Special Services Goals** – Used in the Measurable Annual Goal section of IEP 6 Measurable Annual Goals.
 - **Special Services Objectives** – Used in the Benchmarks/Objectives sections of IEP 6 Measurable Annual Goals.
 - **Special Services Present Levels** – Used in the Present Levels of Performance section of IEP 6 Measurable Annual Goals.
3. Click the **Add New Category** link at the bottom of the Categories grid.

A blank Category Name field appears at the bottom of the Categories grid.

Category Name	Order	Hide	View Items	Delete
Math		<input type="checkbox"/>	view items	n/a
Reading		<input type="checkbox"/>	view items	n/a
Study Skills		<input type="checkbox"/>	view items	n/a
Gross Motor				

Category Name Field for New Category

4. Enter a **name** for the new category in the Category Name field.
5. Click **Add New**.

The new category displays in the Categories grid in alphabetical order by the category name. The Order, Hide, View Items and Delete columns become available for the category.

Category Name	Order	Hide	View Items	Delete
Gross Motor		<input type="checkbox"/>	view items	
Math		<input type="checkbox"/>	view items	n/a
Reading		<input type="checkbox"/>	view items	n/a
Study Skills		<input type="checkbox"/>	view items	n/a
Add New Category				


New Category in Categories Grid

6. You can perform any of the following actions:
 - To change the sort order of the category, enter a **number** in the Order column that represents the position in which you want the category to appear. For example, entering “1” would place the category at the top of the list.
 - To hide a category so that it does not display in the Category list on the Edit Section screen when you are importing phrases to an IEP form, select the **check box** in the Hide column.
7. If you changed the sort order or chose to hide the category, click **Save Changes**.
8. Once you create a category, enter new items you want to store for the category. See *“Add Items to Bank Categories.”*

Delete Categories from User Banks

You can only delete those categories you created from the Accommodations, Goals, Objectives or Present Levels banks. The categories that appear in the shaded cells in the Categories grid are defined by your district, and you cannot delete them.

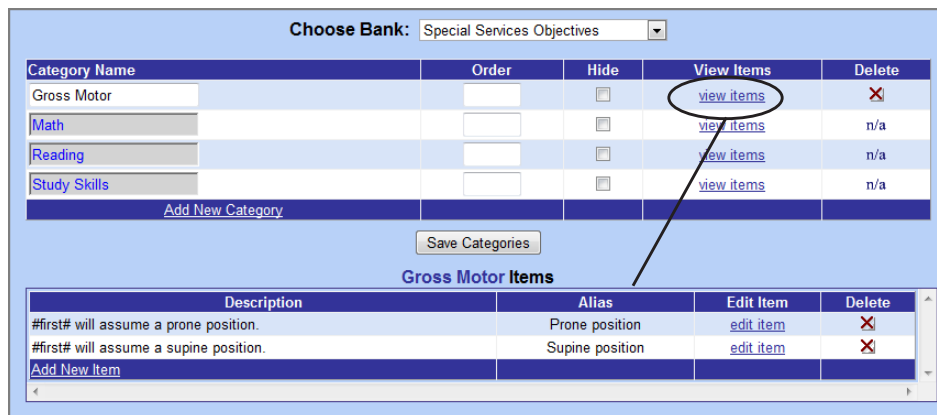
Note: When you delete a category, all of the items associated with the category are also deleted. This does not affect the items already imported onto existing forms.

1. On the User Bank Setup screen, select the appropriate **bank** from the Choose Bank list.
2. Click  in the row of the category you want to delete.
The message displays, “Are you sure you want to delete this category? This will permanently delete all of the items and user settings associated with this category.”
3. Click **OK** to confirm the deletion.
The category no longer displays in the grid on the User Bank Setup screen.

Add Items to Bank Categories

For each custom category, you can create items to define the phrases you want to use in certain sections of the IEP form. You can only add items for categories you have created. The categories that appear in the shaded cells on the Categories grid are defined by your district; you can view, but not edit, the items for these categories.

1. On the User Bank Setup screen, select the appropriate **bank** from the Choose Bank list.
2. Click the **view items** link in the row for the category to which you want to add a new item.
The Items grid appears below the Categories grid and displays the items, if any, associated to category.



Items for a Category on User Bank Setup Screen

3. Click the **Add New Item** link.
The Item window for the category displays.

Items Window

4. Enter a short **description** for the new item in the Alias field.

Note: The alias displays in the Items list on the Edit Section screen when you are adding the items to the IEP form. If you leave this field blank, the system displays the first several characters in the Description field. You would use the Alias field to distinguish an item if several of the items for this category begin similarly.

5. Enter the specific **phrase** you want to use for this category and bank in the Description field.

Note: SpecialServices provides codes you can use in the Description field, which will insert the student's name or the appropriate pronoun in the phrase when you import it on an IEP form. See "Bank Codes."

6. You can perform either of the following optional steps while creating a new item:
 - To check the spelling for the phrase you entered in the Description field, click **Check Spelling**.
 - To associate this item to more than one category, select the **check box** for the applicable categories in the Assorted Categories area.
7. Click **Save**.
8. To create another item, click the **Create New Item** link, and then repeat steps 4 through 7.
9. When you are done creating new items, click **Close** to return to the User Setup Page screen.
10. To view the items you created in the Items grid, click **view items** for the category in which you created the items.

Bank Codes

Use the codes listed in “*Bank Codes*” to create phrases for items. When the item is added to an IEP form, the student's name or the appropriate pronoun is inserted in the position of the code.

Bank Codes

Code	Description	Example
#first#	Inserts student's first name.	#first# will make accurate measurements using appropriate tools and technology. Sandra will make accurate measurements using appropriate tools and technology.
#he/she#	Inserts a lowercase “he” or “she” as appropriate for the student.	When #he/she# is evidencing stress, #first# will initiate appropriate interactions without modeling or prompts. When she is evidencing stress, Sandra will initiate appropriate interactions without modeling or prompts.
#He/She#	Inserts a mixed case “He” or “She” as appropriate for the student.	#He/She# will make accurate measurements using appropriate tools and technology. She will make accurate measurements using appropriate tools and technology.
#him/her#	Inserts a lowercase “him” or “her” as appropriate for the student.	#first# is able to answer direct questions when they are signed and spoken to #him/her# . Sandra is able to answer direct questions when they are signed and spoken to her .
#Him/Her#	Inserts a mixed case “Him” or “Her” as appropriate for the student.	N/A
#his/hers#	Inserts a lowercase “his” or “hers” as appropriate for the student.	#first# will identify which work area is #his/hers# . Sandra will identify which work area is hers .
#His/Hers#	Inserts a mixed case “His” or “Hers” as appropriate for the student.	N/A
#his/her#	Inserts a lowercase “his” or “her” as appropriate for the student.	#first# will alphabetize #his/her# spelling/vocabulary words with 80% accuracy. Sandra will alphabetize her spelling/vocabulary words with 80% accuracy.
#His/Her#	Inserts a mixed case “His” or “Her” as appropriate for the student.	#His/Her# regular classroom teacher will notify the special education teacher of any behavioral issues. Her regular classroom teacher will notify the special education teacher of any behavior issues.

Edit Items in Bank Categories

You can only edit the items in the categories you created. The categories that appear in the shaded cells in the Categories grid are defined by your district; you can view, but not edit, the items in these categories.

1. On the User Bank Setup screen, select the appropriate **bank** from the Choose Bank list.
2. Click the **view items** link in the row for the category in which you want to edit an item.

The Items grid appears below the Categories grid and displays the items associated to category.

Choose Bank:

Category Name	Order	Hide	View Items	Delete
<input type="text" value="Math Goals"/>	<input type="text"/>	<input type="checkbox"/>	view items	<input type="checkbox"/>
<input type="text" value="Reading Goals"/>	<input type="text"/>	<input type="checkbox"/>	view items	<input type="checkbox"/>
Add New Category				

Reading Goals Items

Description	Alias	Edit Item	Delete
#first# will demonstrate comprehension by answering a series o...	Comprehension	edit item	<input type="checkbox"/>
#first# will read at 90 wpm at 3rd grade level readability wit...	Accuracy	edit item	<input type="checkbox"/>
Add New Item			

Items for Category on User Bank Setup Screen

3. Click the **edit item** link in the row of the item you want to edit.
4. On the Item window, you can perform any of the following actions:
 - Modify the information in the Alias and Description fields.
 - Associate the item to additional categories by selecting the **check box** for the appropriate categories in the Associated Categories area.
 - Delete the item by clicking **Delete**.
 - Enter a new item by clicking the **Create New Item** link and then completing the fields on the Item window. See “Add Items to Bank Categories.”
5. Click **Save** to store any changes you made to the current item.
6. If you want to navigate to the other items associated to the selected category, click **Previous** or **Next**, as appropriate.
7. Click **Close** to return to the User Bank Setup screen.


Delete Items from Bank Categories

You can only delete items from the categories you created. The categories that appear in the shaded cells in the Categories grid are defined by your district; you can view, but not delete, the items in these categories.

Note: *Deleting an item does not delete the item from the forms on which it was already imported.*

1. On the User Bank Setup screen, select the appropriate **bank** from the Choose Bank list.
2. Click the **view items** link in the row for the category from which you want to delete an item.

The Items grid appears below the Categories grid and displays the items associated to the category.

3. Click  in the row of the item you want to delete.

A message displays that reads, “Are you sure you want to delete this Item?”

4. Click **OK** to confirm the deletion.

The item no longer displays in the Items grid for the category.

Reports

Report Builder reports are available from the Report screen if they have been enabled for your district and you have the appropriate user privileges. You can select required parameters and numerous optional filters and columns for displaying desired report results. Once you have selected the desired settings, you can save the report with those settings to use in the future.

For information on managing Report Builder reports and users' access to the reports, as well as guidelines for creating custom reports in Microsoft SQL Server Report Builder 2.0 for use in ProgressBook, refer to the *ProgressBook Report Builder Management Guide*.

Report Builder Reports

The following Report Builder reports are available, by default, from the Reports screen to users with the following privileges.

- **Open Tasks** – Displays existing open tasks for one or more task types for students in individual or multiple school(s) or class(es), depending on the report version. This report is available in two versions: one for users whose privileges allow access to school buildings and another version for users whose privileges provide access to classes.
- **Completed Tasks** – Displays existing completed tasks for one or more task types where the date the task was completed falls within the specified date range for students in individual or multiple school(s) or class(es), depending on the report version. This report is available in two versions: one for users whose privileges provide access to school buildings and another version for users whose privileges allow access to classes.
- **Due Date** – Displays completed IEP and/or ETR tasks due for review within the specified date range for students in individual or multiple school(s) or class(es). This report is available in two versions: one for users whose privileges provide access to school buildings and another version for users whose privileges allow access to classes.
- **Accommodations** – Displays statewide testing accommodations listed on the IEP 12 or SP 3 Statewide and District Testing Pages of the completed IEP or SP tasks whose event dates fall within the specified date range for students in individual or multiple school(s) or class(es). This report is available in two versions: one for users whose privileges provide access to school buildings and another version for users whose privileges allow access to classes.
- **Student Demographics** – Displays student demographic information for individual or multiple schools, or multiple classes, class groups or homerooms. This report is available in two versions: one for users whose privileges provide access to school buildings and another version for users whose privileges provide access to classes.
- **EMIS Related Services** – Displays related services information listed on the Services page of the completed IEP or SP tasks whose meeting or start and end dates fall within the specified date range for students in individual or multiple school(s) or class(es), depending on the report version. This report is available in two versions: one to users whose privileges allow access to school buildings and another version to users whose privileges provide access to classes.

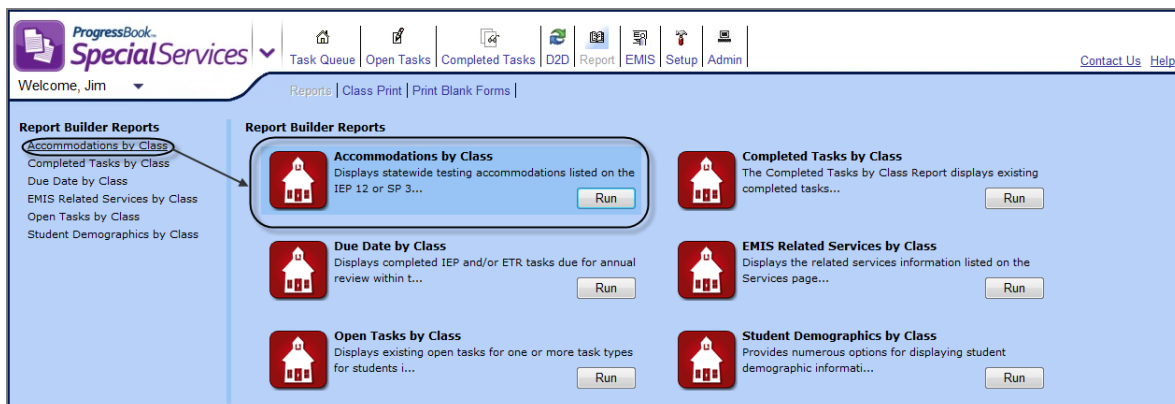
- **EMIS Special Ed Events** – Displays Special Education events information listed on the Special Education Events page of the completed IEP, ETR and SP tasks whose event dates fall within the specified date range for students in individual or multiple school(s) or class(es), depending on the report version. This report is available in two versions: one to users whose privileges allow access to school buildings and another version to users whose privileges provide access to classes.

Specific reports display on the Reports screen based on whether districts have assigned user roles access to those reports. For example, the Accommodations report is available by default to all users whose privileges allow access to school buildings. Even though a guidance counselor may have access to multiple school buildings, if the district does not assign the guidance counselor role access to the Accommodations report, that report does not display on the Reports screen.

Reports Screen

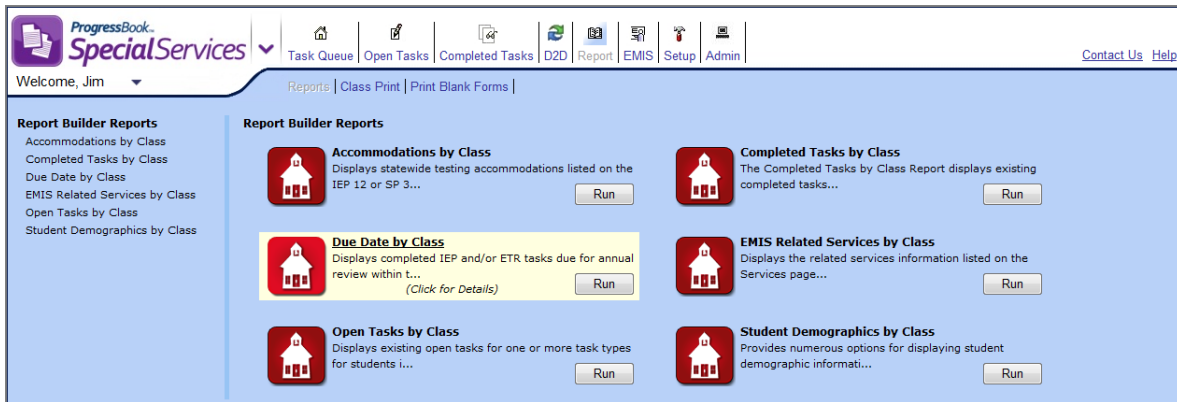
You can run any of the reports available to you on the Reports screen from either the list on the left side of the screen or the main portion of the screen.

When you click the name of the report in the left column, that report is highlighted by a blue rectangle in the main area of the screen. This report remains highlighted until you select a different report or move to another screen.



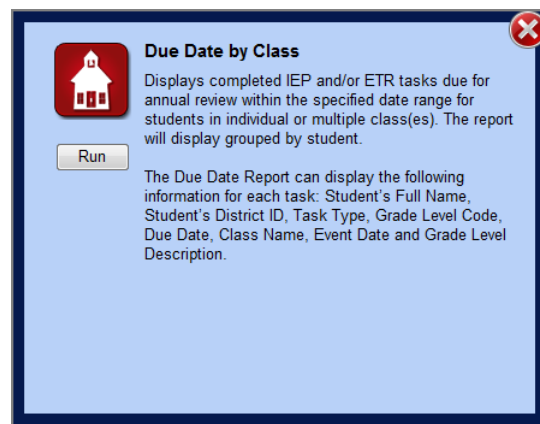
Blue Highlighting of Selected Report

When you hover anywhere over the icon, report name, description or Run button in the main area of the screen, the report is highlighted by a yellow rectangle.

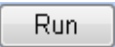


Yellow Highlighting of Hovered Report




When you click anywhere in the yellow highlighted rectangle area, the Report pop-up window opens displaying a description of the report.



Report Pop-up Window

You can generate the report by clicking  on the Report pop-up window or on the main Reports screen.

The appearance of the following icons next to a report indicates the report type.

Icon	Description
 (red)	Core Report – Report provided by ProgressBook SpecialServices.
 (green)	My Report – Version of a report with selection criteria saved by the user.
 (blue)	Add-on Report – Customized report uploaded by district support staff.

Users have the ability to delete any reports they have customized and saved in My Reports. Users cannot delete Core or Add-on reports.

Open Tasks Report

The Open Tasks Report provides numerous options for displaying existing open tasks for one or more task types for students in individual or multiple school(s) or class(es), depending on the report version.

1. On the Report screen, click **Run** under the description of the Open Tasks Report.
The Special Services Report Viewer window displays.
2. Open Tasks Report or Open Tasks by Class Report displays in the Report Header field by default, but you may change the name if desired.
3. In the Select Required Parameters area, if you have access to buildings, select the appropriate **school(s)** in the School(s) list. If you have access to classes, select the appropriate **class(es)** in the Class(es) list.

***Note:** Only school buildings to which you have access or classes and class groups to which you have been assigned display in the list. Hidden classes do not display.*

4. In the Select Required Parameters area, select the appropriate **task type(s)** in the Task Type(s) list.

***Note:** Only tasks enabled for your district display in the list.*

5. In the Set Optional Filters area, select the appropriate **option(s)** in the Field Name list.
 - **Compliance Due Date** – Compliance Due Date of the task selected on the Start a New Task window in SpecialServices.
 - **District Student ID** – Code that identifies the student. If your district is integrated with a student information system, this code may be imported from that system.
 - **Grade Level Code** – Code that represents the grade level in which the student is enrolled. If your district is integrated with a student information system, this code may be imported from that system.
 - **Grade Level Description** – Description of the grade level in which the student is enrolled. If your district is integrated with a student information system, the code may be imported from that system.
 - **Student Name** – Full name of student in the form of last name, first name, middle name. If your district is integrated with a student information system, the name may be imported from that system.
 - **Task Name** – Name of the task selected on the Start a New Task window in SpecialServices.
 - **Task Start Date** – Date the task was created in SpecialServices.
6. Select one of the following **options** in the Operation list if it is available. The available options may vary depending on the option you selected in the Field Name list.
 - Is Equal To
 - Is Not Equal To

- Is Before
- Is Before or On
- Is After
- Is After or On
- Begins With
- Does Not Begin With
- Ends With
- Does Not End With
- Contains
- Does Not Contain
- Has a Value
- Does Not Have a Value

7. Type the appropriate **value** in the Value field.

Note: The available options and acceptable values vary depending on the option you selected in the Field Name list. You may be able to enter only alphabetical or only numeric characters depending on the option you selected in the Field Name list. If you selected an option in the Field Name list that requires a date, a calendar becomes available in the Value field. If you selected Grade Level Code in the Field Name list, for grades 1 through 9 you must enter 0 before the grade in the Value field. If you selected Has a Value or Does Not Have a Value in the Operation list, then the Value field is not available.

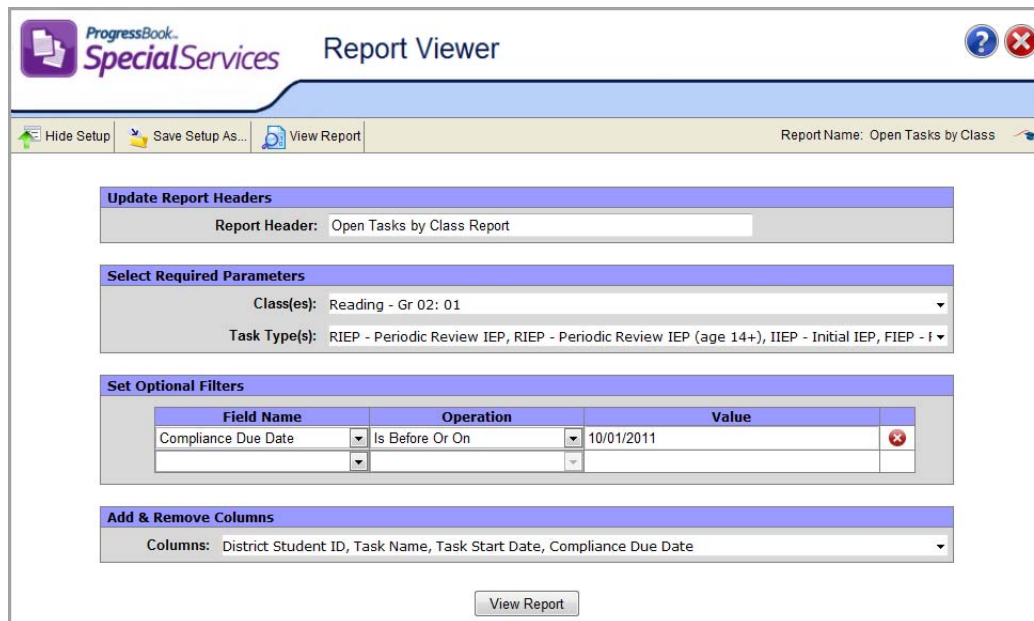
The screenshot shows the 'Report Viewer' window for 'ProgressBook Special Services'. The report name is 'Open Tasks'. The interface includes several sections for configuring the report:

- Update Report Headers:** Report Header: Open Tasks Report
- Select Required Parameters:**
 - School(s): Lake View High School
 - Task Type(s): RIEP - Periodic Review IEP, RIEP - Periodic Review IEP (age 14+), IIEP - Initial IEP, FIEP - I
- Set Optional Filters:** A table with columns for Field Name, Operation, and Value.

Field Name	Operation	Value
Grade Level Code	Is Equal To	09
- Add & Remove Columns:** Columns: District Student ID, Task Name, Task Start Date, Compliance Due Date

A 'View Report' button is located at the bottom of the configuration area.

Open Tasks Report Setup




Open Tasks by Class Report Setup

8. Specific selected columns indicated by a check mark display on the report by default. If you have selected specific filter options in the Field Name list and you want that information to display on the report, make sure to select the corresponding column name in the Columns list.
9. Click **View Report**.

The report displays at the bottom of the window. If multiple events exist for a student, each event displays in a separate row.

Note: The field or list displays red indicating an unacceptable value was entered or a required field was left blank.

10. To save the report with your selected parameters, filters and columns, complete the following steps:

- a. Click  **Save Setup As** on the Save Setup As window.
- b. Type the **unique report name** in the New report name field.
- c. Type the description of the report in the New description field.
- d. Click **Save**.

The following message displays at the bottom of the window, "Report setup saved successfully."

The report displays in the My Reports sections on the Reports screen.

Completed Tasks Report

The Completed Tasks Report provides numerous options for displaying existing completed tasks for one or more task types where the date the task was completed falls within the specified date range for students in individual or multiple school(s) or class(es), depending on the report version.

1. On the Report screen, click **Run** under the description of the Completed Tasks Report. The Special Services Report Viewer window displays.
2. Completed Tasks Report or Completed Tasks Report by Class displays in the Report Header field by default, but you may change the name if desired.
3. In the Select Required Parameters area, if you have access to buildings, select the appropriate **school(s)** in the School(s) list. If you have access to classes, select the appropriate **class(es)** in the Class(es) list.

Note: Only school buildings to which you have access display in the list.

4. In the Select Required Parameters area, select the appropriate **task type(s)** in the Task Type(s) list.

Note: Only tasks enabled for your district display in the list.

5. If you have access to classes, in the Select Required Parameters area, select the appropriate dates in the Start Date and End Date fields. If you have access to school buildings continue with the next step.
6. In the Set Optional Filters area, select the appropriate **option(s)** in the Field Name list.
 - **District Student ID** – Code that identifies the student. If your district is integrated with a student information system, this code may be imported from that system.
 - **Grade Level Code** – Code that represents the grade level in which the student is enrolled. If your district is integrated with a student information system, this code may be imported from that system.
 - **Grade Level Description** – Description of the grade level in which the student is enrolled. If your district is integrated with a student information system, the code may be imported from that system.
 - **Student Name** – Full name of student in the form of last name, first name, middle name. If your district is integrated with a student information system, the name may be imported from that system.
 - **Task Completed Date** – Date the task was completed in SpecialServices.
 - **Task Event Date** – Date entered in the Meeting Date field on an IEP, SP or ETR task Cover Page.
 - **Task Name** – Name of the task selected on the Start a New Task window in SpecialServices.
7. Select one of the following **options** in the Operation list if it is available. The available options may vary depending on the option you selected in the Field Name list.
 - Is Equal To
 - Is Not Equal To
 - Is Before
 - Is Before or On

- Is After
- Is After or On
- Begins With
- Does Not Begin With
- Ends With
- Does Not End With
- Contains
- Does Not Contain
- Has a Value
- Does Not Have a Value

8. Type the appropriate **value** in the Value field.

Note: The available options and acceptable values vary depending on the option you selected in the Field Name list. You may be able to enter only alphabetical or only numeric characters depending on the option you selected in the Field Name list. If you selected an option in the Field Name list that requires a date, a calendar becomes available in the Value field. If you selected Grade Level Code in the Field Name list, for grades 1 through 9, you must enter 0 before the grade in the Value field. If you selected Has a Value or Does Not Have a Value in the Operation list, then the Value field is not available.

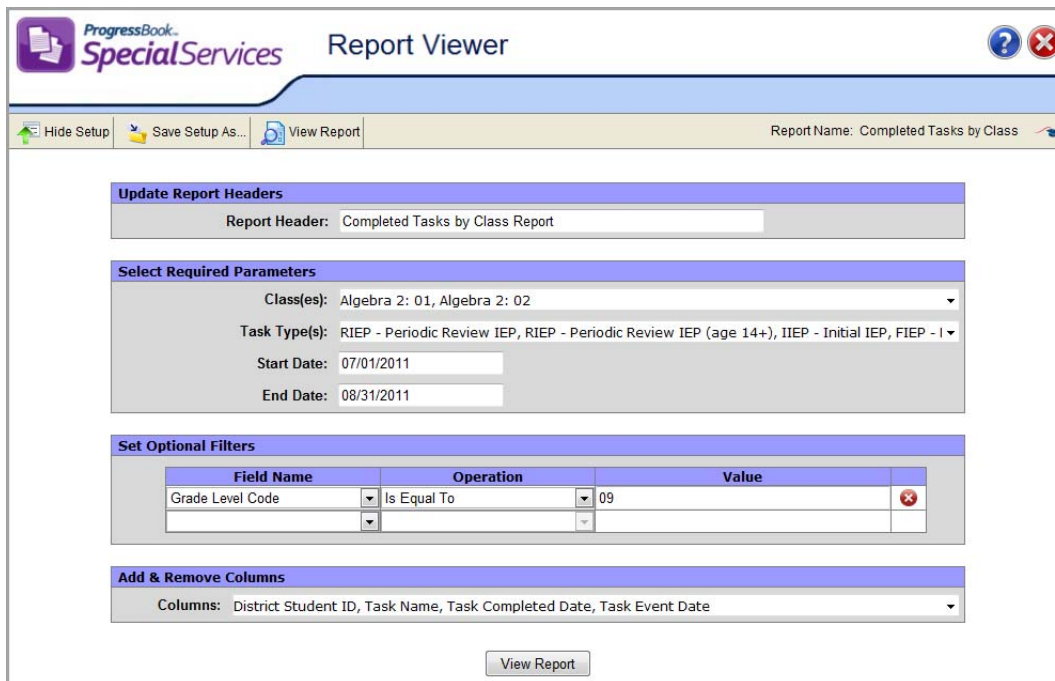
The screenshot shows the 'Report Viewer' interface for 'ProgressBook Special Services'. The report name is 'Completed Tasks'. The interface is divided into several sections:

- Update Report Headers:** Report Header: Completed Tasks Report
- Select Required Parameters:**
 - School(s): Lake View Primary School
 - Task Type(s): RIIEP - Periodic Review IEP, RIIEP - Periodic Review IEP (age 14+), IIIEP - Initial IEP, FIIEP - I
 - Start Date: 06/01/2011
 - End Date: 07/31/2011
- Set Optional Filters:**

Field Name	Operation	Value
Grade Level Code	Is Equal To	02
- Add & Remove Columns:** Columns: District Student ID, Task Name, Task Completed Date, Task Event Date

A 'View Report' button is located at the bottom of the interface.

Completed Tasks Report Setup



Completed Tasks by Class Report Setup


9. Specific selected columns indicated by a check mark display on the report by default. If you have selected specific filter options in the Field Name list and you want that information to display on the report, make sure to select the corresponding column name in the Columns list.

10. Click **View Report**.

The report displays at the bottom of the window. If multiple events exist for a student, each event displays in a separate row.

Note: The field or list displays red indicating an unacceptable value was entered or a required field was left blank.

11. To save the report with your selected parameters, filters and columns, complete the following steps:

- a. Click  **Save Setup As** on the Save Setup As window.
- b. Type the **unique report name** in the New report name field.
- c. Type the description of the report in the New description field.
- d. Click **Save**.

The following message displays at the bottom of the window, “Report setup saved successfully.”

The report displays in the My Reports sections on the Report screen.

Due Date Report

The Due Date Report provides numerous options for displaying completed IEP and/or ETR tasks due for review within the specified date range for students in individual or multiple school(s) or class(es), depending on the report version.

1. On the Report screen, click **Run** under the description of the Due Date Report.

The Special Services Report Viewer window displays.

2. Due Date Report or Due Date by Class Report displays in the Report Header field by default, but you may change the name if desired.
3. In the Select Required Parameters area, if you have access to buildings, select the appropriate **school(s)** in the School(s) list. If you have access to classes, select the appropriate **class(es)** in the Class(es) list.

Note: Only school buildings to which you have access or classes and class groups to which you have been assigned display in the list. Hidden classes do not display in the list.

4. In the Select Required Parameters area, select the appropriate **date(s)** in the Start Date and End Date fields.

Note: You may enter dates in multiple formats using different types of separators, such as 11/01/11, 01.01.2011 or 1-1-11.

5. In the Select Required Parameters area, select one of the following Show ETRs options:

- **Yes** – Include students with any of the following ETR tasks: IETR - Initial Evaluation (School-Age), IETR - Initial Evaluation (Preschool), RETR - Reevaluation (School-Age), RETR - Reevaluation (Preschool) and TETR - Transfer ETR, if they are enabled for your district.
- **No** – Do not include students with ETR tasks.

6. In the Select Required Parameters area, select one of the following Show IEPs options:

- **Yes** – Include students with any of the following IEP tasks: IIEP - Initial IEP, RIEP - Periodic Review IEP, RIEP - Periodic Review IEP (14+) and TIEP - Transfer IEP, if they are enabled for your district.
- **No** – Do not include students with IEP tasks.

7. In the Set Optional Filters area, select the appropriate **option(s)** in the Field Name list.

- **District Student ID** – Code that identifies the student. If your district is integrated with a student information system, this code may be imported from that system.
- **Due Date** – Date by which the task must be complete to be in compliance. The system determines the due date of the IEP by adding one year minus one day to the date entered in the Meeting Date field on the IEP Cover Page. The system determines the due date of the ETR by adding three years minus one day to the date entered in the Meeting Date field on the ETR Cover Page. If the calculated IEP or ETR due date falls within the date range entered in the Start Date and End Date fields entered above, the student displays on the report.
- **Event Date** – Date entered in the Meeting Date field on an IEP, SP or ETR task Cover Page.

- **Grade Level Code** – Code that represents the grade level in which the student is enrolled. If your district is integrated with a student information system, this code may be imported from that system.
 - **Grade Level Description** – Description of the grade level in which the student is enrolled. If your district is integrated with a student information system, the code may be imported from that system.
 - **Student Name** – Full name of student in the form of last name, first name, middle name. If your district is integrated with a student information system, the name may be imported from that system.
 - **Task Type** – Type of the task selected on the Start a New Task window in SpecialServices.
8. Select one of the following **options** in the Operation list if it is available. The available options may vary depending on the option you selected in the Field Name list.
- Is Equal To
 - Is Not Equal To
 - Is Before
 - Is Before or On
 - Is After
 - Is After or On
 - Begins With
 - Does Not Begin With
 - Ends With
 - Does Not End With
 - Contains
 - Does Not Contain
 - Has a Value
 - Does Not Have a Value
9. Type the appropriate **value** in the Value field.

Note: *The available options and acceptable values vary depending on the option you selected in the Field Name list. You may be able to enter only alphabetical or only numeric characters depending on the option you selected in the Field Name list. If you selected an option in the Field Name list that requires a date, a calendar becomes available in the Value field. If you selected Grade Level Code in the Field Name list, for grades 1 through 9 you must enter 0 before the grade in the Value field. If you selected Has a Value or Does Not Have a Value in the Operation list, then the Value field is not available.*

ProgressBook SpecialServices Report Viewer

Report Name: Due Date

Update Report Headers
Report Header: Due Date Report

Select Required Parameters
 School(s): Lake View High School
 Start Date: 09/01/2011
 End Date: 10/31/2011
 Show ETRs: Yes No
 Show IEPs: Yes No

Set Optional Filters

Field Name	Operation	Value
Grade Level Code	Is Equal To	12

Add & Remove Columns
Columns: District Student ID, Task Type, Due Date, Grade Level Code

View Report

Due Date Report Setup

ProgressBook SpecialServices Report Viewer

Report Name: Due Date by Class

Update Report Headers
Report Header: Due Date by Class Report

Select Required Parameters
 Class(es): Algebra 2: 01, Algebra 2: 02
 Start Date: 05/01/2012
 End Date: 06/30/2012
 Show ETRs: Yes No
 Show IEPs: Yes No

Set Optional Filters

Field Name	Operation	Value
Event Date	Is Before Or On	06/30/2012

Add & Remove Columns
Columns: District Student ID, Task Type, Due Date, Grade Level Code

View Report

Due Date by Class Report Setup

- Specific selected columns indicated by a check mark display on the report by default. If you have selected specific filter options in the Field Name list and you want that information to display on the report, make sure to select the corresponding column name in the Columns list.

Note: Only the most recent task displays in the report results, if a student has multiple tasks of one task type and the following information is the same: Student Name, School Name, District Student ID, Task Type, Event Date, Grade Level Code and Grade Level Description. If any of this information is different, then multiple tasks display.


Note: If a student has a TIEP - Transfer IEP or TETR - Transfer ETR, "See IEP" or "See ETR" displays in the Due Date column.

11. Click **View Report**.

The report displays at the bottom of the window. If multiple events exist for a student, each event displays in a separate row.

Note: The field or list displays red indicating an unacceptable value was entered or a required field was left blank.

12. To save the report with your selected parameters, filters and columns, complete the following steps:

- a. Click  **Save Setup As** on the Save Setup As window.
- b. Type the **unique report name** in the New report name field.
- c. Type the description of the report in the New description field.
- d. Click **Save**.

The following message displays at the bottom of the window, "Report setup saved successfully."

The report displays in the My Reports sections on the Report screen.

Accommodations Report

The Accommodations Report provides numerous options for displaying statewide testing accommodations listed on the IEP 12 or SP 3 Statewide and District Testing Pages of the completed IEP or SP tasks whose event dates fall within the specified date range for students in individual or multiple school(s) or class(es), depending on the report version.

1. On the Report screen, click **Run** under the description of the Accommodations Report. The Special Services Report Viewer window displays.
2. Accommodations Report or Accommodations by Class Report displays in the Report Header field by default, but you may change the name if desired.
3. In the Select Required Parameters area, if you have access to buildings, select the appropriate **school(s)** in the School(s) list. If you have access to classes, select the appropriate **class(es)** in the Class(es) list.

Note: Only school buildings to which you have access or classes and class groups to which you have been assigned display in the list. Hidden classes do not display.

4. In the Select Required Parameters area, select one of the following options in the Accommodations list.
 - **Select/Deselect All Accommodations** – Click once to select all the listed Accommodations options. Click again to deselect all the listed Accommodations options.
 - **Yes** – Include subject areas With Accommodations, if any were selected, on the Child Will Be Tested sections on the IEP 12 Statewide and District Testing Page or SP 3 Statewide and District Testing Page.
 - **No** – Include subject areas Without Accommodations, if any were selected, on the Child Will Be Tested sections on the IEP 12 Statewide and District Testing Page or SP 3 Statewide and District Testing Page.
 - **Alt** – Include subject areas with Alternate Assessments, if any were selected, on the Child Will Be Tested sections on the IEP 12 Statewide and District Testing Page or SP 3 Statewide and District Testing Page.
5. In the Select Required Parameters area, select the appropriate **date** in the Start Date and End Date fields.
6. In the Select Required Parameters area, select one of the following Show IEPs options:
 - **Yes** – Include students with the following IEP tasks: IIEP - Initial IEP, RIEP - Periodic Review IEP, RIEP - Periodic Review IEP (14+) and TIEP - Transfer IEP, if they are enabled by your district.
 - **No** – Do not include students with IEP tasks.
7. In the Select Required Parameters area, select one of the following Show SPs options:
 - **Yes** – Include students with SP tasks, if they are enabled by your district.
 - **No** – Do not include students with SP tasks.
8. In the Set Optional Filters area, select the appropriate **option(s)** in the Field Name list.
 - **Area of Assessment** – Subject area, for example, Reading, Writing, Math, Science or Social Studies, selected on the IEP 12 Statewide and District Testing Page or SP 3 Statewide and District Testing Page.
 - **Detail of Accommodations** – Description stated in the Detail of Accommodations section for each area of assessment selected on the IEP 12 Statewide and District Testing Page or SP 3 Statewide and District Testing Page.
 - **District Student ID** – Code that identifies the student. If your district is integrated with a student information system, this code may be imported from that system.
 - **Grade Level When Tested** – Grade level in which the student is or will be enrolled when tested as selected in the Grade column on the IEP 12 Statewide and District Testing Page or SP 3 Statewide and District Testing Page. If your district is integrated with a student information system, this code may be imported from that system.
 - **Student Name** – Full name of student in the form of last name, first name, middle name. If your district is integrated with a student information system, the name may be imported from that system.
 - **Task Completed Date** – Date the task was completed in SpecialServices.
 - **Test Level to be Administered** – Grade level assessment, for example, 10th OGT 3rd achievement, selected in the Assessment Area list on the IEP 12 Statewide and District Testing Page or SP 3 Statewide and District Testing Page.

9. Select one of the following **options** in the Operation list if it is available. The available options may vary depending on the option you selected in the Field Name list.
 - Is Equal To
 - Is Not Equal To
 - Is Before
 - Is Before or On
 - Is After
 - Is After or On
 - Begins With
 - Does Not Begin With
 - Ends With
 - Does Not End With
 - Contains
 - Does Not Contain
 - Has a Value
 - Does Not Have a Value
10. Type the appropriate **value** in the Value field.

Note: *The available options and acceptable values vary depending on the option you selected in the Field Name list. You may be able to enter only alphabetical or only numeric characters depending on the option you selected in the Field Name list. If you selected an option in the Field Name list that requires a date, a calendar becomes available in the Value field. If you selected Grade Level Code in the Field Name list, for grades 1 through 9 you must enter 0 before the grade in the Value field. If you selected Has a Value or Does Not Have a Value in the Operation list, then the Value field is not available.*

ProgressBook Special Services Report Viewer

Report Name: Accommodations

Update Report Headers
Report Header: Accommodations Report

Select Required Parameters
 School(s): Lake View Primary School
 Accommodation(s): Yes, No, Alt
 Start Date: 08/01/2011
 End Date: 08/31/2011
 Show IEPs: Yes No
 Show SPs: Yes No

Set Optional Filters

Field Name	Operation	Value
Test Level to be Administered	Contains	KG

Add & Remove Columns
Columns: District Student ID, Task Type, Test Level to be Administered, Area of Assessment, Accommodations, Det:

View Report

Accommodations Report Setup

ProgressBook Special Services Report Viewer

Report Name: Accommodations by Class

Update Report Headers
Report Header: Accommodations by Class Report

Select Required Parameters
 Class(es): English Gr 11: 01, English Gr 11: 02
 Accommodation(s): Yes
 Start Date: 01/01/2011
 End Date: 03/31/2011
 Show IEPs: Yes No
 Show SPs: Yes No

Set Optional Filters

Field Name	Operation	Value
Area of Assessment	Contains	reading

Add & Remove Columns
Columns: District Student ID, Task Type, Test Level to be Administered, Area of Assessment, Accommodations, Det:

View Report

Accommodations by Class Report Setup

11. Specific selected columns indicated by a check mark display on the report by default. If you have selected specific filter options in the Field Name list and you want that information to display on the report, make sure to select the corresponding column name in the Columns list.


Note: Only accommodations from the most recent task displays in the report results, if a student has multiple tasks of one task type and the following information is the same: District Student ID, Task Type and Meeting Date. If any of this information is different, then accommodations from multiple tasks display.

12. Click **View Report**.

The report displays at the bottom of the window. A separate row displays for each test and subject area combination; therefore, multiple rows may display for a single student.

Note: The field or list displays red indicating an unacceptable value was entered or a required field was left blank.

13. To save the report with your selected parameters, filters and columns, complete the following steps:

- a. Click  **Save Setup As** on the Save Setup As window.
- b. Type the **unique report name** in the New report name field.
- c. Type the description of the report in the New description field.
- d. Click **Save**.

The following message displays at the bottom of the window, "Report setup saved successfully."

The report displays in the My Reports sections on the Report screen.

Student Demographics Report

The Student Demographics report provides numerous options for displaying student demographic information for individual or multiple schools, or individual or multiple classes, class groups or homerooms.

1. On the Report screen, click **Run** under the description of the Student Demographics Report.

The Special Services Report Viewer window displays.

2. Student Demographics Report or Student Demographics by Class Report displays in the Report Header field by default, but you may change the name if desired.
3. In the Set Required Parameters area, if you have access to buildings, select the appropriate **school(s)** in the School(s) list. If you have access to classes, select the appropriate **class(es)** in the Class(es) list.

Note: Only school buildings to which you have access or classes and class groups to which you have been assigned display in the list. Hidden classes do not display.

4. In the Set Optional Filters area, select the appropriate **option(s)** in the Field Name list. See “Available Filters for Student Demographics Report” for descriptions of all the available options.
5. Select one of the following **options** in the Operation list if it is available. The available options may vary depending on the option you selected in the Field Name list.
 - Is Equal To
 - Is Not Equal To
 - Is Before
 - Is Before or On
 - Is After
 - Is After or On
 - Begins With
 - Does Not Begin With
 - Ends With
 - Does Not End With
 - Contains
 - Does Not Contain
 - Has a Value
 - Does Not Have a Value
6. Type the appropriate **value** in the Value field.

Note: The available options and acceptable values vary depending on the option you selected in the Field Name list. You may be able to enter only alphabetical or only numeric characters depending on the option you selected in the Field Name list. If you selected an option in the Field Name list that requires a date, a calendar becomes available in the Value field. If you selected Grade Level Code in the Field Name list, for grades 1 through 9 you must enter 0 before the grade in the Value field.

ProgressBook Special Services Report Viewer

Report Name: Student Demographics

Update Report Headers
Report Header: Student Demographics

Select Required Parameters
Schools: Lake View High School

Set Optional Filters

Field Name	Operation	Value
Enrollment Date	Is After Or On	06/01/2011

Add & Remove Columns
Columns: Student Last Name, Student First Name, Student Middle Name, Student ID, School Name, Birth Date, Grade

View Report

Student Demographics Report Setup

ProgressBook Special Services Report Viewer

Report Name: Student Demographics by Class

Update Report Headers
Report Header: Student Demographics

Select Required Parameters
Class: *Homeroom, Algebra 2: 01, Algebra 2: 02, English Gr 11: 01, English Gr 11: 02, Math - Gr

Set Optional Filters

Field Name	Operation	Value
Disability Code	Contains	10

Add & Remove Columns
Columns: Class Name, Student Last Name, Student First Name, Student Middle Name, Student ID, School Name, Birth Date

View Report


Student Demographics by Class Report Setup

- Specific selected columns indicated by a check mark display on the report by default. If you have selected specific filter options in the Field Name list and you want that information to display on the report, make sure to select the corresponding column name in the Columns list.
- Click **View Report**.

The report displays at the bottom of the window.

Note: The field or list displays red indicating an unacceptable value was entered or a required field was left blank.

9. To save the report with your selected parameters, filters and columns, complete the following steps:

- a. Click  **Save Setup As** on the Save Setup As window.
- b. Type the **unique report name** in the New report name field.
- c. Type the description of the report in the New description field.
- d. Click **Save**.

The following message displays at the bottom of the window, “Report setup saved successfully.”

The report displays in the My Reports sections on the Report screen.

The following table lists available filter options.

Available Filters for Student Demographics Report

Option	Description
Birth Date	Date of birth of the student.
Calendar Name	Calendar used by the school in which the student is enrolled.
Class Name	Name of the class in which the student is enrolled. If no class name is assigned, then course name and section display.
Counselor Name	Name of the guidance counselor assigned to the student.
Disability Code	Code that represents a disability which is included in a list of disabilities recognized by the state department of education. These codes are also used in ProgressBook SpecialServices. If you select this option, you must type 01, 02, 03, 04, 05, 06, 08, 09, 10, 11, 12, 13, 14, 15 or ** in the Value field.
Disability Name	Full name of a disability which is included in a list of disabilities recognized by the state department of education. These codes are also used in ProgressBook SpecialServices. If you select this option, you must type the full or partial disability name in the Value field.
District of Residence	District in which the student resides.
District of Service	District in which the student receives services.
Enrollment Date	Date on which the student enrolled in the school.
Enrollment Status Code	Code that represents whether the student is active or inactive in the school in which the student is enrolled.
Gender Code	Code that represents whether a student is female or male.
Grade Level Code	Code that represents the grade level in which the student is enrolled.
Grade Level Name	Name of the grade level in which the student is enrolled.
Graduation Date	Date on which the student will graduate from high school.
Home School ID	Code that represents the school building in which the student was originally enrolled.
Homeroom ID	Code that identifies the homeroom to which the student is assigned.

Option	Description
Parent Access Disabled Indicator	Indicates whether the student's information has been disabled on the Parent Access Web Site. If a parent account is associated with multiple student accounts, the parent account can still access the other student accounts. If you select this option, you must select Yes or No in the Value field.
Parent Access Disabled Status Name	Indicates whether the student's information has been disabled on the Parent Access Web Site. If you select this option, you must type Disabled in the Value field.
PB School ID	ProgressBook code that identifies the school in which the student is enrolled.
PB Student ID	ProgressBook code that identifies the student.
School Enrollment Status Name	Indicates whether the student's record is active in ProgressBook. If you select this option, you must type Active or Withdrawn in the Value field.
School ID	Code that identifies the school in which the student is enrolled.
School Name	Name of the school in which the student is enrolled.
Student Address Line 1	Street address where the student lives.
Student Address Line 2	Street address where the student lives.
Student Address Line 3	Street address where the student lives.
Student Address Apt No	Apartment number where the student lives.
Student City	City where the student lives.
Student Email Address	Email address of the student.
Student First Name	First name of the student.
Student ID	District code that identifies the student.
Student Last Name	Last name of the student.
Student Middle Name	Middle name of the student.
Student Phone Number	Student's primary phone number.
Student State	State where the student lives.
Student Zip Code	Postal code of the address where the student lives.
Student's Last Parent Access Login Date	Date of the last time the student logged in to the Parent Access Web Site.

EMIS Related Services Report

The EMIS Related Services Report provides numerous options for displaying related services information listed on the Services page of the completed IEP or SP tasks whose meeting or start and end dates fall within the specified date range for students in individual or multiple school(s) or class(es), depending on the report version.

1. On the Report screen, click **Run** under the description of the EMIS Related Services Report.

The Special Services Report Viewer window displays.

2. EMIS Related Services Report or EMIS Related Services by Class Report displays in the Report Header field by default, but you may change the name if desired.

3. In the Select Required Parameters area, if you have access to buildings, select the appropriate **school(s)** in the School(s) list. If you have access to classes, select the appropriate **class(es)** in the Class(es) list.

Note: Only school buildings to which you have access or classes and class groups to which you have been assigned display in the list. Hidden classes do not display in the list.

4. In the Select Required Parameters area, select one of the following Task Included In EMIS options:
 - **Yes** – Include tasks that are marked Include in Emis on the Completed Tasks screen.
 - **No** – Do not include tasks that are marked Include in Emis on the Completed Tasks screen.
5. In the Select Required Parameters area, select one of the following Task Excluded From EMIS options:
 - **Yes** – Include tasks that are not marked Include in Emis on the Completed Tasks screen.
 - **No** – Do not include tasks that are not marked Include in Emis on the Completed Tasks screen.
6. In the Select Required Parameters area, select the appropriate **date(s)** in the Start Date and End Date fields.

Note: You may enter dates in multiple formats using different types of separators, such as 11/01/11, 01.01.2011 or 1-1-11.

7. In the Set Optional Filters area, select the appropriate **option(s)** in the Field Name list.
 - **District Student ID** – Code that identifies the student. If your district is integrated with a student information system, this code may be imported from that system.
 - **Duration** – The amount of time the student receives services.
 - **EMIS ID** – State Student ID code that identifies the student. If your district is integrated with a student information system, this code may be imported from that system.
 - **Frequency** – How often the student receives services.
 - **Goals Addressed** – Goals that the services address.
 - **Location Of Services** – Location where the student receives services.
 - **Provider Title** – Title of the person providing the services.
 - **Service Code** – Code that represents the description of the service the student is receiving entered on the Specially Designed Services page of the task.
 - **Service Description** – Description of the service the student is receiving entered on the Specially Designed Services page of the task.
 - **Service End Date** – Date by which the student should stop receiving services entered on the Services page of the task.
 - **Service Start Date** – Date by which the student should begin receiving services entered on the Services page of the task.

- **Student Name** – Full name of student in the form of last name, first name, middle name. If your district is integrated with a student information system, the name may be imported from that system.
 - **Task Name** – Name of the task selected on the Start a New Task window in SpecialServices.
8. Select one of the following **options** in the Operation list if it is available. The available options may vary depending on the option you selected in the Field Name list.
- Is Equal To
 - Is Not Equal To
 - Is Before
 - Is Before or On
 - Is After
 - Is After or On
 - Begins With
 - Does Not Begin With
 - Ends With
 - Does Not End With
 - Contains
 - Does Not Contain
 - Has a Value
 - Does Not Have a Value
9. Type the appropriate **value** in the Value field.

Note: *The available options and acceptable values vary depending on the option you selected in the Field Name list. You may be able to enter only alphabetical or only numeric characters depending on the option you selected in the Field Name list. If you selected an option in the Field Name list that requires a date, a calendar becomes available in the Value field. If you selected Has a Value or Does Not Have a Value in the Operation list, then the Value field is not available.*

ProgressBook SpecialServices Report Viewer

Report Name: EMIS Related Services

Update Report Headers
Report Header: EMIS Related Services

Select Required Parameters
 School(s): Lake View Primary School
 Task Included In EMIS: Yes No
 Task Excluded From EMIS: Yes No
 Start Date: 10/01/2011
 End Date: 12/01/2011

Set Optional Filters

Field Name	Operation	Value
Service Description	Begins With	a

Add & Remove Columns
Columns: Service Code, Service Description, Service Start Date, Service End Date

View Report

EMIS Related Services Report Setup

ProgressBook SpecialServices Report Viewer

Report Name: EMIS Related Services by Class

Update Report Headers
Report Header: EMIS Related Services by Class

Select Required Parameters
 Class(es): Math - Gr 02: 01
 Task Included In EMIS: Yes No
 Task Excluded From EMIS: Yes No
 Start Date: 12/12/2011
 End Date: 12/19/2011

Set Optional Filters

Field Name	Operation	Value
Service Description	Begins With	a

Add & Remove Columns
Columns: Service Code, Service Description, Service Start Date, Service End Date

EMIS Related Services by Class Report Setup

- Specific selected columns indicated by a check mark display on the report by default. If you have selected specific filter options in the Field Name list and you want that information to display on the report, make sure to select the corresponding column name in the Columns list.


11. Click **View Report**.

The report displays at the bottom of the window. If multiple events exist for a student, each event displays in a separate row.

Note: *The field or list displays red indicating an unacceptable value was entered or a required field was left blank.*

Note: *Only nonhidden students in classes appear in the report.*

12. To save the report with your selected parameters, filters and columns, complete the following steps:

- a. Click  **Save Setup As** on the Save Setup As window.
- b. Type the **unique report name** in the New report name field.
- c. Type the **description** of the report in the New description field.
- d. Click **Save**.

The following message displays at the bottom of the window, "Report setup saved successfully."

The report displays in the My Reports sections on the Report screen.

EMIS Special Ed Events Report

The EMIS Special Ed Events Report displays related services information listed on the Services page of the completed IEP or SP tasks whose meeting or start and end dates fall within the specified date range for students in individual or multiple school(s) or class(es), depending on the report version. This report is available in two versions: one to users whose privileges allow access to school buildings and another version to users whose privileges provide access to classes.

1. On the Report screen under the description of the EMIS Related Services Report, click **Run**.

The Special Services Report Viewer window displays.

2. EMIS Related Services Report or EMIS Related Services by Class Report displays in the Report Header field by default, but you may change the name if desired.
3. In the Select Required Parameters area, if you have access to buildings, select the appropriate **school(s)** in the School(s) list. If you have access to classes, select the appropriate **class(es)** in the Class(es) list.

Note: *Only school buildings to which you have access or classes and class groups to which you have been assigned display in the list. Hidden classes do not display in the list.*

4. In the Select Required Parameters area, select the appropriate **date(s)** in the Start Date and End Date fields.

Note: *You may enter dates in multiple formats using different types of separators, such as 11/01/11, 01.01.2011 or 1-1-11.*

5. In the Select Required Parameters area, select the appropriate task type(s)
6. In the Select Required Parameters area, select one of the following Task Included In EMIS options:
 - **Yes** – Include tasks that are marked Include in Emis on the Completed Tasks screen.
 - **No** – Do not include tasks that are marked Include in Emis on the Completed Tasks screen.
7. In the Select Required Parameters area, select one of the following Task Excluded From EMIS options:
 - **Yes** – Include tasks that are not marked Include in Emis on the Completed Tasks screen.
 - **No** – Do not include tasks that are not marked Include in Emis on the Completed Tasks screen.
8. In the Set Optional Filters area, select the appropriate **option(s)** in the Field Name list.
 - **District Student ID** – Code that identifies the student. If your district is integrated with a student information system, this code may be imported from that system.
 - **EMIS ID** – State Student ID code that identifies the student. If your district is integrated with a student information system, this code may be imported from that system.
 - **Event Date** – Date entered in the Meeting Date field on the task Cover Page.
 - **Event End Date** – Date the event ended.
 - **Event Start Date** – Date the event started.
 - **Event Type** – The type of event.
 - **Non Compliance ID** – The noncompliance identification.
 - **Outcome ID** – The outcome identification.
 - **Required IEP Test Type** – The IEP test type that is required.
 - **Secondary Planning** – The secondary plan.
 - **Student Name** – Full name of student in the form of last name, first name, middle name. If your district is integrated with a student information system, the name may be imported from that system.
 - **Task Name** – Name of the task selected on the Start a New Task window in SpecialServices.
9. Select one of the following **options** in the Operation list if it is available. The available options may vary depending on the option you selected in the Field Name list.
 - Is Equal To
 - Is Not Equal To
 - Is Less Than
 - Is Less Than Or Equal To
 - Is Greater Than
 - Is Greater Than Or Equal To
 - Is Before
 - Is Before or On
 - Is After

- Is After or On
- Begins With
- Does Not Begin With
- Ends With
- Does Not End With
- Contains
- Does Not Contain
- Has a Value
- Does Not Have a Value

10. Type the appropriate **value** in the Value field.

Note: The available options and acceptable values vary depending on the option you selected in the Field Name list. You may be able to enter only alphabetical or only numeric characters depending on the option you selected in the Field Name list. If you selected an option in the Field Name list that requires a date, a calendar becomes available in the Value field. If you selected Has a Value or Does Not Have a Value in the Operation list, then the Value field is not available.

The screenshot shows the 'Report Viewer' interface for 'ProgressBook Special Services'. The report name is 'EMIS Special Ed Events'. The interface is divided into several sections:

- Update Report Headers:** Report Header: EMIS Special Education Events
- Select Required Parameters:**
 - School(s): Hometown High School, Lake View Elementary School, Lake View Intermediate School, La
 - Start Date: 09/01/2011
 - End Date: 01/31/2012
 - Task Type(s): RIEP - Periodic Review IEP, RIEP - Periodic Review IEP (age 14+), IIEP - Initial IEP, FIEP - I
 - Task Included In EMIS: Yes No
 - Task Excluded From EMIS: Yes No
- Set Optional Filters:** A table with columns for Field Name, Operation, and Value.
- Add & Remove Columns:** Columns: Event Type, Event Date, Outcome ID, Non Compliance ID

A 'View Report' button is located at the bottom of the form.

EMIS Special Ed Events Report Setup

ProgressBook Special Services Report Viewer

Report Name: EMIS Special Ed Events by Class

Update Report Headers
 Report Header: EMIS Special Education Events by Class

Select Required Parameters
 Class(es): Algebra 2: 02, English Gr 11: 01, English Gr 11: 02, Math - Gr 02: 01, Reading - Gr 02: 01
 Start Date: 09/01/2011
 End Date: 01/31/2012
 Task Type(s): RIEP - Periodic Review IEP, RIEP - Periodic Review IEP (age 14+), IIEP - Initial IEP, FIEP - f
 Task Included In EMIS: Yes No
 Task Excluded From EMIS: Yes No

Set Optional Filters

Field Name	Operation	Value
Task Name	Is Equal To	

Add & Remove Columns
 Columns: Event Type, Event Date, Outcome ID, Non Compliance ID

View Report

EMIS Special Ed Events by Class Report Setup


11. Specific selected columns indicated by a check mark display on the report by default. If you have selected specific filter options in the Field Name list and you want that information to display on the report, make sure to select the corresponding column name in the Columns list.

12. Click **View Report**.

The report displays at the bottom of the window. If multiple events exist for a student, each event displays in a separate row.

Note: The field or list displays red indicating an unacceptable value was entered or a required field was left blank.

13. To save the report with your selected parameters, filters and columns, complete the following steps:

- a. Click  **Save Setup As** on the Save Setup As window.
- b. Type the **unique report name** in the New report name field.
- c. Type the **description** of the report in the New description field.
- d. Click **Save**.











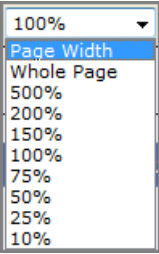
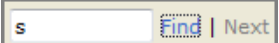
The following message displays at the bottom of the window, "Report setup saved successfully."

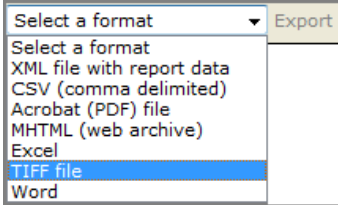




The report displays in the My Reports sections on the Report screen.

Report Builder Reports Available Features

On the Special Services Report Viewer window, once you have selected required parameters and optional filters to create customized reports, you can save the report with those settings to use in the future. Once you have generated the report, numerous features are available as shown in the following table.

Features for Report Builder Reports

Feature	Description
	Click this icon to view the report.
	Click this icon to view the report.
	Click this icon to show report headers, required parameters, optional filters and columns.
	Click this icon to hide report headers, required parameters, optional filters and columns.
	Click this icon to save the report with the selected parameters, filters and columns, type the unique report name in the New report name field and click Save.
	Click this icon to navigate to the next page in the report.
	Click this icon to navigate to the last page in the report.
	Click this icon to navigate to the previous page.
	Click this icon to navigate to the first page.
	Type the page number in the field and then press Enter.
	Select the desired percentage in the list that represents the display size. This feature is only available when using Internet Explorer.
	Type the word or phrase in the blank field next to Find and click Find. Click Next to search for next instance of the word or phrase. This feature is only available when using Internet Explorer.


Feature	Description
	<p>Select the desired format in the list and click Export. When prompted, click either Open or Save. If you select Open, the report opens in the software application associated with the file format you selected. You must have the appropriate application installed on your computer to read and modify the report file. The following file formats are available:</p> <ul style="list-style-type: none"> • XML File with report data - Extensible Markup Language file format viewed in a Web browser with only data; there is no page formatting, headers, footers, lines or graphic images. • CSV - Comma-separated values file format in plain text format. • Acrobat (PDF) file - Portable document file format than can be viewed in Adobe Reader but not edited. • MHTML (Web archive) - Short for MIME HTML file format and also referred to as MHT. This is a Web page archive format used to bind images, Flash animations, Java applets, audio files, etc., together with HTML code into a single file. This file format can be viewed in a Web browser and is supported in the following browser versions: Internet Explorer 5.5 and later, Firefox 1.5 and later and Safari 3.0 and later. • Excel - Format provides full functionality of Microsoft Excel. • TIFF - Large graphic file format that may take longer to open than other file types and cannot be edited. • Word - Format provides full functionality of Microsoft Word.
	<p>Click this icon to print the report. If prompted to install SQL Server Reporting Services 2008 ActiveX control, continue to install it on the computer, so you can print the report. The print feature is only available when using Internet Explorer. If you are not able to install the ActiveX control, proceed to export the report to an acceptable file format and then print the report from that software application.</p>
	<p>Click this icon to sort the columns in ascending or descending order.</p>
	<p>Click this icon to close the Special Services Report Viewer window.</p>
	<p>Click this icon to view Help for Report Builder reports.</p>

Progress Reports

You can print progress reports for one or more students in a class on the Class Print screen. The progress reports for the students you selected are merged into a single PDF document, which you can send to print on a local printer.

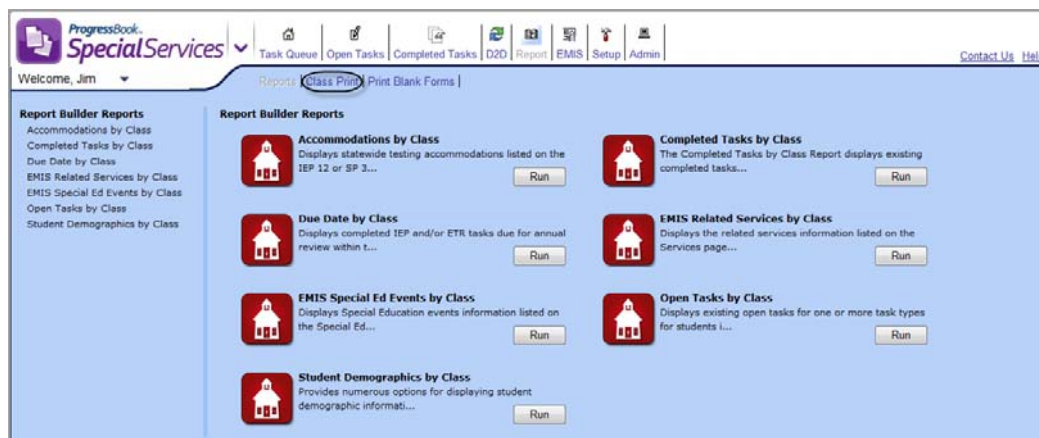
Note: To print progress reports, you must be assigned to at least one class.

Print Progress Reports

1. On the banner, click **Report** .

The Report screen displays with additional menu options beneath the banner.

2. Click the **Class Print** link.

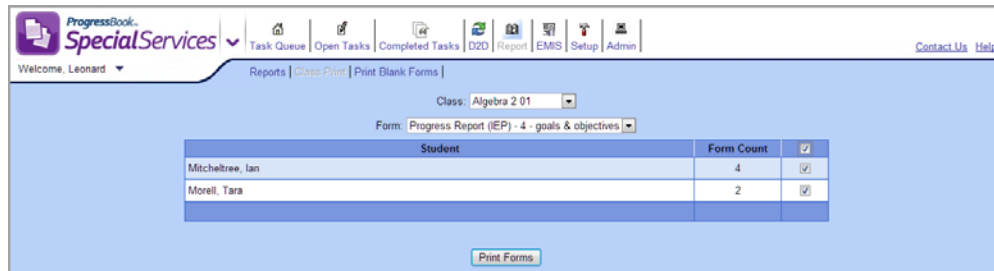


Class Print Link on Report Screen

The Class Print screen displays with Progress Report (IEP) selected in the Form list by default.

3. Select the **class** for which you want to print progress reports in the Class list.
4. Select the **type of progress report** you want to print in the Form list.

The students in the selected class who have an open progress report task of the selected type display. The Form Count field displays the number of pages contained in the student's progress report.



Class Print Screen

5. Perform one of the following actions to select the students whose progress reports you want to print:
 - To select individual students, select the **check box** in the row of the desired student.
 - To select *all* of the students, select the **check box** on the column heading at the top of the grid.
6. Click **Print Forms**.

The progress reports for the selected students are merged into a single document and display in a new window.

IEP Individualized Education Program PROGRESS REPORT		Woodland Hills School District Nadja DiMino
PARENT: This form is used to report on your child's progress on the goals and objectives listed on his/her IEP. Should you have any questions, please do not hesitate to contact your child's special education teacher.		
CHILD'S INFORMATION		
NAME: <u>Nadja DiMino</u>		ID NUMBER: <u>999834286</u>
GOAL NUMBER: <u>1</u>		GRADE LEVEL: <u>02</u> / <u>02</u>
AREA: <u>Math</u>		IEP EFFECTIVE DATES: <u>02/27/2012</u> - <u>02/27/2013</u>
SCHOOL BUILDING: <u>Lake View Elementary School</u>		HOMEROOM TEACHER: <u>Ms. Jones</u>
SPECIAL ED TEACHER: <u>Mr. Hall</u>		RELATED SERVICE PROVIDERS: <u>J. Neighbors, E. Smith, D. West</u>
MEASURABLE ANNUAL GOAL		STUDENT PROGRESS
Nadja will learn her addition and subtraction flash cards with 80% accuracy.		

Selected Student Progress Reports

Note: SpecialServices uses Adobe Live Cycle Web Service to facilitate printing forms. If you try to view or print the EMIS Data Collection Form and the Live Cycle Web Service does not respond, the following message displays, "Form Printing, Task Completion, Viewing EMIS DCF is currently unavailable. Please try again soon. If problems persist please contact support."

7. To print, click on the toolbar.
8. Close the window displaying the merged forms to return to the Class Print screen.

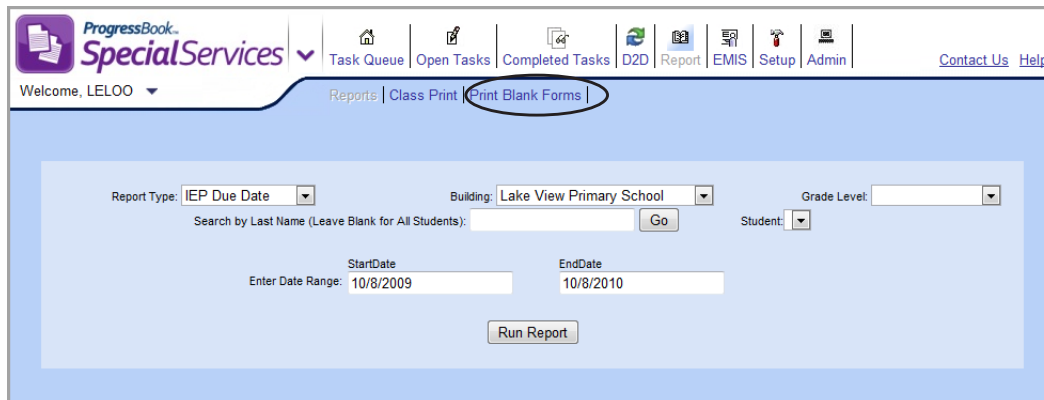
Blank Forms

You can print blank versions of several SpecialServices forms from the Print Blank Forms screen to use offline. For example, you might print a blank set of the ETR forms to fill out during an ETR team meeting. The forms available for printing are merged into a single PDF document, which you can send to print on a local printer.

Print Blank Forms

1. On the banner, click **Reports** .

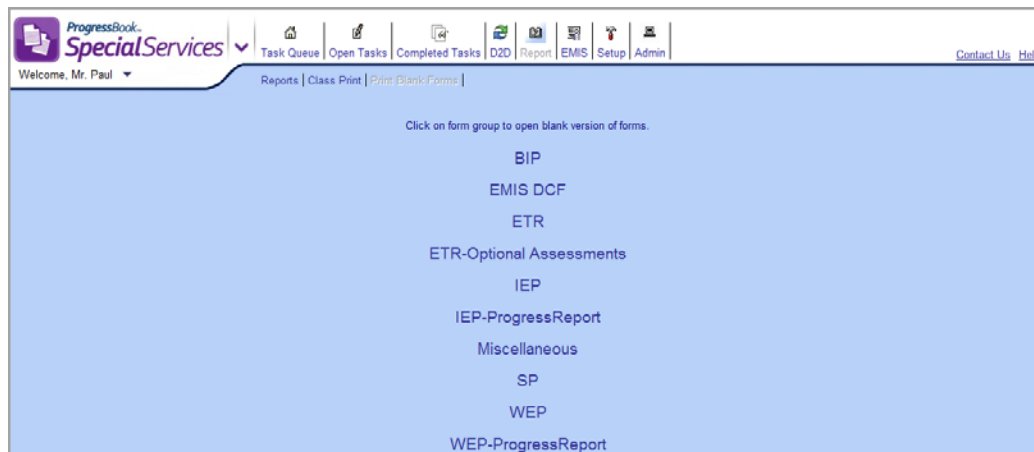
The Report screen displays with additional menu options under the banner.



Print Blank Forms Link on Report Screen

2. Click the **Print Blank Forms** link.

The Print Blank Forms screen displays the group names for the forms you can print.



Print Blank Forms Screen

3. Click the **form group** for the forms you want to print. The following table lists all the forms included in each form group.

- BIP
- EMIS DCF
- ETR
- ETR-Optional Assessments
- IEP
- IEP-Progress Report
- Miscellaneous
- SP
- WEP
- WEP-Progress Report

Forms Available in Form Group

Form Group	Forms
EMIS DCF	EMIS Data Collection Form
ETR	<ul style="list-style-type: none"> • ETR Cover Page • ETR 1 Individual Assessment • ETR 2 Team Summary • ETR 3 Specific Learning Disability • ETR 4 Eligibility • ETR 5 Signatures • ETR Evaluation Plan Preschool • ETR Evaluation Plan School-Age • Agreement to Waive Reevaluation • ETR Attachment Page • Referral for Evaluation • Parent Consent for Evaluation
ETR-Optional Assessments	<ul style="list-style-type: none"> • ETR Background Information • ETR Communication Skills • ETR Fine Motor Skills • ETR Gross Motor Skills • ETR Hearing • ETR Observation • ETR Social Emotional Status • ETR Vision

Form Group	Forms
IEP	<ul style="list-style-type: none"> • IEP Cover Page • IEP 1 Future Planning, 2 Special Factors, 3 Profile • IEP 4 PostSecondary Transition • IEP 5 PostSecondary Transition Services • IEP 6 Measurable Annual Goals • IEP 7 Specially Designed Services, 8 Transportation as Service • IEP 9 NonAcademic, 10 General Factors, 11 LRE • IEP 12 Statewide and District Testing • IEP 13 Meeting Participants • IEP 14 Signatures • IEP 15 Visual Impairments • IEP Attachment Page • Parent/Guardian Excusal of an IEP Team Member • Summary of Performance
IEP-Progress Reports	<ul style="list-style-type: none"> • Progress Report (IEP Form) • Progress Report (IEP) - 4 Columns, Goals & Objectives, Single comment • Progress Report (IEP) - 4 Columns, Goals only, Single comment • Progress Report (IEP) - 4 Columns, Goals only, 4 comments • PR (IEP) 4 Progress Goals & Obj • Progress Report (IEP) - 6 Columns, Goals & Objectives, Single comment • Progress Report (IEP) - 6 Columns, Goals only, Single comment • Progress Report (IEP) - 6 Columns, Goals only, 6 comments • PR (IEP) 6 Progress Goals & Obj • Progress Report (IEP) - 8 Columns, Goals & Objectives, Single comment • Progress Report (IEP) - 8 Columns, Goals only, Single comment • Progress Report (IEP) - 8 Columns, Goals only, 8 comments • PR (IEP) 8 Progress Goals & Obj
Miscellaneous	<ul style="list-style-type: none"> • Special Education Events Form • Documentation of Attempts • Prior Written Notice • Parent Invitation • General Invitation • Manifestation Determination Review • Manifestation Determination Worksheet • Due Process • Request for Assignment of a Surrogate Parent
SP	<ul style="list-style-type: none"> • Service Plan Cover Page • SP 1 Measurable Annual Goals • SP 2 Specially Designed Services • SP 3 Statewide and District Testing • SP 4 Meeting Participants • SP 5 Signatures
WEP	<ul style="list-style-type: none"> • WEP Cover Page • WEP Measurable Annual Goals • WEP Signatures

Form Group	Forms
WEP-Progress Report	<ul style="list-style-type: none"> • Progress Report (WEP)
BIP	<ul style="list-style-type: none"> • BIP Cover Page • Functional Behavior Assessment • Documentation of Interventions • BIP Outcomes Worksheet • BIP Goal Page • BIP Signature Page • BIP Crisis Intervention Plan


The forms in the form group you selected display in single PDF document on the Page Display screen.

The screenshot shows a web browser window displaying the 'ETR Evaluation Team Report' form. The browser's address bar shows 'ProgressBook Special Services' and the user is logged in as 'Ms. Sue'. The form is presented in a single PDF document view. The form sections are as follows:


- CHILD'S INFORMATION:** Fields for NAME, ID NUMBER, GRADE, DATE OF BIRTH, GENDER, STREET, CITY, STATE, ZIP, DISTRICT OF RESIDENCE, and DISTRICT OF SERVICE.
- MEETING INFORMATION:** MEETING TYPE with checkboxes for INITIAL EVALUATION and REEVALUATION.
- DATES:** Fields for MEETING DATE, LAST ETR DATE, REFERRAL DATE, PARENTS' CONSENT RECEIVED DATE.
- PARENTS'/GUARDIAN'S INFORMATION:** Field for NAME.
- ETR FORM STATUS (check when complete):** A checkbox for PART 1: INDIVIDUAL EVALUATOR'S.

Selected Form Group on Page Display Screen

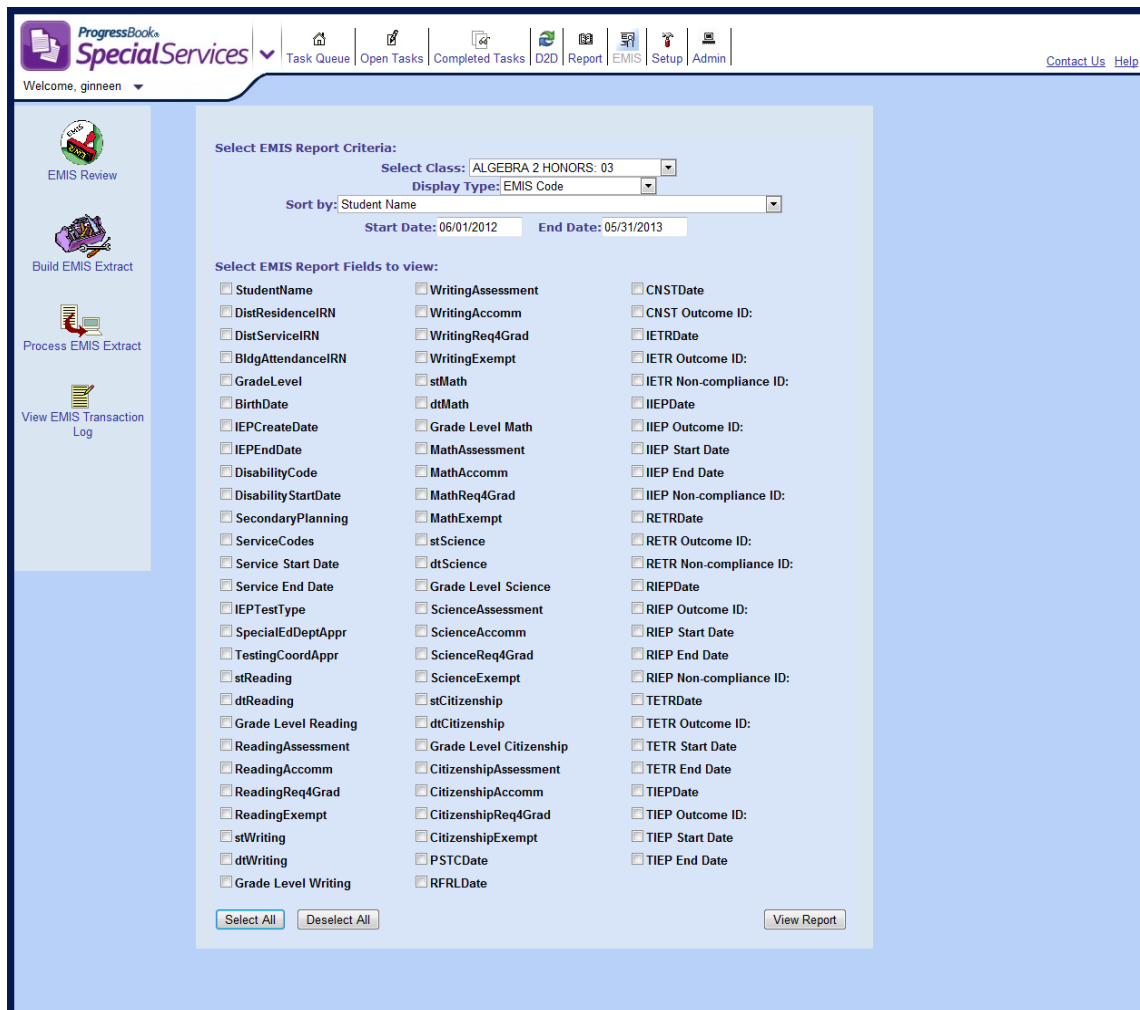
Note: SpecialServices uses Adobe Live Cycle Web Service to facilitate printing forms. If you try to Print Blank Forms and the Live Cycle Web Service does not respond, the following message displays, "Form Printing, Task Completion, Viewing EMIS DCF is currently unavailable. Please try again soon. If problems persist please contact support."

- To print the forms, click  on the Adobe Acrobat toolbar.
- On the Print window, ensure the appropriate printer is selected, and then click **Print**.
- Click **Close** to return to the Print Blank Pages screen.

EMIS

The EMIS Review Report enables you to view and print the EMIS Data Collection Form for one or more students once the associated task is completed. You can run the EMIS Review Report from the EMIS Tools screen by clicking the EMIS  button on the banner.

Note: Users with the appropriate security privileges can also access the following EMIS Tools: Build EMIS Extract, Process EMIS Extract and View EMIS Transmission Log. For more information about the EMIS Tools, see the SpecialServices System Manager Guide.



The screenshot displays the 'EMIS Review' interface within the 'SpecialServices' application. The top navigation bar includes 'Task Queue', 'Open Tasks', 'Completed Tasks', 'D2D', 'Report', 'EMIS', 'Setup', and 'Admin'. The user is logged in as 'ginneen'. The main content area is titled 'Select EMIS Report Criteria:' and features a dropdown menu for 'Select Class' (currently set to 'ALGEBRA 2 HONORS: 03') and a 'Display Type' dropdown (set to 'EMIS Code'). Below these are 'Sort by:' (set to 'Student Name') and date range fields for 'Start Date' (06/01/2012) and 'End Date' (05/31/2013). A section titled 'Select EMIS Report Fields to view:' contains a grid of checkboxes for various data fields, such as 'StudentName', 'WritingAssessment', 'CNSTDate', and 'ReadingAssessment'. At the bottom of this section are 'Select All', 'Deselect All', and 'View Report' buttons. A left-hand sidebar contains icons for 'EMIS Review', 'Build EMIS Extract', 'Process EMIS Extract', and 'View EMIS Transaction Log'.

EMIS Review Report Options on EMIS Selection Form Screen

How Tasks Are Selected by Date Range in EMIS

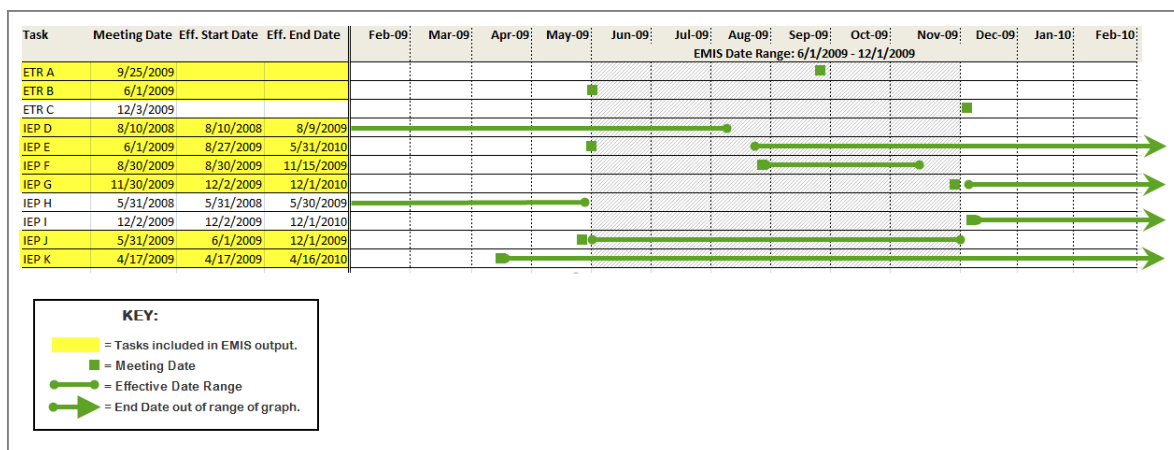
The date range entered in the Start Date and End Date fields on the EMIS Review Report screens selects tasks based on the following event dates:

- **Meeting Date** – The value entered in the Meeting Date field on the cover page of an ETR, IEP or SP task. For tasks to appear on the EMIS Review Report, the meeting date of the task must fall within the entered date range, including the first and last date in the range.
- **Effective Dates** – The values entered in the Effective Start and End fields on the cover page of an IEP or SP Task. For tasks to appear on the EMIS Review Report, the effective dates of the task must fall within the entered date range, but can start or end before, after, or during the range.

For example, if the date range entered for the EMIS Review Report is 06/01/2009 - 12/01/2009, tasks with the following meeting or effective dates would appear on the report:

- Any ETR, IEP or SP task with a meeting date of 06/01/2009 through, and including, 12/01/2009.
- Any IEP or SP task with an effective start date before 06/01/2009 and an effective end date before 12/01/2009, such as 08/10/2008 - 08/09/2009.
- Any IEP or SP task with an effective start date after 06/01/2009 and effective end date after 12/01/2009, such as 08/27/2009 - 05/31/2010.
- Any IEP or SP task with an effective start date after 06/01/2009 and effective end date before 12/01/2009, such as 08/30/2009 - 11/15/2009.
- Any IEP or SP task with an effective start date before 06/01/2009 and effective end date after 12/01/2009, such as 04/17/2009 - 04/16/2010.

“Tasks Included on EMIS Review Report by Date Range” shows example scenarios where tasks are included in or excluded from the EMIS Review Report or EMIS Extract when run by a date range of 06/01/2009 - 12/01/2009.



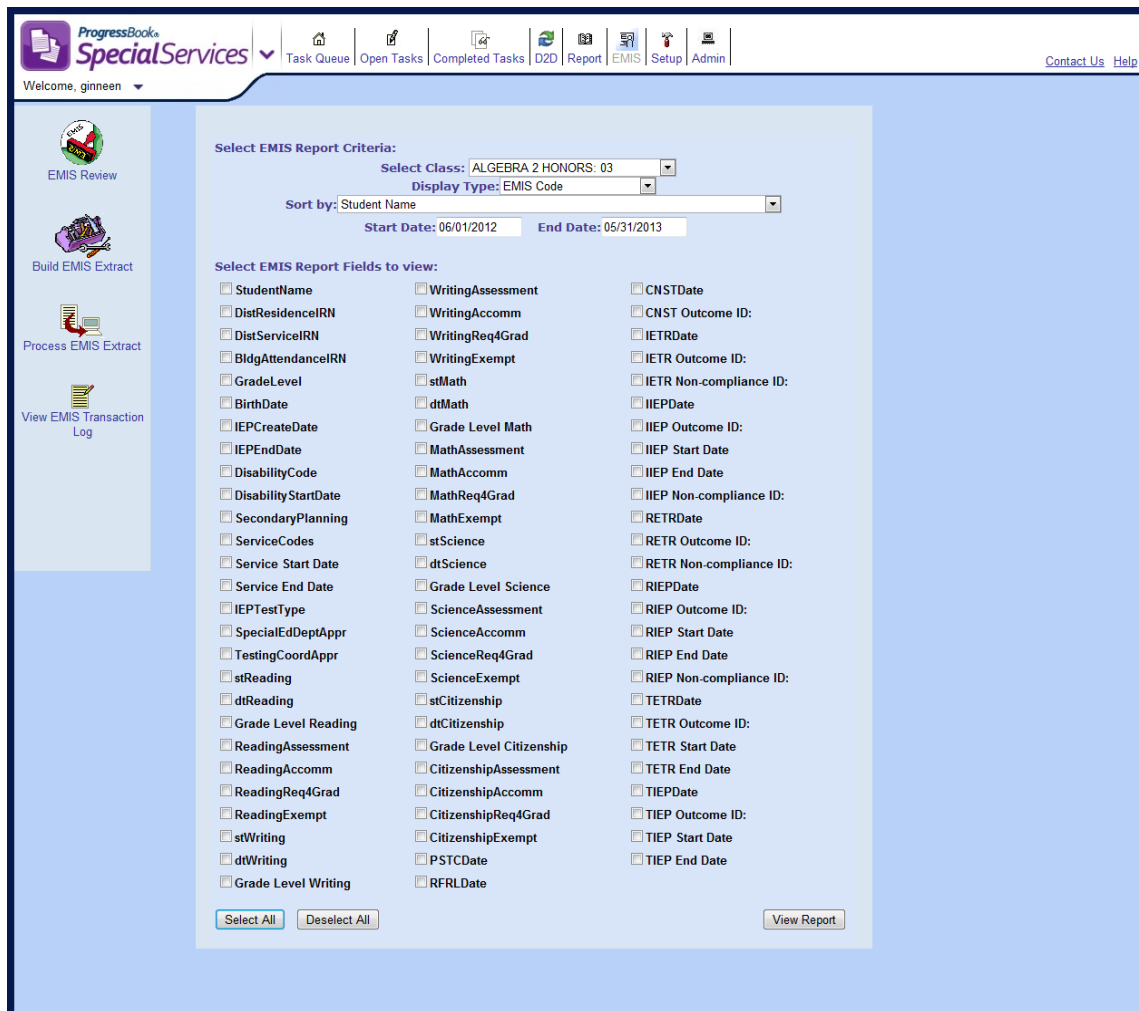
Tasks Included on EMIS Review Report by Date Range

View the EMIS Data Collection Form for Completed Tasks

The EMIS Review Report lists all of the students whose information is available for reporting to EMIS within a specified date range and enables you to access the EMIS Data Collection Form after the task has been completed. You can select the information you want to display about the student on the report.

1. Click **EMIS**  on the banner.

The EMIS Selection Form screen displays with the options for the EMIS Review Report.



EMIS Selection Form Screen

2. In the Select EMIS Report Criteria section of the EMIS Selection Form, select the **building** or **class** for which you want to run the EMIS Review Report.

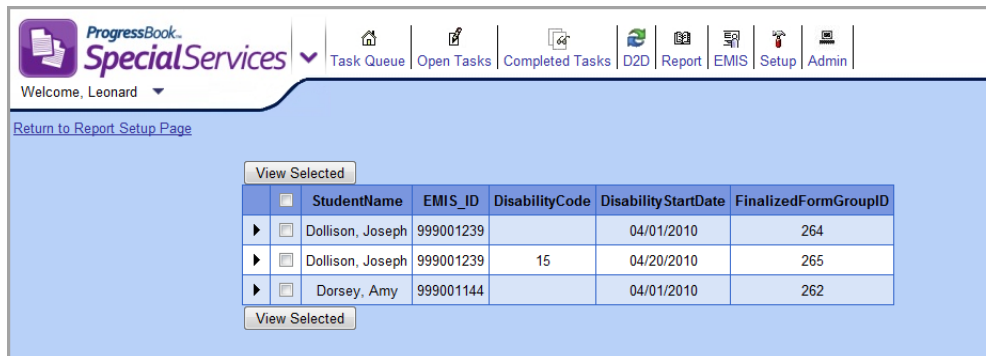
Note: Depending on your level of access, either the Building or Class list displays on the EMIS Selection Form screen.

3. Select the **field** by which you want the system to sort the information on the report in the Sort by list.
4. Enter the **start and end date range within which you want to view the applicable tasks** in the Start Date and End Date fields. See *“How Tasks Are Selected by Date Range in EMIS.”* The default date range is the current EMIS event year; for example, 06/01/2012 for the start date and 05/31/2013 for the end date.
5. In the Select EMIS Report Fields to view section, select the **check box** next to the fields you want to display on the EMIS Review Report.

Note: To quickly display the report, it is recommended to select Student Name, IEP Create Date and IEP End Date.

6. Click **View Report**.

The EMIS Review Report displays all of the students whose information falls within the selected criteria.



<input type="checkbox"/>	StudentName	EMIS_ID	DisabilityCode	DisabilityStartDate	FinalizedFormGroupID
<input type="checkbox"/>	Dollison, Joseph	999001239		04/01/2010	264
<input type="checkbox"/>	Dollison, Joseph	999001239	15	04/20/2010	265
<input type="checkbox"/>	Dorsey, Amy	999001144		04/01/2010	262

EMIS Review Report

7. Select the **check box** next the name of each student whose EMIS Data Collection Form you want to view, and then click **View Selected**.

The EMIS Data Collection Form for the student you selected displays in a new window. If you selected multiple students, all of the forms are merged into a single file.

EMIS Data Collection Form for Students with Disabilities Woodland Hills School District
Nora Iannuzzi

CHILD'S INFORMATION


NAME: Nora Iannuzzi DISTRICT OF RESIDENCE: _____
 ID NUMBER: 999900484 GRADE: 09 /09 DISTRICT OF SERVICE: _____
 DATE OF BIRTH: 8/31/2002 GENDER: F DISABILITY CATEGORY: ** Not Applicable
 BUILDING OF ATTENDANCE: Hometown High School DISABILITY START DATE (if changed): _____

SPECIAL EDUCATION EVENTS

CODE	EVENT DATE	OUTCOME ID	START DATE	END DATE	NON-COMPLIANCE ID
PSTC		---	---	---	---
RFRL		---	---	---	---
CNST			---	---	---
IETR			---	---	
IIEP					
RETR			---	---	
RIEP					
TETR					---
TIEP					---
FIEP		---	---	---	
CIEP		---	---	---	

EMIS Data Collection Form

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8. To print, click  on the toolbar.
9. Click **Close** to return to the EMIS Review Report.

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