

IEP Online User Guide

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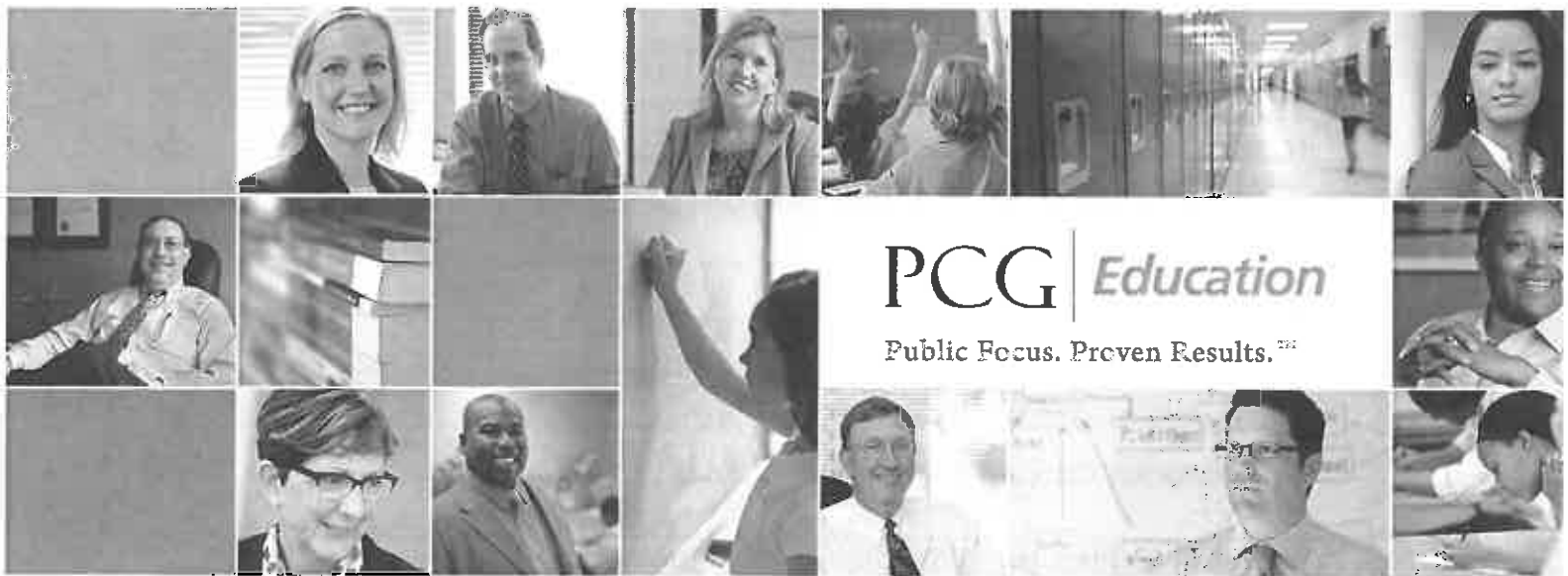


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Trademarks

Trademarked names may appear throughout this document. Rather than list the names and entities that own the trademarks or insert a trademark symbol with each mention of the trademarked name, the names are used only for editorial purposes and to the benefit of the trademark owner with no intention of infringing upon that trademark.

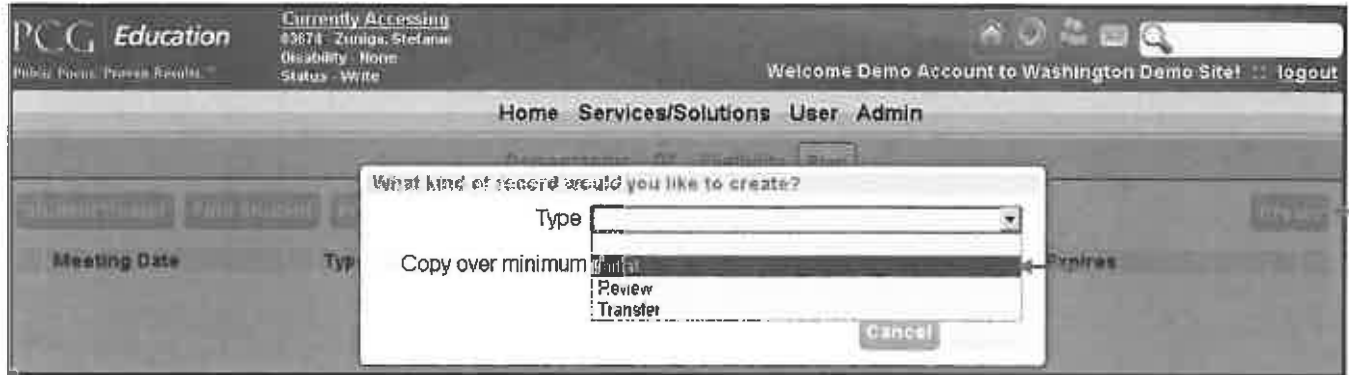
All student information is fictional. Any resemblance to persons, living or dead is purely coincidental.

Disclaimer: All content in this document is for the purpose of informing IEP Online users of features already developed for other projects. PCG cannot be held responsible for any changes made by districts to this document. Districts are encouraged to insert their policy and procedures to compliment the available documentation.

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Initial IEP

Creating an Initial IEP



- The furthest right tab at the top of the screen is the *plan* tab. Clicking on the tab opens the *plan* main screen, which contains a historical list of IEP's of record for the selected student. Each line corresponds to a different meeting/IEP type.
- The meeting date, type of IEP meeting, and the IEP start, end, and review dates are displayed in the list.
- Click on *create*, at the top right corner to access the IEP record list.
- Select Initial from the type drop-down list, as shown above in the middle of the screen.
- If there is a current Initial Eligibility or Reevaluation that is unlocked, you can complete a Draft Initial IEP. The word Draft will disappear once the Eligibility record is locked.
- The Initial IEP will appear in the list on the *plan* main screen. Click on the Initial IEP to begin entering data.

IEP/Notification

The screenshot displays the PCG Education web application interface for IEP/Notification. At the top, there is a header with the PCG Education logo and user information: 'Currently Accessing: 61674 - Zampa, Stefan', 'Disability: None', and 'Status: 0%'. A navigation bar includes 'Home Services/Solutions User Admin' and a breadcrumb trail: 'Demographics > Eligibility > Plan:'. The left sidebar contains a menu with the following items: Notification (selected), Meeting Info, Parental Contact, Meeting Participants, Bank Of Participants, Bank Of Users, Planning, Performance, Transition, Goals, Services, LIE, Assessments, Testing, Prior Notice, and Progress. The main content area is titled 'Meeting Info' and contains the following fields: Meeting Date, Location, Interpreter Needed (dropdown), and Time. Below these is a 'Contact' section with fields for Name (Demo), Account, Title, Phone, Fax, and Email (daccount@pcgus.com). At the bottom is a 'Purpose' section with five radio button options: Develop an Initial IEP, Review Current IEP, Discuss Transition Services, Discuss Graduation, and Discuss Annual Goal Progress.

- The *notification* tab, which is listed first in the left side of the screen, enables you to enter data pertaining to notification of the IEP meeting.
- To get started, click on *Meeting Info* on the left of the screen.

IEP/Notification/Meeting Info

- Throughout the IEP you will see yellow fields. They are required to be filled out before a record is considered complete. Additionally red circles will appear next to certain left tabs – these indicate the tabs that contain required fields. The color of the circle updates based on the amount of required fields filled in.
 - Red = Very few – no required fields completed
 - Yellow = Most required fields completed
 - Green = All required fields completed
- On the right of the screen, enter in the *Date* of the meeting. All dates need to be entered in the following format MM/DD/YYYY. You may also click on the calendar icon in the top right of the date box to use the popup calendar.
- Specify if an interpreter is needed, and then type in the time and location of the IEP meeting.
- When entering the time, always use a consistent protocol of HH:MM and then AM or PM, [e.g. 9:00 am or 3:30 pm.] If a date or time is entered incorrectly the box will highlight in red indicating wrong format.
- The Contact information pulls from the user’s profile screen. Whoever creates the record, his/her data will pre-populate there. If some information is missing on the *Contact* section, click

on *student roster*, then the *user* tab on the left to make changes to your contact information. Next time you create a record the information will populate for you.

- Lastly, the *Purpose* of the Initial IEP Meeting must be selected. If you select *Other*, you will need to specify what the other purpose of the meeting is in the field labeled *Other*.
- **Note:** more of the screen can be seen by **scrolling** up or down

IEP/Notification/Parental Contact Attempt

The screenshot shows the 'Contact Attempt' form within the PCG Education web application. The form is titled 'Contact Attempt' and contains the following sections:

- Method:** A dropdown menu.
- Date:** A text input field.
- Parents:** A list of radio buttons for selection: Alfredo Rice, Gregg Carey, Student, and Other.
- Surrogate:** A list of radio buttons for selection.
- Other:** A text input field.
- Response:** A section with a Date field and a Response dropdown menu.
- Alternate Attendance:** A section with radio buttons for 'Individual or Conference Telephone Call' and 'Video Conferencing'.

- To enter the parental contact attempts for the meeting, click on *Parental Contact* and then click on the green *add contact attempt* as shown by the arrows above.
- The *Contact Attempt* screen will appear, after clicking on *add contact attempt*.
- In the *Method* drop down select either, Letter, Phone, Email, Conference, In Person, or Other and then enter the *Date* you are sending the attempt. If you select Other, you will need to specify the other contact attempt in the blank field labeled *Other*.
- **Note:** A letter contact is always required, at a minimum.
- **Note:** Your district may determine what methods of contact are required. In order to do that, any user with administrative rights will be able to select the required methods of contact by going to Admin Online / Codes / Contact Methods.
- Leave the response blank until you hear back from the parent or guardian.
- Click on *save* when finished. If you have more than one contact attempt, repeat the steps above.

IEP/Notification/Meeting Participants

The screenshot shows the 'Meeting Participants' section of the IEP Online system. The left sidebar contains a navigation menu with 'Notification' selected. The main content area has a header with 'Meeting Participants' and a list of roles: Parent, General Education Teacher, Special Education Teacher, Psychologist, Principal/Designee, and Student. Each role is followed by a small circular icon. In the top right corner, there are buttons for 'Email' and 'Add Participant'. The page also includes a header with user information and a footer with version details.

- The last step in the *notification* tab is to add the *Meeting Participants* to the invitation.
- The participant titles will appear on if your district has set up this list in admin.online.
- To add in the names of the participants, simply click on the gray line and fill in the information.
- In the top right you will see the option *add participant*.

IEP/Notification/Bank of Participants

The screenshot shows the 'Bank of Participants' section in the IEP Online software. The interface includes a navigation menu on the left with options like Notification, Planning, Performance, Transition, Goals, Services, Care, Modifications, Testing, Prior Notice, and Progress. The main content area has a 'Bank of Participants' table with columns for Title, First Name, Last Name, and Add to Meeting. The 'Add to Meeting' column contains plus signs and icons. Below the table, it says 'Displaying 1 - 5 of 5' and 'IEP Online May 2013 Version 1.0.0 2013-05-01'.

Title	First Name	Last Name	Add to Meeting
Administrator/Designee			+ [icon]
Nurse			+ [icon]
Special Education Teacher			+ [icon]
Speech Language Pathologist			+ [icon]
Teacher			+ [icon]

- To access the bank of meeting participants, click on *bank of participants*.
- If the bank has already been set up, a list of meeting participant titles will appear
- To add a participant to the Meeting Participants list, click on the plus sign in the *Add to Meeting* column

IEP/Notification/Bank of Users

The screenshot displays the 'Bank of Users' section within the PCG Education software. The interface includes a top navigation bar with 'Home', 'Services/Solutions', 'User', and 'Admin' tabs. A secondary navigation bar shows 'Demographic', 'GT Eligibility', and 'Plan' options. A search area contains buttons for 'Student Roster', 'Find Student', 'Print', and 'Find'. The 'Bank of Users' section features search criteria for Employee ID, Name, Job Title, and Assigned Locations. Below this is a table of users with the following data:

First Name	Last Name	Title	Location	Add to Meeting
User	15			+
Demo	Account			+
Ann	Alicia	Special Education Secretary	Elementary 2	+
Marta	Chrzanowska			+
Marta	Cohen	QA		+
John	Doe	Admin		+
Yinny	Johnson	Teacher		+

- To access the bank of users, click on *Bank of Users*
- A list of users will appear that is pulled directly from the *Admin / Users* tab on the administrative side of the program.
- To add a user to the meeting participants list click the plus icon in the *Add to Meeting* column

IEP/Notification/Adding a Meeting Participant

The screenshot displays the 'Meeting Participant' form within the PCCG Education software. The form is titled 'Meeting Participant' and contains the following fields and options:

- Title:** A dropdown menu.
- Name:** A text input field.
- Position:** A text input field.
- Agency:** A text input field.
- Email:** A text input field.
- Excused:** A checkbox labeled 'Excused'.
- Parent Given Report:** A dropdown menu.
- Reason:** A large text area for providing details.

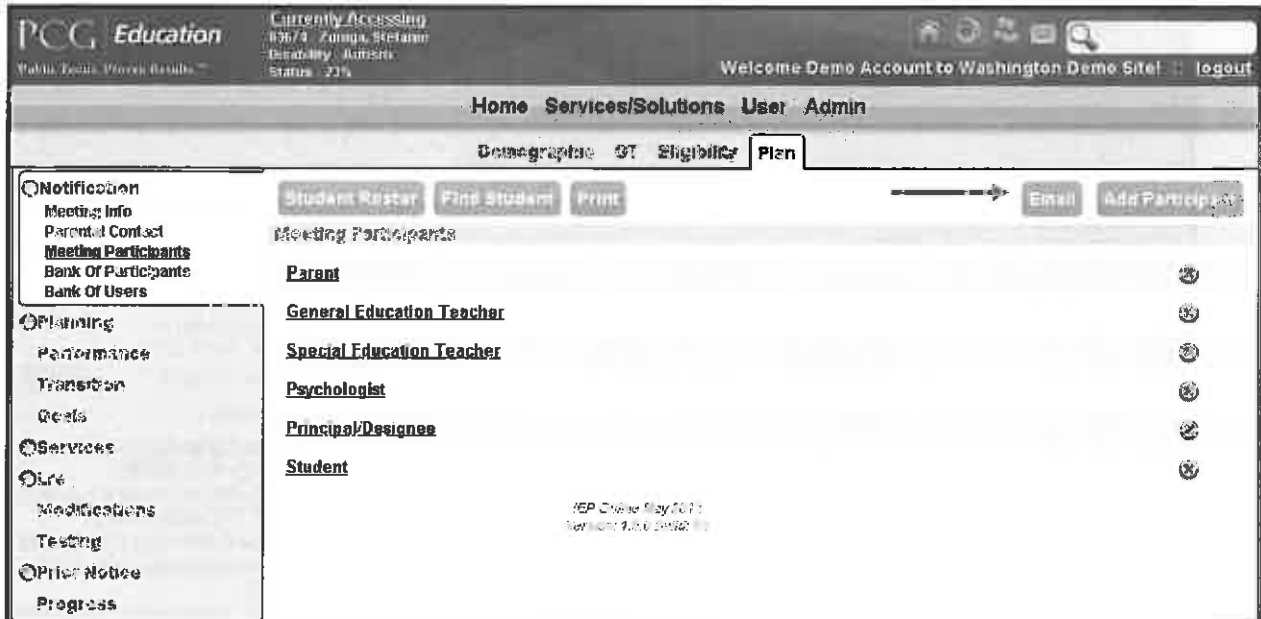
At the bottom left of the form, there is a '+' icon and a left-pointing arrow. At the bottom right, there are 'Save' and 'Cancel' buttons. The background shows the software's navigation menu and top header with user information.

- To add additional *Meeting Participants*, click *add participant* in the top right corner.
- Select the title of the participant and then enter his or her name, position, agency, if applicable, and email address.
- Meeting participants can be excused from IEP meetings as long as there is parent approval prior to the meeting date. If a participant is excused, check the *Excused* box. Indicate that the report with the excusal reason was given to the parent.

Note: If there isn't anyone excused from the IEP meeting this section will not print out as part of the IEP.

- To enter more than one participant, click on the + in the bottom left corner of the Meeting Participant window. The arrows are to toggle back and forth between meeting participants. Once you have added everyone, click on save to close the little window.

IEP/Notification/Emailing the Invitation



- Meeting notifications can be emailed from IEP Online. Check with your district on who can receive email notifications for IEP meetings. It is recommended that parents get a hard copy mailed home even if they receive an email.
- In order to use the email button shown above, there are few things that need to be completed first:
 - A meeting date and time in the future on *Meeting Info* screen
 - Contact person's email address needs to be filled in on *Meeting Info* screen
 - At least one purpose checked on the *Meeting Info* screen
 - At least one participant's email address needs to be entered
- All of the above requirements will enable the email button.

IEP/Planning

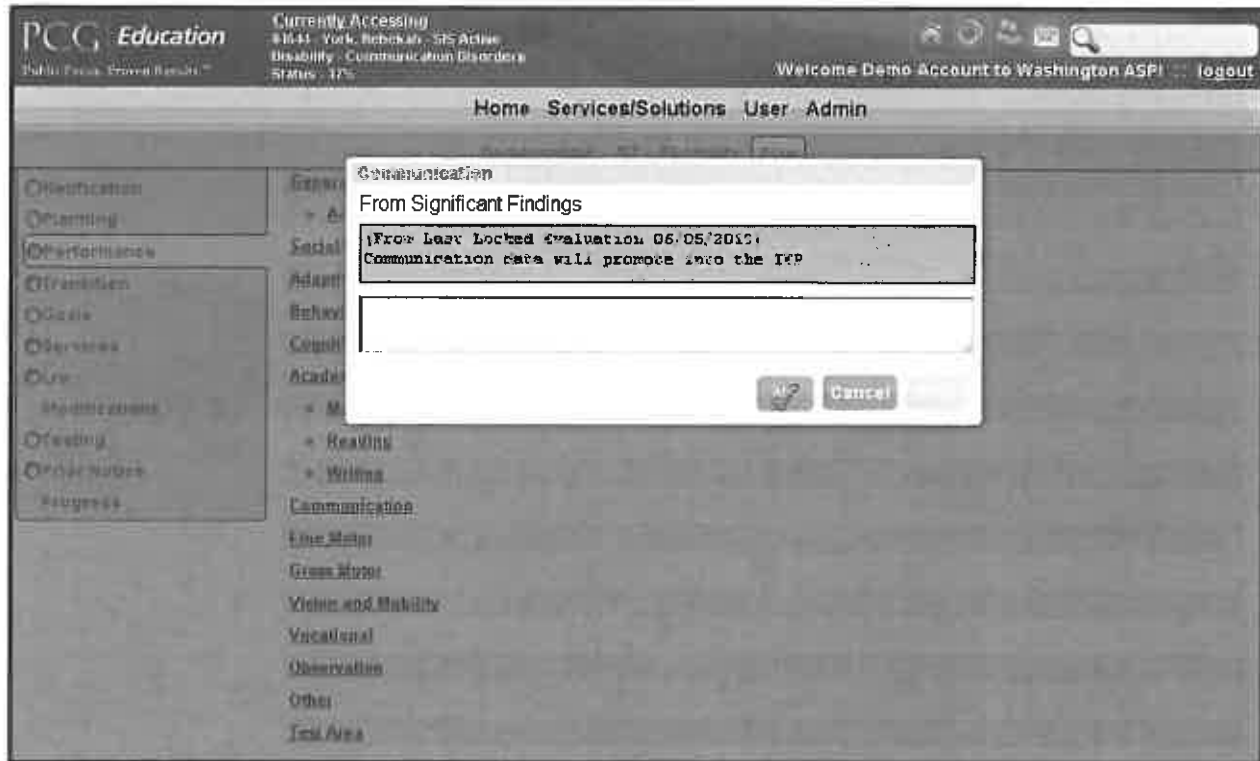
- In the *planning* tab, you **must** fill in the yellow *Start Date* and *End Date* in the top left corner for the IEP.
- If a student will be changing LRE settings during his/her IEP, select Yes from the drop down menu and type in *Start Dates* and *End Dates* for both of the LRE settings.
- In *Considerations* when you click on the gray line for each item, a pop up text field will appear. Use the toggle arrows at the bottom of the window to jump to the next consideration or click save after each one.
- If the student is turning 18 during the IEP, document majority rights notice and date, in the top right corner.
- *Medicaid consent* data is required. The dropdown offers three choices and the record can be locked with consent pending.
- In the bottom left, for students 9th grade and above, document the *Expected Graduation Date* and *Comments*.

IEP/Performance



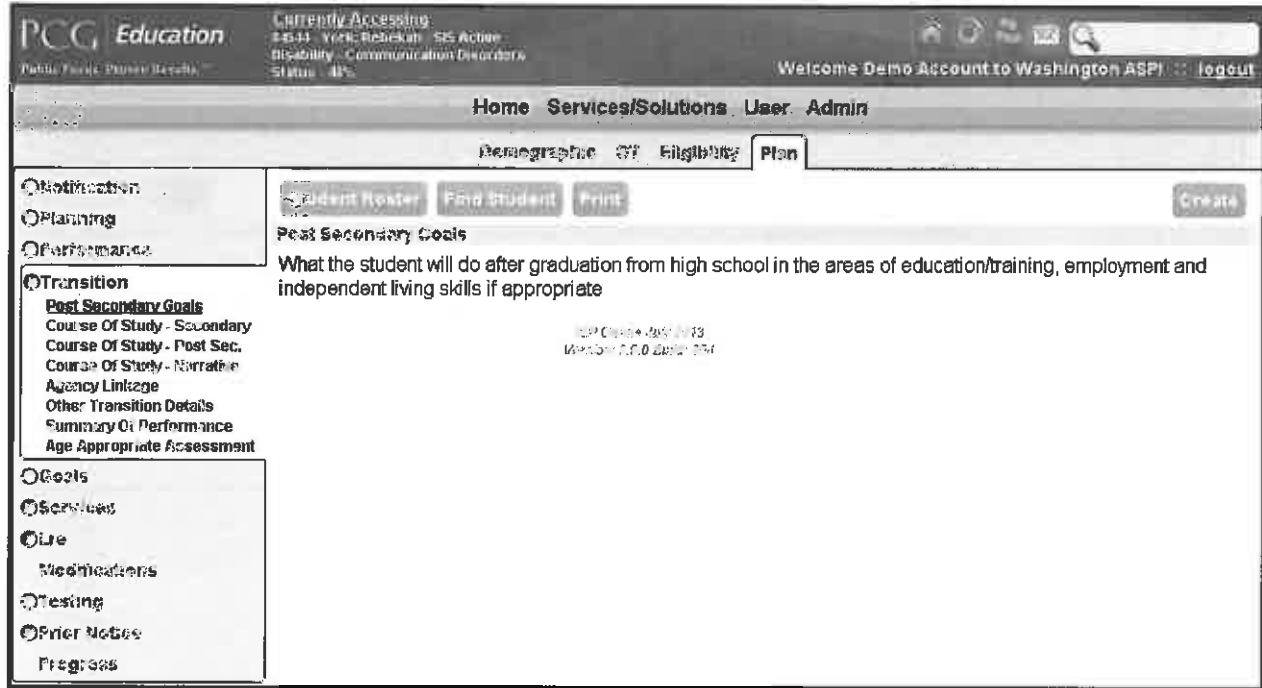
- The *performance* tab, offers the opportunity to document student’s present levels of performance, in all appropriate content areas, and the factors that may affect his or her progress.
- There must be data relating to student’s performance in the *General Education* area and *Adverse Impact Summary* subsection
- Select an area of performance by clicking on it.
- Each section and subsection can hold up to 33,000 characters

IEP / Performance / Significant Findings



- Once you click on an present level area a pop-out window will appear
- Any significant findings that were promoted from the latest eligibility will be in the top box of the performance area. This text field is not editable, but can be cut and pasted to the box below. Only the content in the bottom box will appear on the print form.
- There should be direct linkage between the student’s evaluation results, the level of performance and the other components of the IEP.

IEP/Transition



- *Transition* is only required for students, who are 16 years and older, including students turning 16 in the year of the current IEP. It may be filled out for other students but is not required in order to lock the record, unless the student is of transition age.
- The *Transition Areas* are broken into transition subsections on the left. The required elements of transition are:
 - *Post Secondary Goals* [Training, Employment and, as appropriate, Independent Living],
 - *Transition Services* for each *Post Secondary Goal*
 - *Course of Study* [Check with your district]
 - *Agency Linkage*. Other transition details can also be entered as appropriate.
 - *Age Appropriate Assessment Narrative* areas:
 - Needs
 - Strengths
 - Preferences
 - Interests
- To access *Transition Areas*, the user will need to click on **each** area on the left in order to complete the transition, which will show up on the right hand side of the screen.

IEP/Transition/Summary of Performance

PCG Education
Public Focus. Proven Results.™

Currently Accessing
48544 York, Rockwell, SIS Active
Disability, Communication Disorders
Status: All

Welcome Demo Account to Washington ASPI :: Logout

Home Services/Solutions User Admin

Demographic OF Eligibility Plan

Student Roster Find Student Print

Summary of Performance

Completed By

Completed Date

Date Formally Identified 06/05/2013

Completed By

Title

Email

Phone

Education/Training **Reading**

Employment **Math**

Independent Living **Written Language**

Other Recommendations **Functional Performance**

Identification
 Planning
 Performance
 Transition
 Post Secondary Goals
 Course Of Study - Secondary
 Course Of Study - Post Sec.
 Course Of Study - Narrative
 Agency Linkage
 Other Transition Details
Summary Of Performance
 Add Appropriate Assessment
 Goals
 Services
 Life
 Modifications
 Testing
 Prior Needs
 Progress

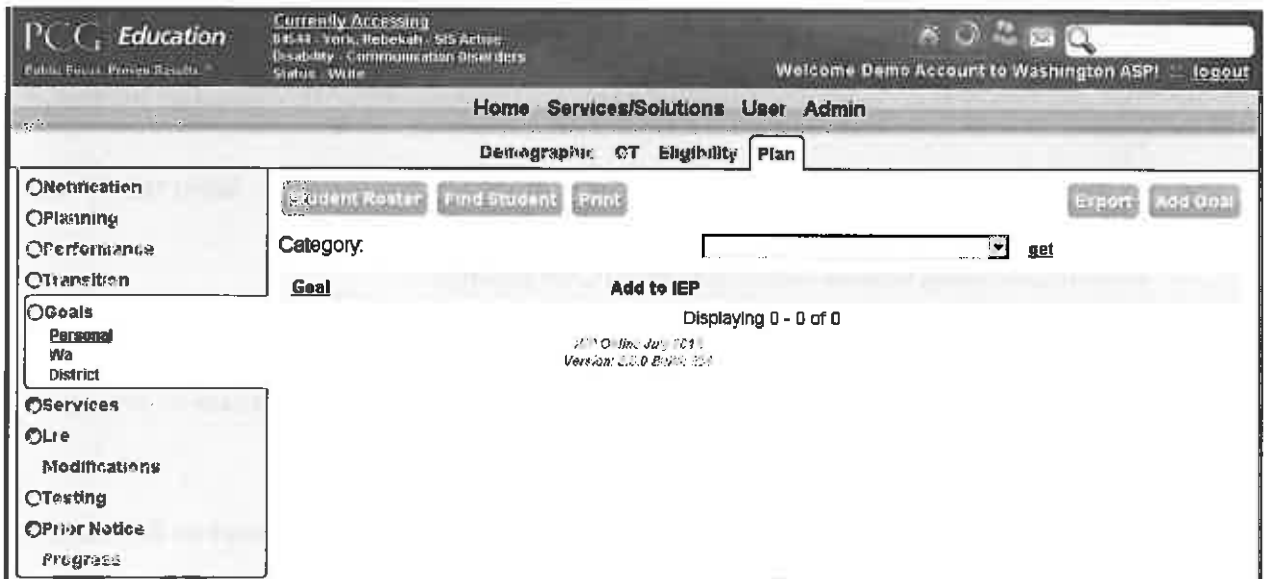
- *Summary of Performance* is required for students exiting the program through graduation or aging out. It can also be accessed on this screen.

IEP/Goals



- On the *goals* tab, click on the green *create* button to write an annual goal.
- An IEP can have an unlimited number of annual goals and within each goal there can be multiple objectives. To keep all of this information organized, each annual goal has its own screen.

Note: Goals added using the green *Create* button will only be added to the current IEP. For goals that may be used/edited for future use in other IEPs, click on *Goal Bank* then click *add goal*



IEP/Goals/Add Goal

The screenshot shows a web form for adding a goal. The form is titled "Goal" and has the following fields:

- By:** 06/11/2014
- Title:** A dropdown menu.
- When Given:** A text input field.
- Student Will:** A text input field.
- Improving:** A text input field.
- From:** A text input field.
- To:** A text input field.
- As Measured By:** A text input field.
- Supports the student's post secondary goals/outcomes:** A dropdown menu.
- Report Interval:** A dropdown menu.

At the bottom right of the form, there are two buttons: "Save" and "Cancel".

- The attainment date, or *by* date, populates with the end date of the IEP entered on the planning tab.
- In the title drop down, choose any SDI selected in the last locked Eligibility. Select the SDI area in the drop down to create the first goal.
- Fill in the following fields to formulate the goal, for instance:
 - *"When given _____, Student will _____ improving _____ from _____ to _____ as measured by _____"*
- If the goal supports the student's post secondary goals/outcomes, then indicate it using the drop down menu.
- Identify the *Report Interval* for this goal.
- Click the *save* button to add the annual goal. The name of the goal will appear on the left panel of the *goals* screen.

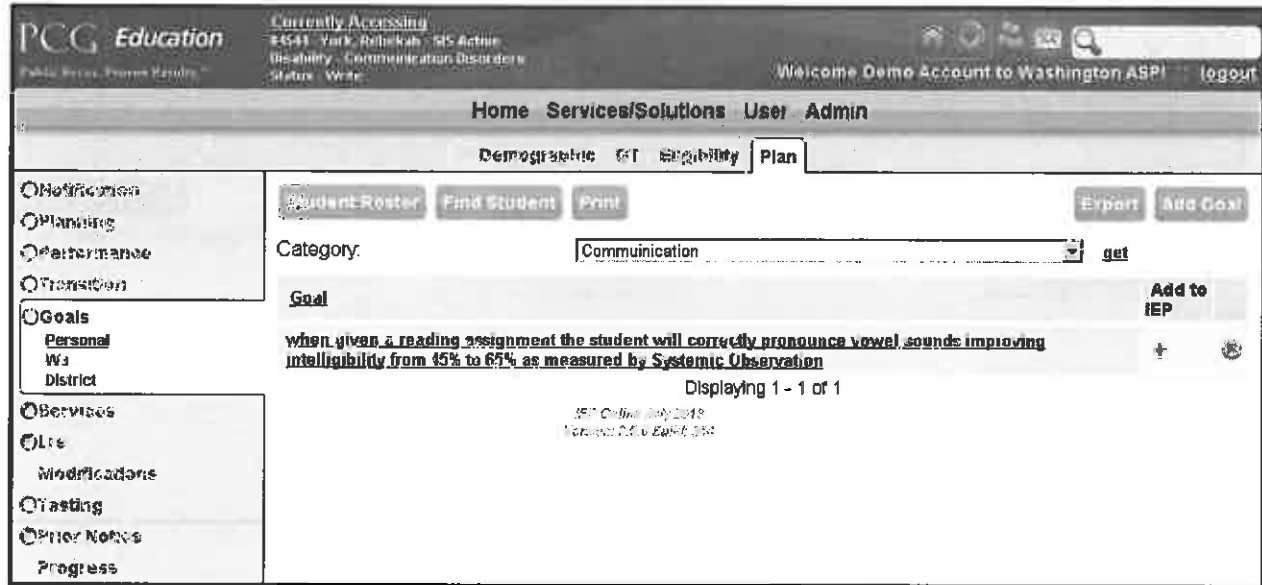
IEP/Goals/Bank of Goals



- You may also add a goal using the *bank of goals*.
- Choose any goal from the *bank of goals*. You may use Personal, State, or your District's bank of goals, which has been predefined in IEP Online.

Note: Types of goal banks that you see in IEP Online are determined in the administrative side of IEP Online. If an administrator in your district decides to hide the state bank of goals, you will not see the WA left tab, once you click on *bank of goals*.

IEP/Goals/Personal Bank



- When new users click on the personal bank for the first time the bank will be empty. The personal bank is designed to store all goals that are created by the user and saved in the personal bank. The goals can then be used for all students the user has access to.
- To get started, click on *add goal* on the right side of the screen as shown above.

Note: Only the creator of the goals can see them in their own personal banks.

Note: All types of goal banks can be exported and imported into IEP Online from the administrative side of IEP Online in Admin Online / Imports.

IEP/Goals/Personal Bank/Add a Goal

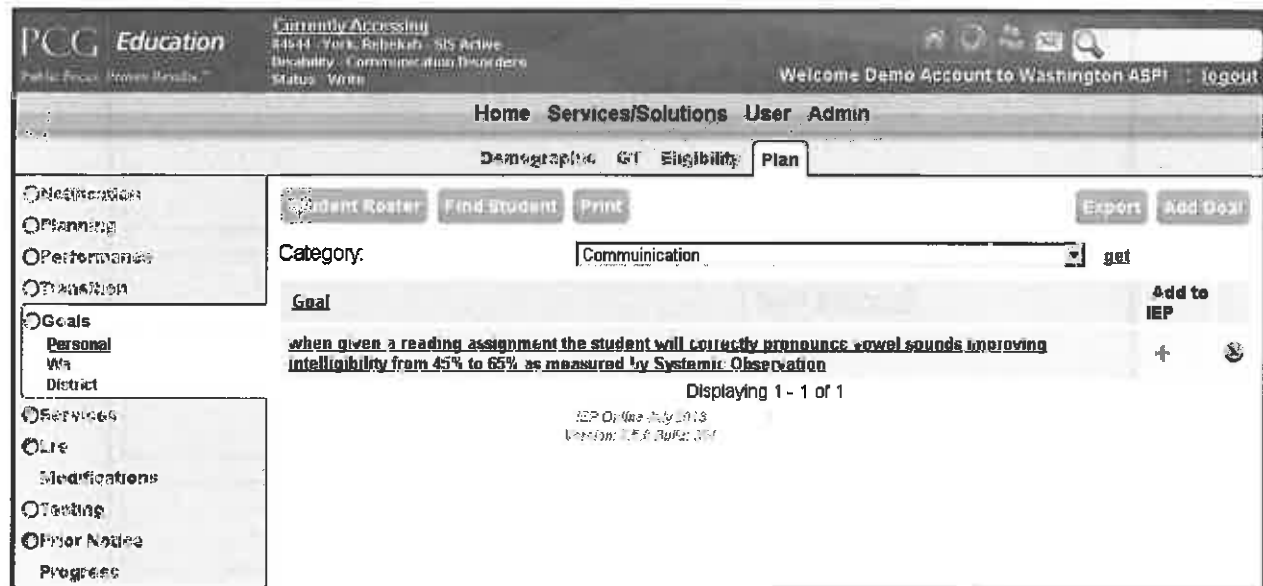
The screenshot shows a web-based form titled "Personal Goal". The form contains the following fields from top to bottom:

- Category:** A dropdown menu with a downward arrow.
- When Given:** A text input field.
- Student Will:** A text input field.
- Improving:** A text input field.
- From:** A text input field.
- To:** A text input field.
- As Measured By:** A text input field.

At the bottom right of the form, there are two buttons: "Save" (with a checkmark icon) and "Cancel".

- After clicking on *add goal*, the above goal template will appear.
- The category drop down is blank at first. Click in the *Category* box and type in the first goal you wish to create. The categories will save in the drop down each time you type a new one in the *Category* field.
- Enter in the *When given*, *Student will*, *Improving*, *From*, *To*, and *As Measured By* fields, and hit *save*, when finished.

IEP/Goals/Personal Bank/Accessing Goals

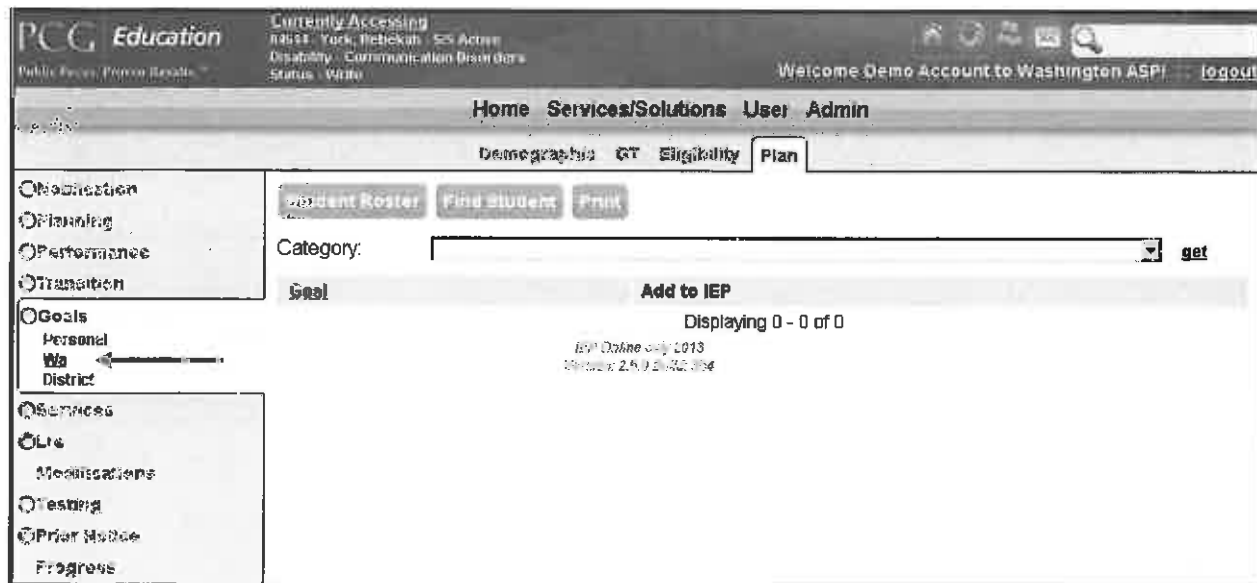


- After clicking *save*, the goals will be listed in the *Personal* subsection in the *category* dropdown in the goal bank screen.
- To access a goal, click on the *category* dropdown and all goals that have been added to the goal bank will appear.
- To add a goal from the personal bank to the student's IEP:
 - Select a goal category from the *category* dropdown
 - Click on the blue *get* button to display the goals within that category
 - Click the grey plus icon in the *Add to IEP* column to add the selected goal to the IEP
- Click on the red 'X' icon to delete a goal from the personal goal bank.

Note: If you delete a goal and there is only one goal for that category, the category will be deleted as well.

Note: There is no limit to how many goals you create in your personal bank.

IEP/Goals/Bank of Goals/State Goals



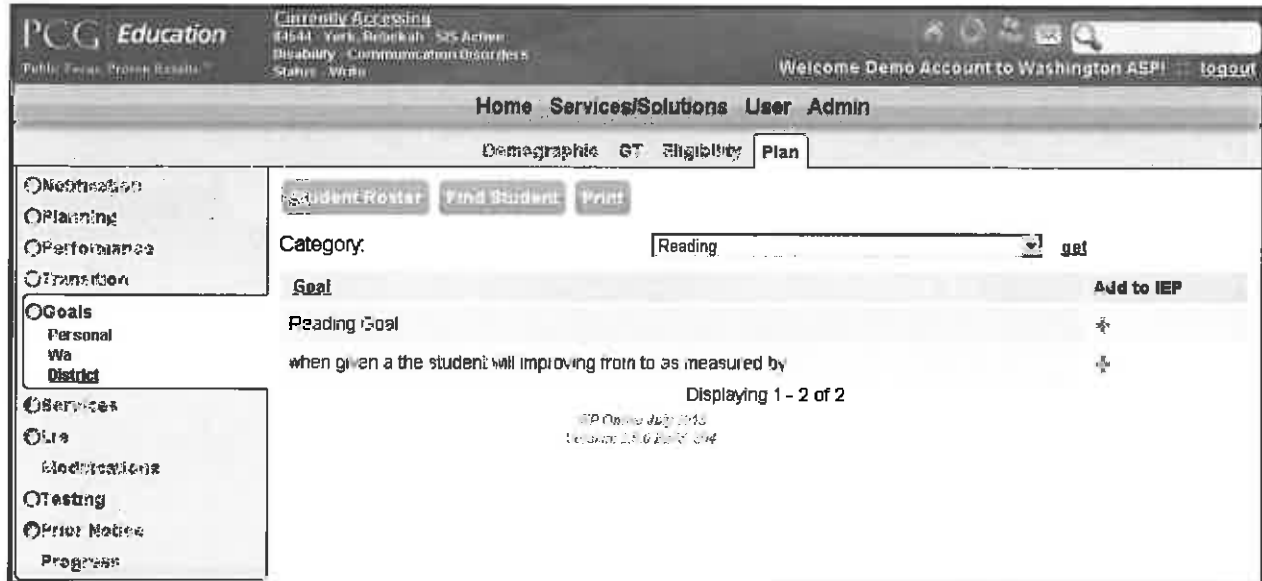
- The next tab on the left in the *Bank of Goals*, are the state goals.
- PCG pre-populates these goals from the state of Washington. While the state bank offers suggestions in a variety of content areas for goals, the goals are not fully cross-referenced to current Washington Learning Standards.

Note: If an administrator in your district decides to hide the state bank of goals, you will not see the WA left tab.

IEP/Goals/Bank of Goals/Accessing State Goals

- To add a goal from the state goal bank to the student’s IEP:
 - Select a goal category from the *category* dropdown
 - Click on the blue *get* button to display the goals within that category
 - Click the grey plus icon in the *Add to IEP* column to add the selected goal to the IEP
- Click on the red ‘X’ icon to delete a goal from the personal goal bank.

IEP/Goals/Bank of Goals/District Goals



- The 3rd subsection in the *Bank of Goals* is the District Bank of Goals.
- This tab is managed on the admin side of the program. It is up to the district to enter district goals on the admin side for staff to use in IEP Online.
- If this tab is blank, check with your district about plans for district goals.

Note: All types of goal banks can be exported and imported into IEP Online from the administrative side of IEP Online in Admin Online / Imports.

IEP/Goals/Objectives



- To add objectives under a given goal click the *Objectives* line directly below the goal title.
- To add an objective to the current goal, click on the green *create* button in the top right.

IEP/Goals/Add Objective

The screenshot shows a web application interface for adding an objective. The top navigation bar includes 'Home Services/Solutions User Admin'. The left sidebar lists various categories like 'Observation', 'Observing', 'Performance', 'Transition', 'Goals', 'Communication Objectives', 'Services', 'Care', 'Modifications', 'Testing', and 'Final Notes Progress'. The main content area is a form titled 'Objective' with the following fields:

- Title:** when given a reading assignment Rebekah will correctly pronounce vowel sounds improving intelligibility from 45% to 65% as measured by Systemic Observation
- Attainment Date:** 06/11/2014
- Description:** (empty text area)
- Comment Date:** (empty text field)
- Display Order:** (empty text field)
- Comment:** (empty text area)
- Mastery Criteria:** (empty text field)
- Evaluation Method:** (empty text field)
- Other Evaluation:** (empty text field)

At the bottom left of the form is a '+' icon, and at the bottom right is a 'save' button.

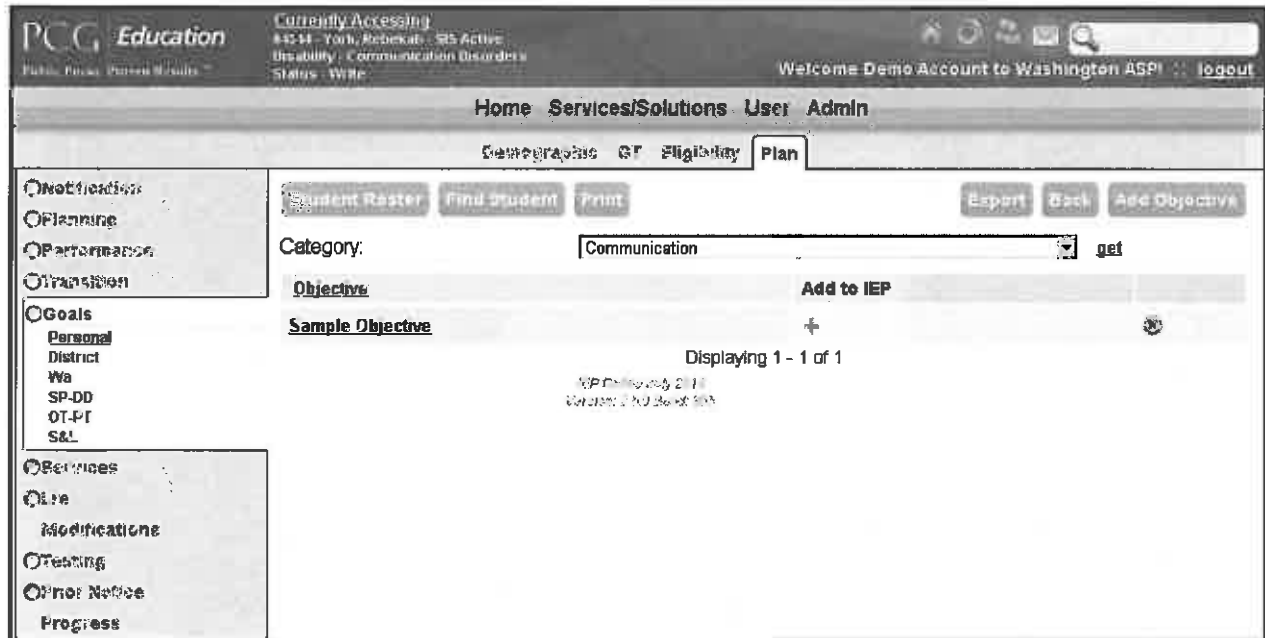
- To add an objective to the current goal, click on the green *create* button in the top right
- and enter in the *Title* and a *Description* of the objective.
- The comments section is for later when you are updating progress reports for parents.
- Enter in the *Mastery Criteria*, *Evaluation Method* and/or *Other Evaluations*.
- Click on *save* to save and close the objective window or click on the + in the bottom left corner to save and a new window will appear to add in the next objective.
- The arrows in the bottom left corner will highlight once you have added at least two objectives and will allow the user to toggle back and forth between objectives.

IEP/Goals/Objectives/Bank of Objectives



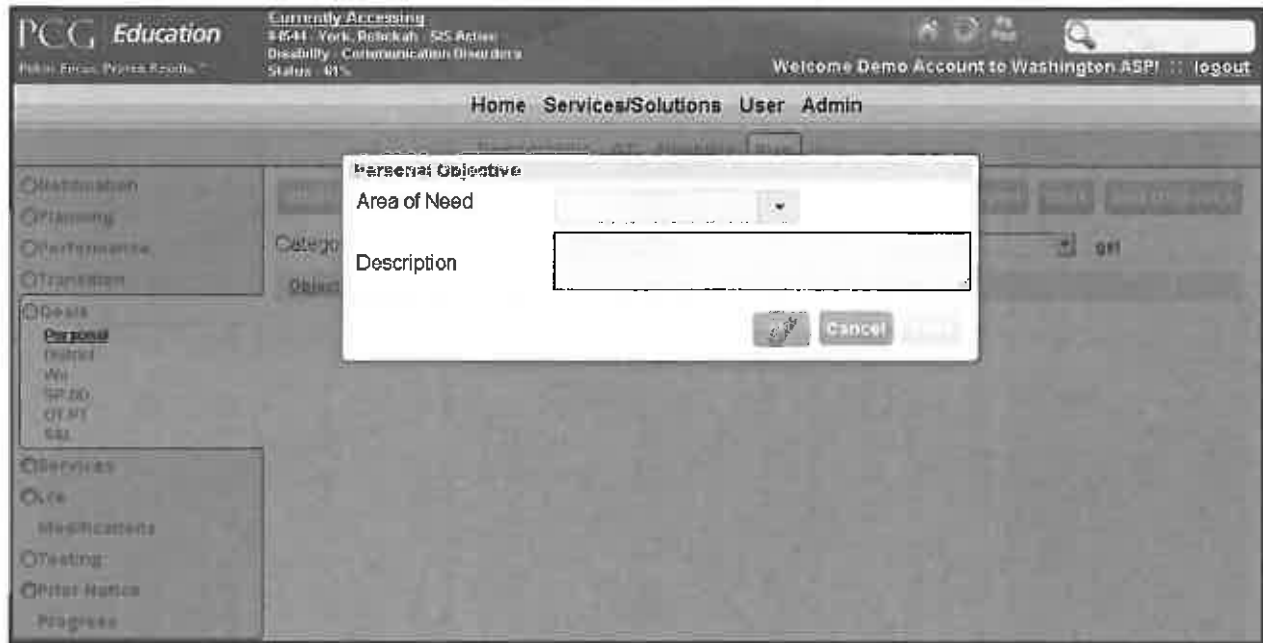
- To access the bank of objectives click on *bank of objectives*.

IEP/Goals/Bank of Objectives/Personal Bank



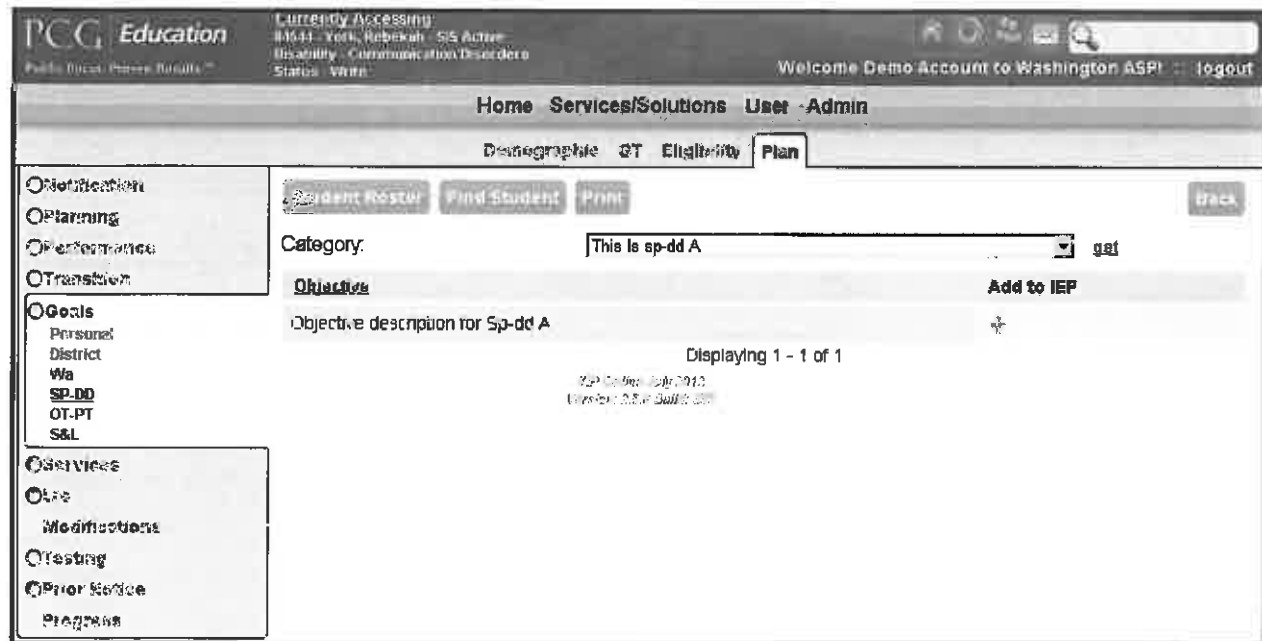
- The first tab in the *Bank of Objectives* is the *personal* tab.
- The personal tab is where users can store personal objectives to use for their students.
- The next tab is the *wa* tab, which is not populated into IEP Online and can be ignored.
- *SP-DD* is the severely profound and developmentally delayed tab which is pre-populated and available for use.
- *OT-PT* is the occupational therapy and physical therapy tab which is pre-populated and available for use.
- *S&L* is the speech and language tab which is pre-populated and available for use.

IEP/Goals/Bank of Objectives/Add Personal Objective



- To add your personal objectives, click on *add objective* in the top right corner.
- You will see an *Area of Need* drop down which will save your categories for future use after you type them in the first time.
- When you use this feature for the first time, the personal bank of objectives will be blank, so just click in the category area and type in the first category.
- Type in the description of the objective and click *save* when finished.

IEP/Goals/Bank of Objectives/Preset Banks



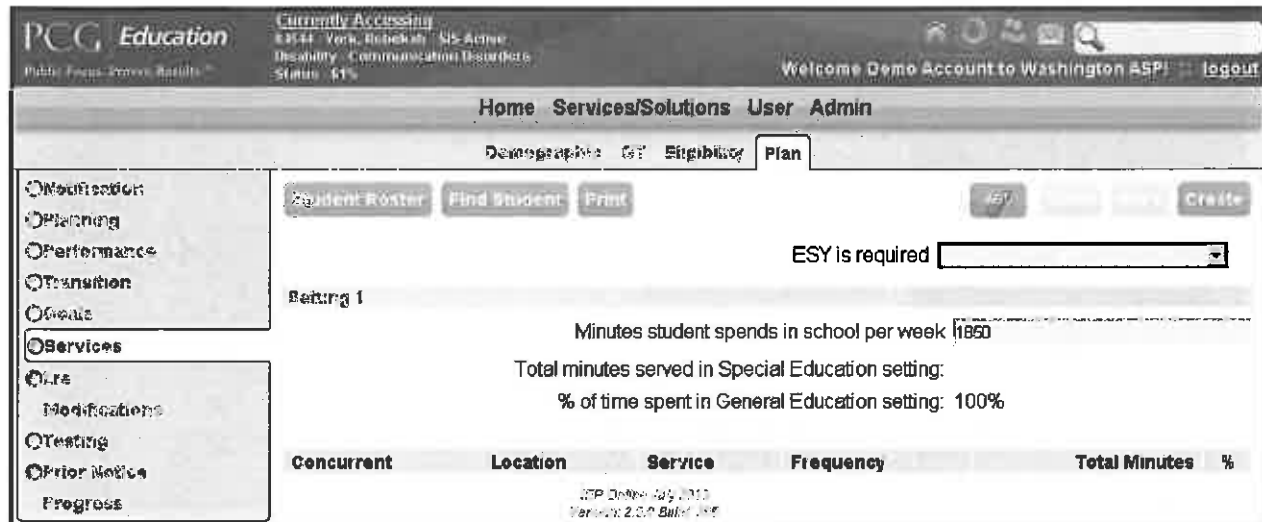
- Above is an example of what the pre-populated bank of *sp-dd* objectives looks like.
- The preset categories will appear in the *Category* dropdown
- To see the objectives for each category, select the category from the dropdown and the objectives will appear on the table below
- To add an objective to the student's IEP, click on the plus sign
- Once added the student's IEP, the objective can be edited to match the student's needs.
- Use this workflow to add objectives from any of the three *Preset Banks*

IEP/Goals/Progress Reporting

- Once the objectives are added, the next step is to select the *Goal Progress Reporting* methods.
- These checkboxes to report on goal progress were created on the admin side by your district administrators.
- Check all that apply for the way progress will be reported to the parents.
- Be sure to select the appropriate *Reporting Interval* in the drop down. Choices are *Quarterly, Monthly, Weekly, Semester, or Other*.

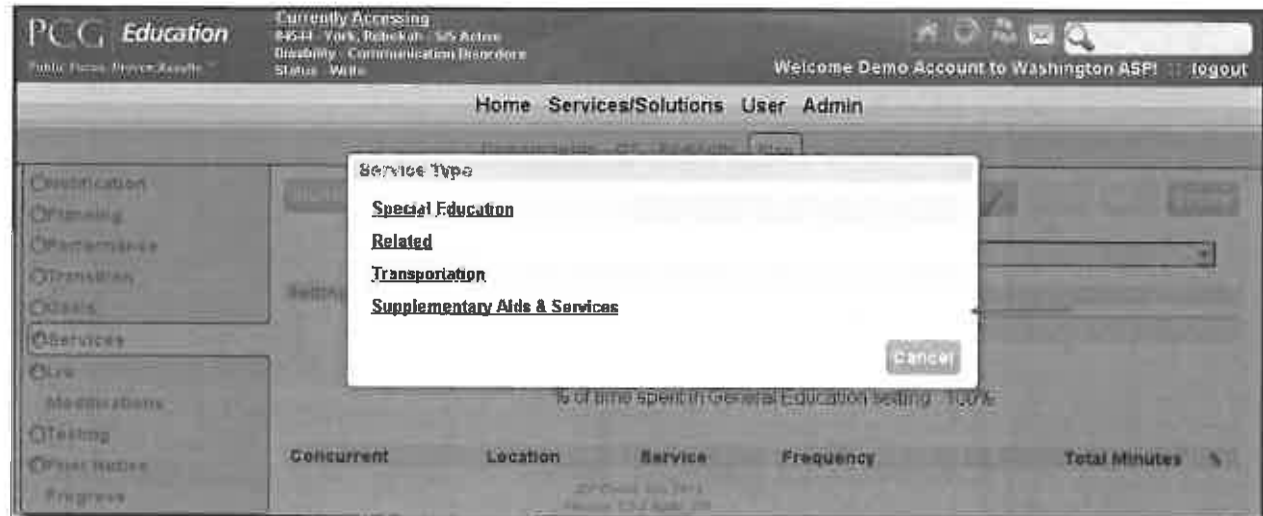
Note: When an IEP is unlocked, teachers will be able to update goal and objective progress reports, but will not be able to print them until the IEP is locked.

IEP/Services



- The next tab is *services*.
- IEPs require at least one service to be created in order to lock the IEP.
- The *minutes student spends in school per week* populates from the Admin side of the program.
- Based on the services you add to the IEP, the system will calculate the minutes of service and the percentage of time the particular student is in a general education environment. This calculation will appear on print forms.
- To create services, hit the *create* button in the top right corner.

IEP/Services/Create



- In the *Type* drop down list, select from *Special Education*, *Related*, *Supplementary Aids and Services*, or *Transportation* to identify the type of service you will create.

IEP/Service/Special Ed Service

The screenshot shows a form titled "Service" with the following fields and values:

- Concurrent Service: No
- Type: Special Education
- Disability: Communication Disorders
- Service: (empty dropdown)
- Location: (empty dropdown)
- Service Provider: (empty dropdown)
- Service Monitor: (empty dropdown)
- Length of Session: (empty text box) (empty dropdown)
- Number of Sessions: (empty text box) times (empty dropdown)
- Select Date Range: (empty dropdown)
- Start Date: (empty text box)
- End Date: (empty text box)

Buttons: OK, Cancel

- At the top of this window there is a dropdown where staff members can indicate if a service is occurring at the same time as another service.
- Selecting concurrent ensures that the service minutes will not be counted twice

Note: If a teacher and a paraprofessional work with a student at the same time, both services should be listed, and one of them should be then marked as concurrent.

- The type of service will appear in grey at the top and the disability will automatically populate based on what was determined in the last locked eligibility record in the eligibility tab.
- In the *Service* drop down, the SDI areas are pulled from the most recent locked eligibility record. The same SDIs are pulled into the *goals* tab.

-
- There are two choices for the location where the service will take place – General Education or Special Education. Check with your district if you need further clarification on the location of service.
 - Enter *Staff Responsible* and *Service Monitor*. If unclear, check with your district on expectations on what to enter here.
 - *Length of Session* is the length of the service. Select the right intervals from the drop down, for example 55 minutes, 30 minutes, 1 hour etc.
 - *Number of Sessions* is the frequency. Select the right frequency measurement from the drop down, for instance: 3 times weekly, 1 time monthly etc.
 - To select a *Start Date and End Date* click on the highlighted dropdown where you can choose from the IEP start to IEP end date that is listed in the *Planning* tab, or select *Other* to enter custom dates
 - Selecting *Other* makes the date fields at the bottom of the window editable
 - Click on *save* when finished. If you need to add another Special Education, Related Services, Supplementary Aids/Services, or Transportation service, click on *create* and repeat the steps.

IEP/Services/At a Glance

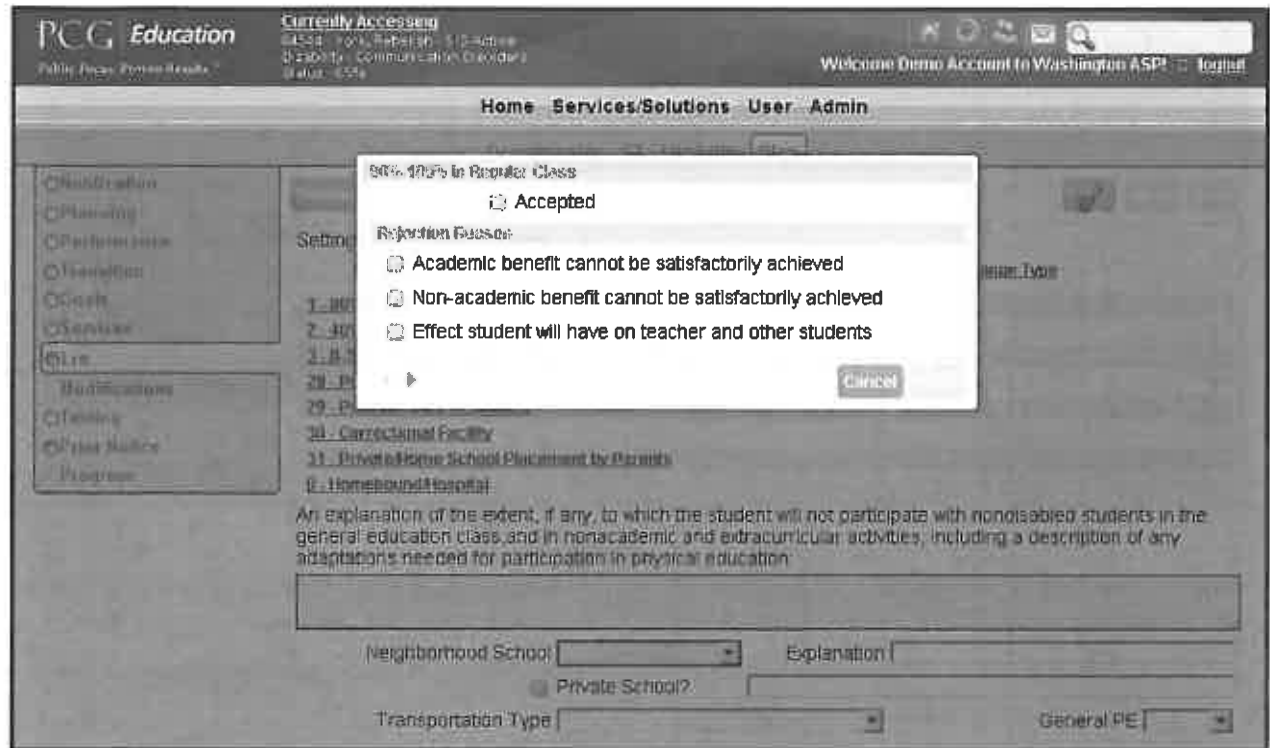
Concurrent	Location	Service	Frequency	Total Minutes	%
<input checked="" type="checkbox"/>	06/12/2013 - 06/11/2014	Special Education	Speech Therapy	45	97.57%
			15 Minutes / 3 Times Weekly	45	

- The services added will group together based on start date of the services.
- If there are any concurrent services the grey checkbox on the left will be checked.
- Above the services matrix, there is the *At a Glance* section. Here is where you will get the total minutes served in Special Education setting, the recommended LRE placement option and the percentage of time spent in General education setting.
- At the top of the Services screen, fill in the *Transportation Type*, *General PE* and *ESY*, which is required.

IEP/LRE

- Least Restrictive Environment (LRE) placement is based on the student’s age and also what is configured by district administrators for each grade level.
- If a student is younger than six years old then the only options will be EC: 3-5.
- If a student is six years old or older then the only option will be SA: 6-21 Years Old.
- Birth-2 is available for students assigned to grades that have the LRE setting in admin/codes/grades
- On the *services* screen, in the *At a Glance* section, there is a recommendation for LRE placement based on the services entered and amount of minutes in the general education setting for the student. It is based on the calculation of service minutes and location of services; however it is recommended, that the IEP Team collaboratively determine the LRE.
- Select the right *Setting Type* by clicking on *Select/Change Type* and selecting the setting from the dropdown

IEP/LRE/Placement Options

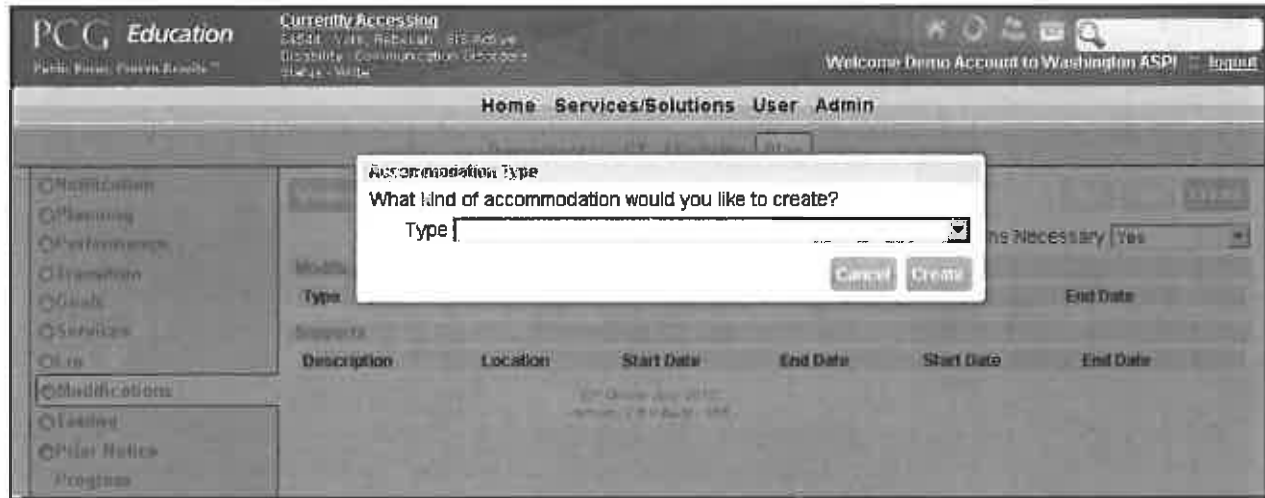


- Click on the appropriate placement option as shown on the left of the LRE screen. You may click back on the services tab to see the recommended placement.
- Check *Accepted* if appropriate. If rejected, check the appropriate reason. You can use the arrows to toggle to the next option. Below is an example. Click on *save* to accept the best LRE option for the student.
- If it was marked as accepted it will appear with a green check mark and if rejected a red X sign next to the placement option in the list.
- Enter in *An explanation of the extent, if any, to which the student will not participate*. Also indicate if the student is attending a *Neighborhood School* or *Private School* and provide additional information, if needed.

IEP/Modifications and Supports for School Personnel

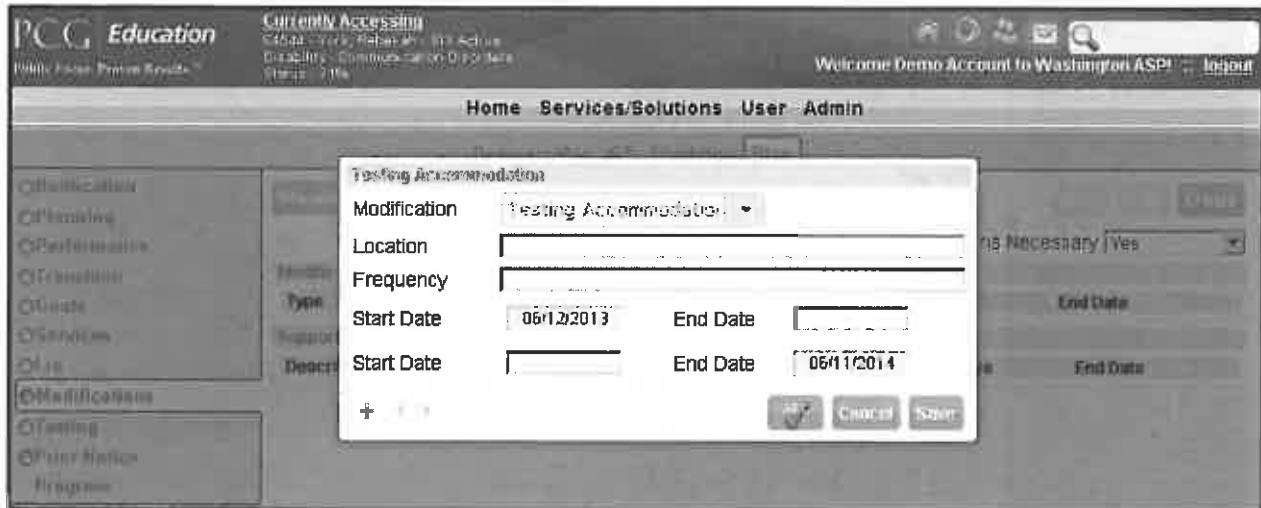
- *Modifications* is where you can add in all classroom modifications, and testing accommodations for the student.
- At the bottom of the screen is where you enter in *Supports for school personnel* such as trainings, professional development, etc.

IEP/Modifications & Supports/Create



- Indicate if Accommodations or Modifications are necessary for the student by selecting 'Yes' or 'No' in the *Accommodations or Modifications Necessary* dropdown
- Use this workflow to create a Modification:
- Click *Create* to add either an Accommodation/Modification or support
- In the first dialogue screen that appears, indicate if a Modification or Support is being created
- If a Modification is selected in the first dialogue window, in the next dialogue window select what type of Accommodation/Modification is being created
 - The testing accommodations and modifications are all managed on the admin side of the program. They are determined by your district and set up by your district administrator. Users can select any modification or accommodation from the list provided in the drop down.
 - To add classroom accommodations, hit *create* and select the right area from the *Type* drop down menu.
 - The testing accommodations will pull over into the *testing* tab within the IEP.

IEP/Modifications/Testing Accommodations



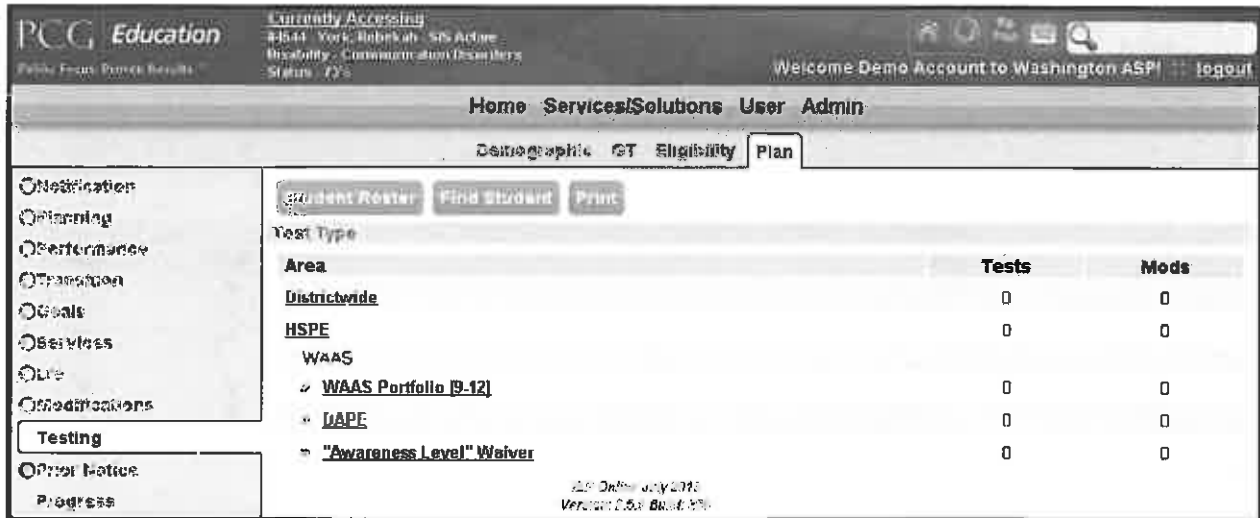
- The drop down choices for the *Modification* will change based on the type of accommodation you selected on the previous screen.
- Fill in the *Location* and *Frequency* of the accommodation and click *save* when finished.
- Repeat this step for every accommodation you need to add for the student.
- All the accommodations added to IEP will carry over from your first IEP to the next one to make it easier when writing future IEPs.

IEP/Testing

Area	Tests	Mods
WASL	0	0
Districtwide	0	0
HSPE	0	0
WAAS		
> WAAS Portfolio I9-12I	0	0
> DAPE	0	0
> "Awareness Level" Waiver	0	0

- The *testing* tab displays tests that are appropriate based on the grade of the student.
- These required state and district tests are set by the district and the testing categories and sub categories are all managed on the administrative side of IEP Online.
- To access a test, click on the *Test Type* on the left.

IEP/Testing/Adding Assessments



- The order that the tests appear in is configured by district administrators
- If the a student is taking a test in any of the areas displayed on this apge, click on the name of the testing area to add the assessments the student will be participating in to the IEP.
- The screen below will appear after clicking on the name of a test. Click the green *Create* button to select the tests that the student will be taking.
 - *Explanation for Alternate Assessment* can be a required field for each test, check with your District administrator to get a list of which tests require the explanation field

Explanation for Alternate Assessment

Tests

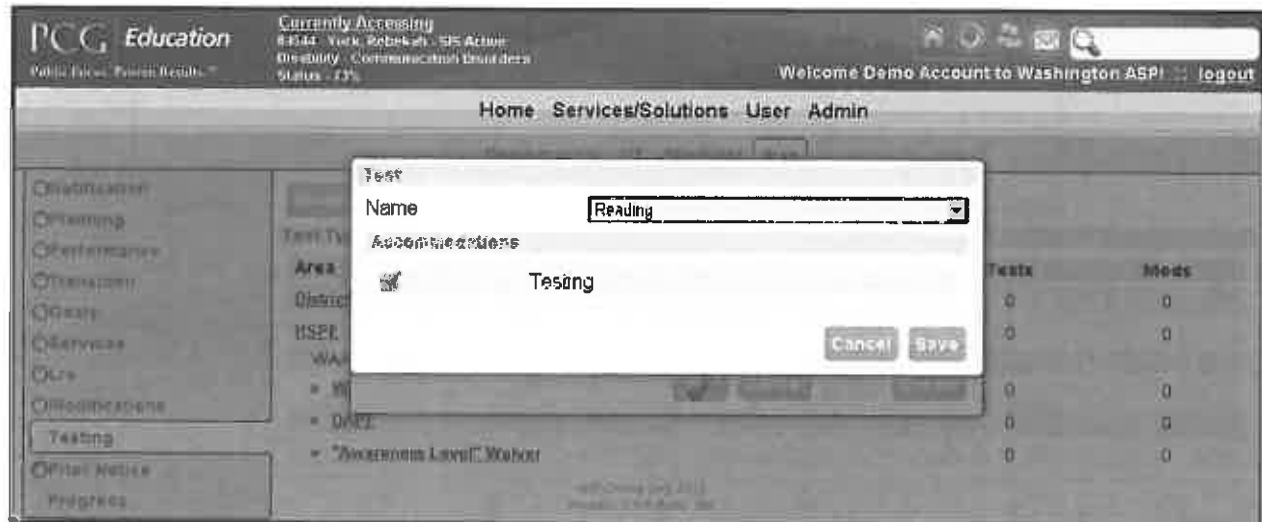
Test	Mods

- The after clicking the green *Create* button the window below will appear

The screenshot shows a dialog box titled "Test". It contains a "Name" dropdown menu. Below the dropdown is a section titled "Accommodations" with a checklist. The checklist has one item, "Testing", which is checked. At the bottom right of the dialog are "Cancel" and "OK" buttons.

- Select the test the student will be participating in from the *Name* dropdown
 - If the test allows a testing accommodation, the accommodations will appear as a checklist below the test name dropdown as seen above

IEP/Testing/Selecting testing accommodations

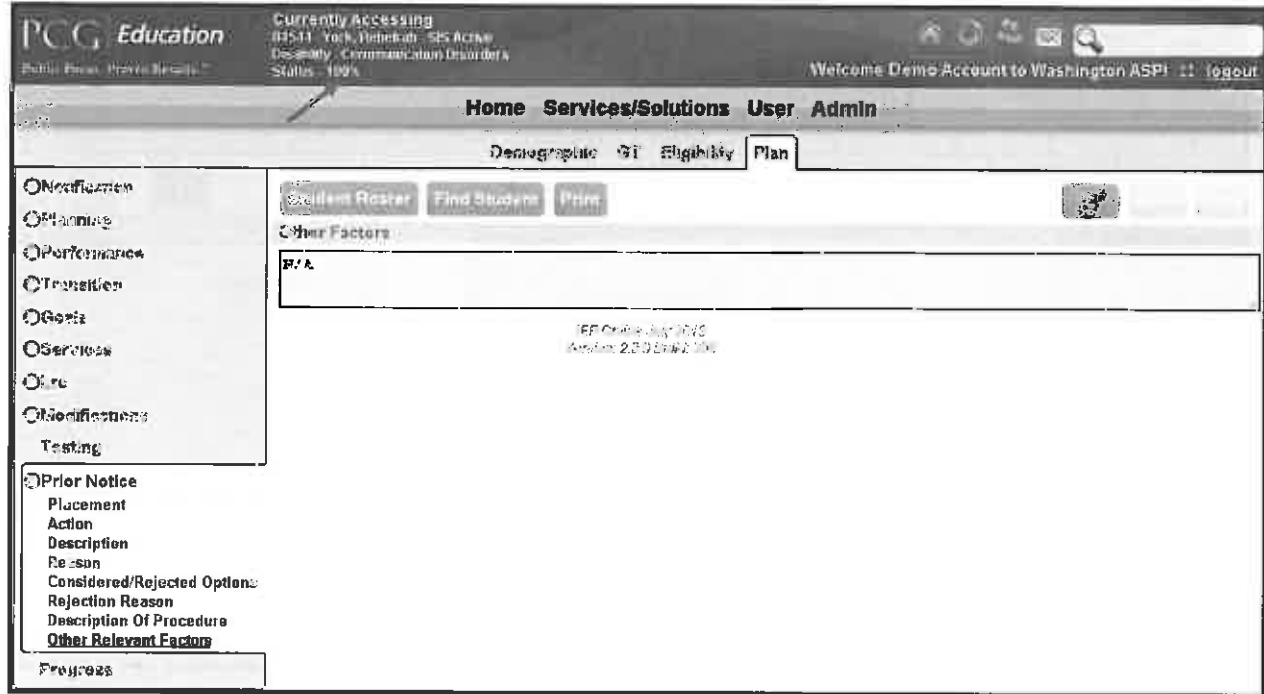


- You can select as many accommodations as needed for that test and the student.
- If the *Accommodations* box is blank, then you need to save and go back one tab to the *modifications* tab and create your testing accommodations and then come back to the *testing* tab to add the newly created testing accommodation.
- If the student is participating in more tests, then chose the next test type on the right and follow the same steps.

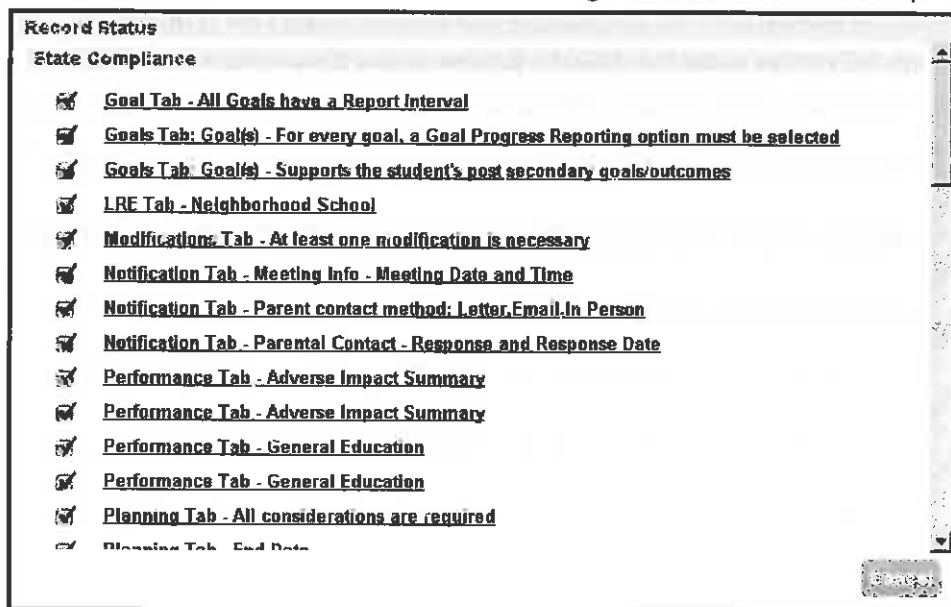
IEP/Prior Notice

- The *prior notice* tab is where users document the team decisions. Users will need to document all that was discussed in the IEP meeting.
- In the *Placement* section, document if parental Consent for Initial Services was given and the date when the consent was received.
- In the *Action* section only the *Notification* and *Initiation* dates are required.
- In the top left corner enter the date the parent received the prior notice and enter your contact information below. Also, in *Part 1 – Propose or Refuse* and in *Part 2 – Initiate Change, Continue or Discontinue* and then select the type of action. For instance, in case of Initial IEP you will select *Propose* in *Part 1*, and *Initiate IEP* in *Part 2* and *Type*.
- The remaining sections (*Description, Reason, Considered/Rejected Options, Rejection Reason, Description of Procedure and Other Relevant Factors*) all the team to document items that were discussed during the meeting.

IEP/Record Status Percentage

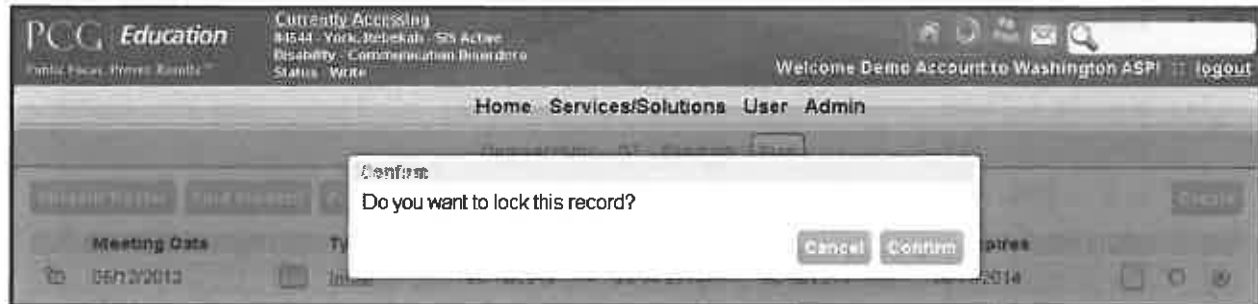


- After completing the *prior notice*, the user will want to click on the record completion percentage located at the top of the screen under the student's *Disability*
- This will open up a checklist of all of the fields relating to State and Federal Compliance



- Users can check if the record components are compliant with state and federal standards, which are highlighted in yellow inside the record.
- If the record status completion percentage is 100% and all left tab Status dots are *Green* then record can be locked. Click *on* the *plan* top tab to return to the main screen to lock the record.
- If the record status completion percentage is not 100%, the record is not ready to be locked. Use the scroll bars in the *State Compliance* and *Federal Compliance* sections of the *Record Status* pop up window to find what pieces of the record still need to be filled out. You may click on the unchecked grey section from the *Record Status* pop up window and the program will take you to the section that is still missing information.

IEP/Locking the IEP



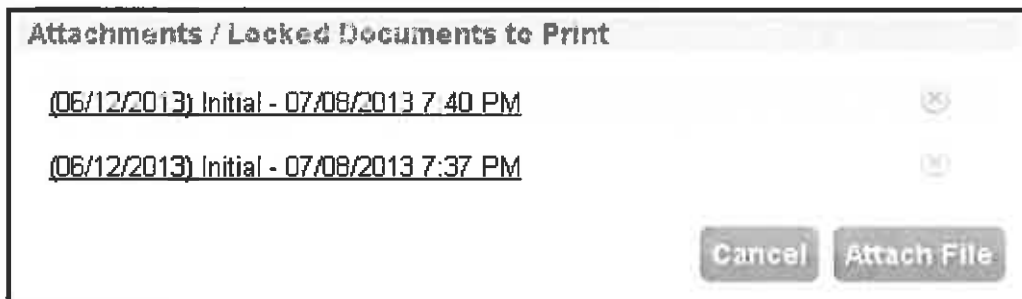
- After clicking the *Plan* top tab to return to the *plan* main screen click on the there is a padlock icon on the left of the gray line to lock the IEP. Confirm your action by hitting *confirm* button on the pop up message.
- After the record is locked, you will not be able to make any revisions to the record.

Note: Once the record is locked, the only active sections inside the IEP will be *Goal Progress Report* and *Summary of Performance* if the student has any goals entered in IEP.

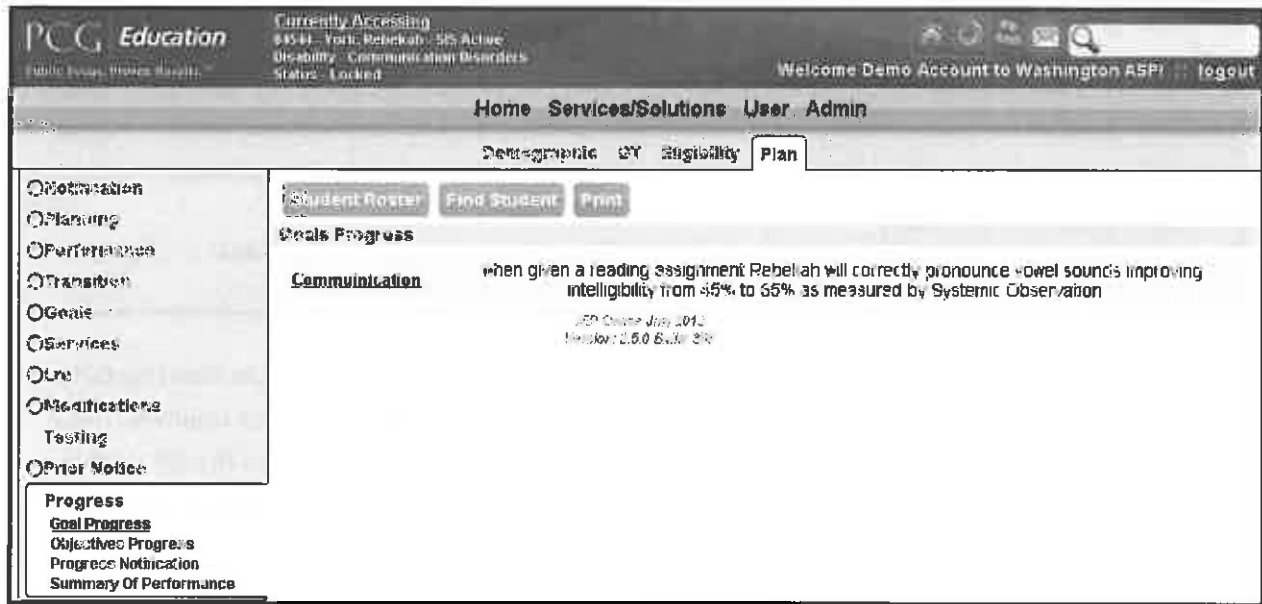
Locked IEP



- Once the record is locked, you will see a locked padlock icon right next to the Meeting Date of the record. Additionally dates will appear in the *IEP Mtg Due* and *IEP Expires* columns. These dates are based on the IEP meeting date entered in the *Notification* tab and the IEP start and end dates entered in the *Planning* tab.
- To print out a locked IEP, you need to click on the paper icon on the right of the screen as shown by the arrow above.
- Once you click on it, the *Attachments/Locked Documents* pop up window will appear.
- Each time the record is locked a PDF version of the document is saved. Click on the record with the *most recent* time and date stamp to generate the latest version of the record

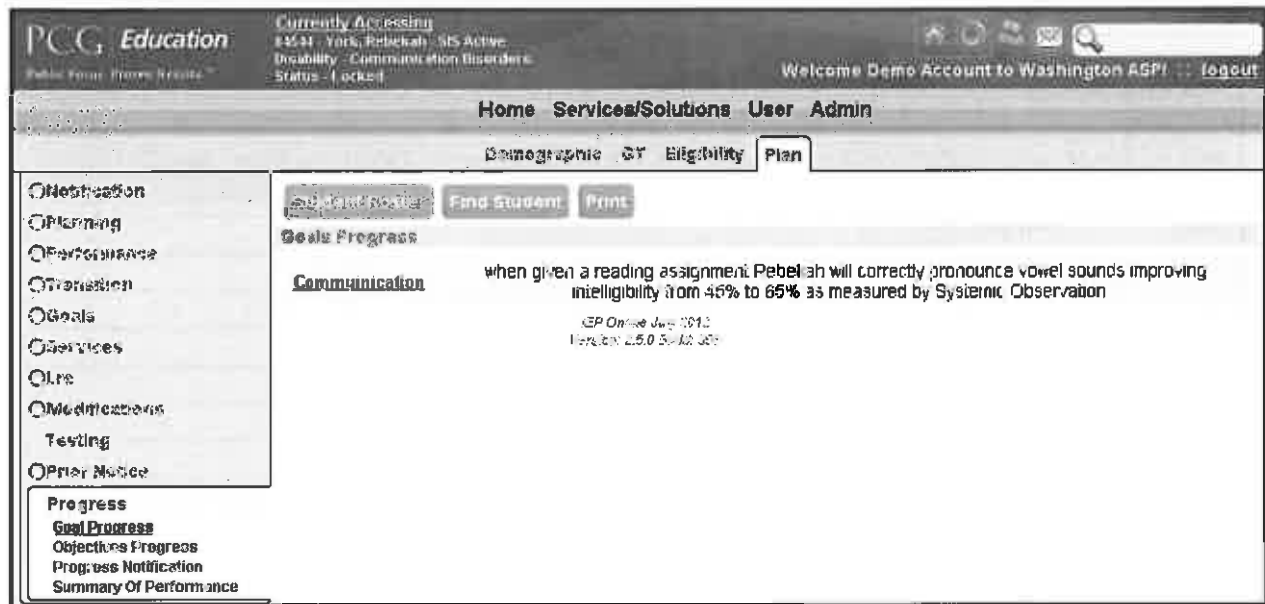


Locked IEP/Progress



- Progress may be tracked only after the IEP is locked. Click on the locked IEP and it will take you directly to the *progress/Goal Progress* subsection tab as shown above.
- You will see the record status as locked at the top of the screen.

IEP/Progress/Goal Progress



- The student example above has one goal: Communication.
- To access the goal, click on the goal type (in the screenshot above this would 'Communication')

IEP/Progress/Goal Progress/Goal Progress Reporting

Goal Progress	
Title <input type="text" value="Communication"/>	
Description	
<input type="text" value="When given a reading assignment Rebekah will correctly pronounce vowel sounds improving intelligibility from 45% to 65% as measured by Systemic Observation"/>	
Date <input type="text"/>	Progress <input type="text"/>
Date <input type="text"/>	Progress <input type="text"/>
Date <input type="text"/>	Progress <input type="text"/>
Date <input type="text"/>	Progress <input type="text"/>
Date <input type="text"/>	Progress <input type="text"/>
Date <input type="text"/>	Progress <input type="text"/>
Date <input type="text"/>	Progress <input type="text"/>
Date <input type="text"/>	Progress <input type="text"/>
Comments	
<input type="text"/>	
<input type="button" value="Save"/> <input type="button" value="Action"/>	

- Enter the date of your progress report, on the left and choose a *Progress* update from the drop down. The dropdown options are set by your district in Admin Online.
- Each row represents a marking period interval for progress reports. You may not need all of the rows. Progress from past progress reporting is saved here for easy reference in the future.
- The *Comments* section at the bottom is for further comments to the parents on the student's progression.
- If your student has more than one goal, the arrows in the bottom left will activate, allowing you to toggle between the goals. Once you are at the end of the goals, click on *save* to leave the screen and move on to *Objectives Progress* monitoring, if applicable.

Note: There is a quick way to update all students' goal progress on your caseload at once. For more details, see the section called *Quick Entry*.

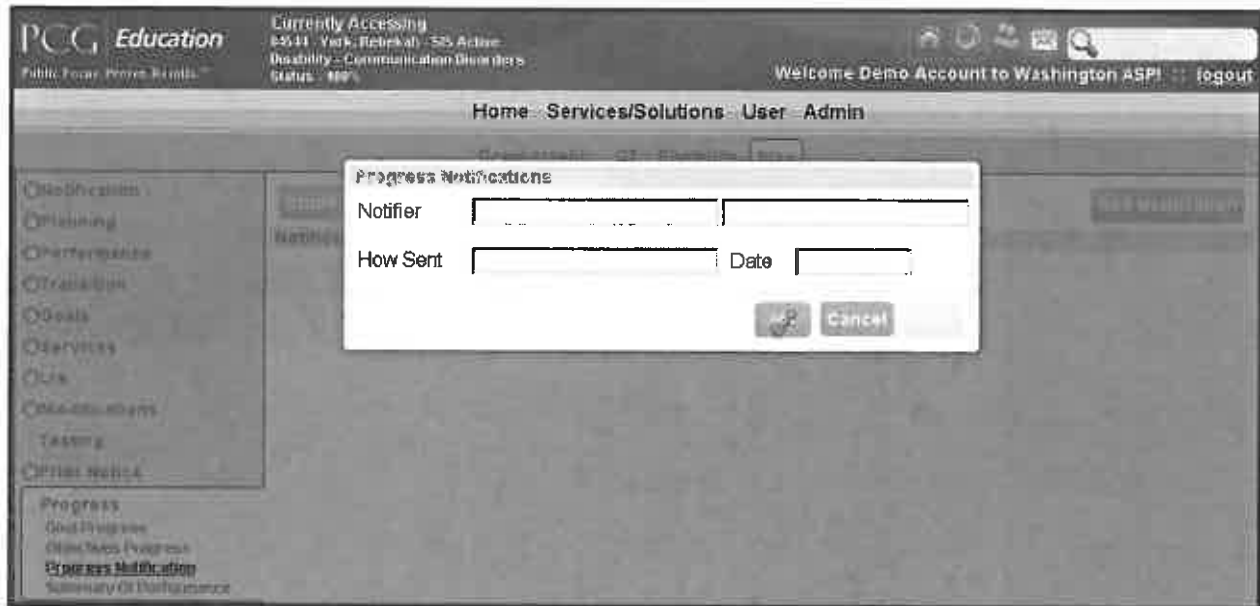
IEP/Progress/Objective Progress Reporting

The screenshot shows the IEP Online interface. At the top, it says 'PCG Education' and 'Currently Accessing: 84544 Yara, Rebekah - SIS Active'. Below that, it says 'Disability: Communication Disorders' and 'Status: Locked'. There's a navigation bar with 'Home Services/Solutions User Admin' and tabs for 'Demographic', 'GT', 'Eligibility', and 'Plan'. The 'Plan' tab is active. On the left, there's a sidebar with a tree view: 'Objectives', 'Planning', 'Performance', 'Transition', 'Goals', 'Observes', 'Lrs', 'Modifications', 'Testing', 'Prior Notice', 'Progress', 'Goal Progress', 'Objective Progress', 'Progress Notification', and 'Summary Of Performance'. The main content area shows 'Objectives' with a description: 'Communication when given a reading assignment Rebekah will correctly pronounce vowel sounds improving intelligibility from 45% to 55% as measured by Systemic Observation'. To the right of the objective, it says 'Articulation - Vowel Sounds' and 'Test Objective'. At the bottom of the objective, it says 'IEP Online July 2013' and 'Version: 2.0.0 Build: 316'.

- If your student has objectives in the IEP, then you will need to update the progress on each objective based on the determined frequency.
- To access the objective progress reporting, click on *Objective Progress*, located right below *Goal Progress*.
- Click on the objectives to the right to type in the progress information.
- Below is an example of what the objective progress will look like. The goal will appear at the top and the objective will be tied to the respective goal. Enter *Comments* for each objective in the box provided. Once you click *save* IEP Online will date stamp the print and screen versions.
- Hit *print* to preview and/or print Goals and Objectives Progress Reports to give to parents.

The screenshot shows the 'Objective Progress' form. At the top, it says 'Objective Progress' and 'when given a reading assignment Rebekah will correctly pronounce vowel sounds improving intelligibility from 45% to 65% as measured by Systemic Observation'. Below that, there's a 'Title' field with 'Articulation - Vowel Sounds'. Underneath is a 'Description' field. Below that is a 'Test Objective' field. Then there's a 'Date' field. Below that is a 'Comments' field. At the bottom, there's a 'Mastery Criteria' field with 'Correct Pronunciation'. At the bottom right, there are 'Save' and 'Cancel' buttons.

IEP/Progress/Progress Notification



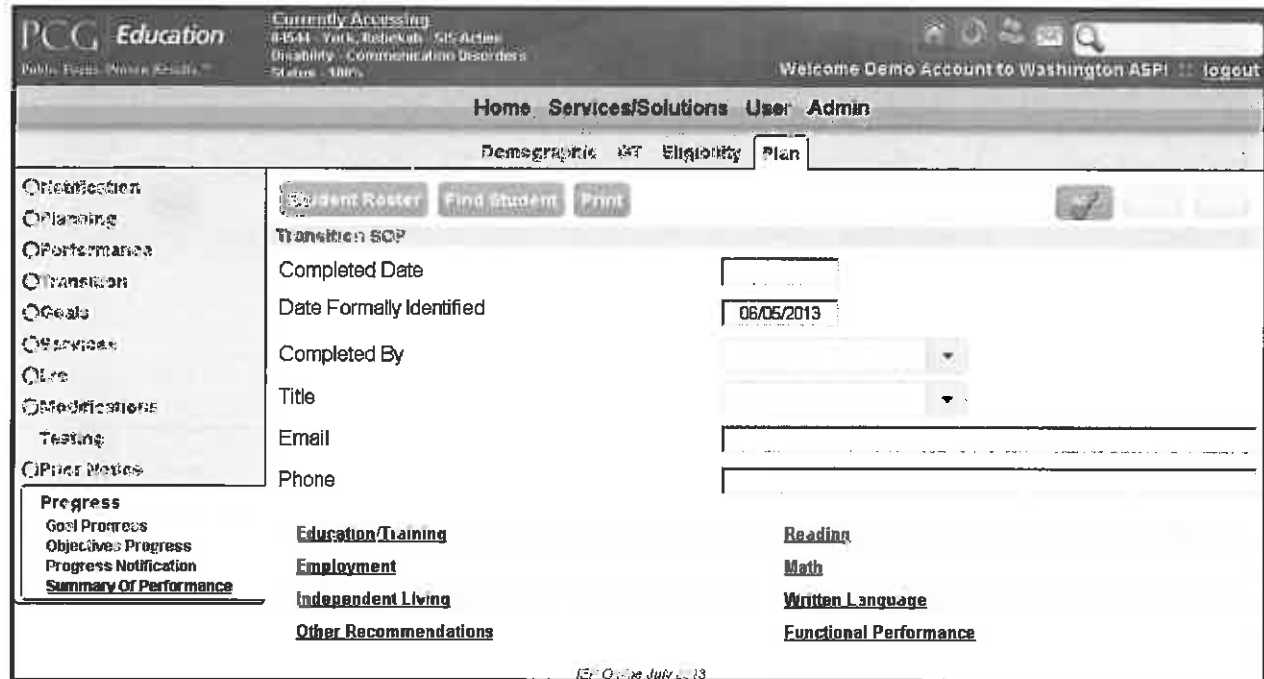
- The next area in the progress tab is *Progress Notification*.
- This is where you can document when and how you sent the progress notes home to the parents.
- Click on *add notification* and fill in your name as the *Notifier*, the method of how the progress notes are going to be sent and date you are sending them. Once completed, hit *save*.

IEP/Progress/Summary of Performance

The screenshot displays the 'IEP/Progress/Summary of Performance' web application. At the top, it shows the PCG Education logo and user information: 'Currently Accessing: 84544 - 7003, Bickel, SIS Active, Disability - Communication Disorders, Status - 100%'. A navigation bar includes 'Home', 'Services/Solutions', 'User', and 'Admin'. Below this is a sub-menu with 'Demographic', 'GT', 'Eligibility', and 'Plan'. The left sidebar contains a list of menu items: 'Education', 'Planning', 'Performance', 'Transition', 'Goals', 'Services', 'Life', 'Modifications', 'Testing', 'Prior Notice', 'Progress', 'Goal Progress', 'Objectives Progress', 'Progress Notification', and 'Summary Of Performance'. The main content area is titled 'Transition: SGP' and contains a form with the following fields: 'Completed Date' (empty), 'Date Formally Identified' (06/05/2013), 'Completed By' (dropdown menu), 'Title' (dropdown menu), 'Email' (text input), and 'Phone' (text input). Below the form are several sections with underlined text: 'Education/Training', 'Employment', 'Independent Living', 'Other Recommendations', 'Reading', 'Math', 'Written Language', and 'Functional Performance'. At the bottom of the page, it says 'IEP Online July 2013'.

- The Summary of Performance is for students graduating or aging out of the program.
- In the above screen, fill in the Completed Date for the summary, select the name of the person who completed it, their title, email address and phone number.

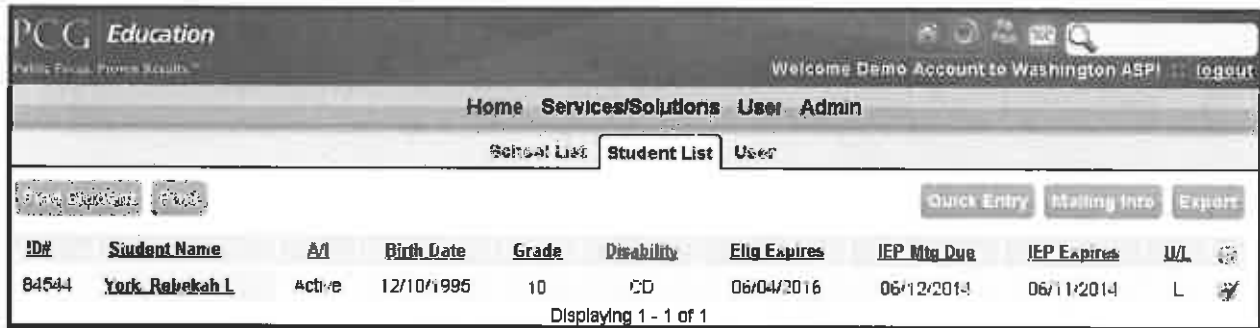
IEP/Progress/Summary of Performance Details



- The Summary of Performance is broken up into eight sections. Fill in updated information of the student’s current performance in the following areas: *Education/Training, Employment, Independent Living, Other Recommendations, Reading, Writing, Math, and Functional Performance.*
- When complete, hit *print* to print out the *Summary of Performance.*

Student Roster

Student Roster/Quick Entry



- From the *student roster* screen or *Student List* screen check the box on the far right side of the student name, to the right of the U/L column.
- After checking the box, hit the *quick entry* button, in the bottom right corner.

Note: You can enter goal and objective progress from the student roster screen for all locked IEPs, which have goals (exception is the Transfer IEP).

Note: You may do quick entry on multiple students from your caseload at once. Make sure to check all of the boxes on the right for students that you want to write progress report on.

Student Roster/Quick Entry/Goal or Objective Progress



- Select goal or objective progress as shown above.
- Enter progress for each goal listed in IEP. If you wish to do the objective progress after completing the goal progress reports, you will need to select *quick entry* again to do the objectives progress report.
- To print out the progress reports, select students and then hit *print*.
- All of the progress information added via *quick entry* will be viewable in the IEP as well as on the progress tab.

Transfer IEP