EDPlan 504

User Manual

Updated July 2019

TABLE OF CONTENTS

EDPlan 504 General Information

Security:

All information entered into the PCG 504Plan™ system is confidential. The server uses Secure Socket Layer (SSL) technology to encrypt all information as it flows across the Internet. This is the same technology that online merchants and banks use to protect credit card numbers and other sensitive information.

Please adhere to the following procedures to ensure security:

- **Do not give your account name or password to anyone.**
- **Do not write your password down where it can be seen by others.**
- **Do not save documents or reports to an unsecured computer.**
- **Always log off and close your browser when you are finished.**

Note: *The system will automatically log you out after a period of inactivity. Be sure to save information frequently.*

Navigation:

PCG 504Plan is menu bar driven with tabs along the top of the screen used to navigate through the system. Clicking the different tabs moves the user to different pages. Users will primarily use the Students tab to access and enter information with a student's record.

Saving Changes:

After a change is made it is very important to click the 'Save and Continue' button at the bottom of each screen to save the changes. Users may also see an option to 'Update the Database', and this is also a save function. **Any information entered will be lost if the User forgets to click 'Save,' 'Save and Continue,' or 'Update the Database**.'

Important Symbols:

	**Help Icon:** You can click on these to get more information about a particular field.
	**Radio Buttons:** When you see these there are often several answers linked together in such a way that only one can be selected. A radio button cannot be de-selected once chosen.
	**Check Boxes:** These will allow you to select multiple answers for one question, or occasionally may indicate the completion of a task.
	**Spell Check Icon:** When filling out a text field, this icon will be placed in the bottom right corner. Once you have finished filling out the field, you can click this button and it will check the field for spelling errors.
	**Calendar Button:** It is most frequently placed next to date fields. Clicking this button will open a calendar. When placed next to a date field, the user can select a date in the calendar, and that date will automatically fill in the date field in the proper format.
	**Incomplete/Noncompliant 'X':** If a page is missing required information, this red 'X' will appear next to the page name. In addition, an error message explaining what information is needed will display at the top of the page when a user attempts to save and continue.
	**Asterisk:** Indicates a required field.

Logging into the System:

1) Open a web browser and log into the NCEdCloud website.
2) Click on the "ECATS" icon for your district
3) Enter your username: (First Name <space> Last Name)
4) Enter your password.
5) Click the 'Login' button.

***Note**: Your username **is not** case sensitive. Your password **is** case sensitive.*

***Note**: PCG 504Plan is a web-based system. You can gain access using your name and password through any Internet service provider on any computer with Internet access.*

Changing Your Password:

1) The first time you log in, please click on the "My Info" tab.
2) Type your current password first, and at the top of the page.
3) Enter and confirm your new password (must be at least 1 capital letter, 1 lower case, 1 special character, 1 number, and a minimum of 8 characters long).
4) Update your personal information including your password, title, work phone and email address. ***Note****: This information is important for communication via the Message Board.*

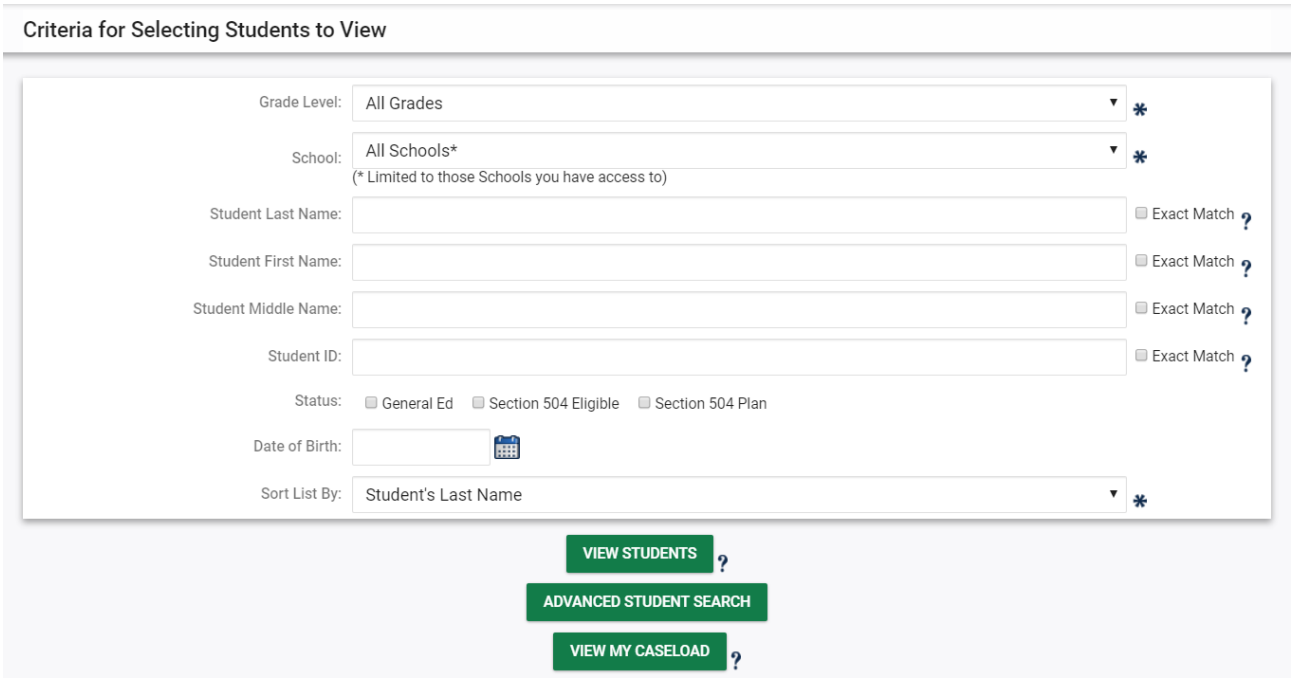
Note: *For security purposes, when updating your personal information, please change your password.*

Navigating to the Section 504 Process

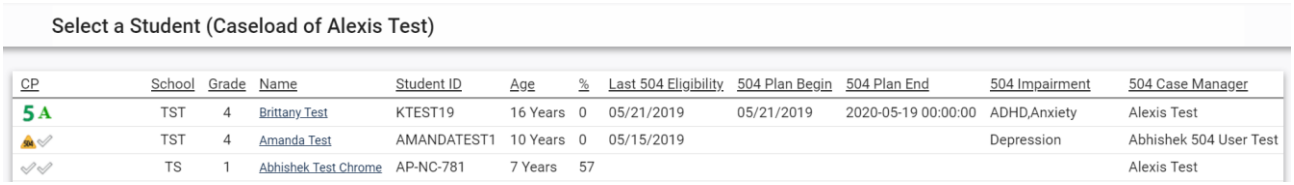
Once you have logged in, you will be sent to the Main Menu screen. Remember that the system is student-centric, so every data entry process you will perform on the site will always start with the student. To navigate to the Section 504 Process, follow these steps:

1) Click on the 'Students' Tab

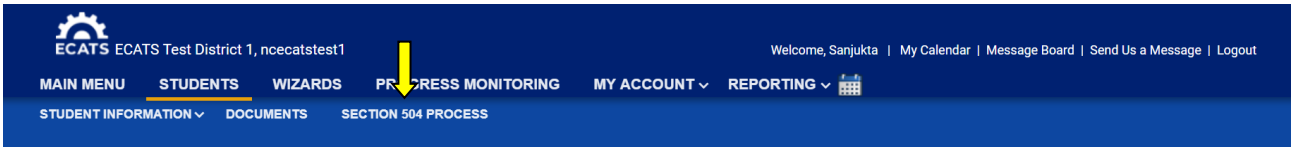
2) Fill out the search criteria for the student you are going to be working with, then click 'View Students'.



3) The “Select a Student” page will then open containing a list of students who meet your search criteria. If your search criteria does not fit any of the students in our database you will receive an error message. Simply go back to the student search page and broaden your criteria. Once you are looking at the “Select a Student” list, simply click on the student’s name to access their information.



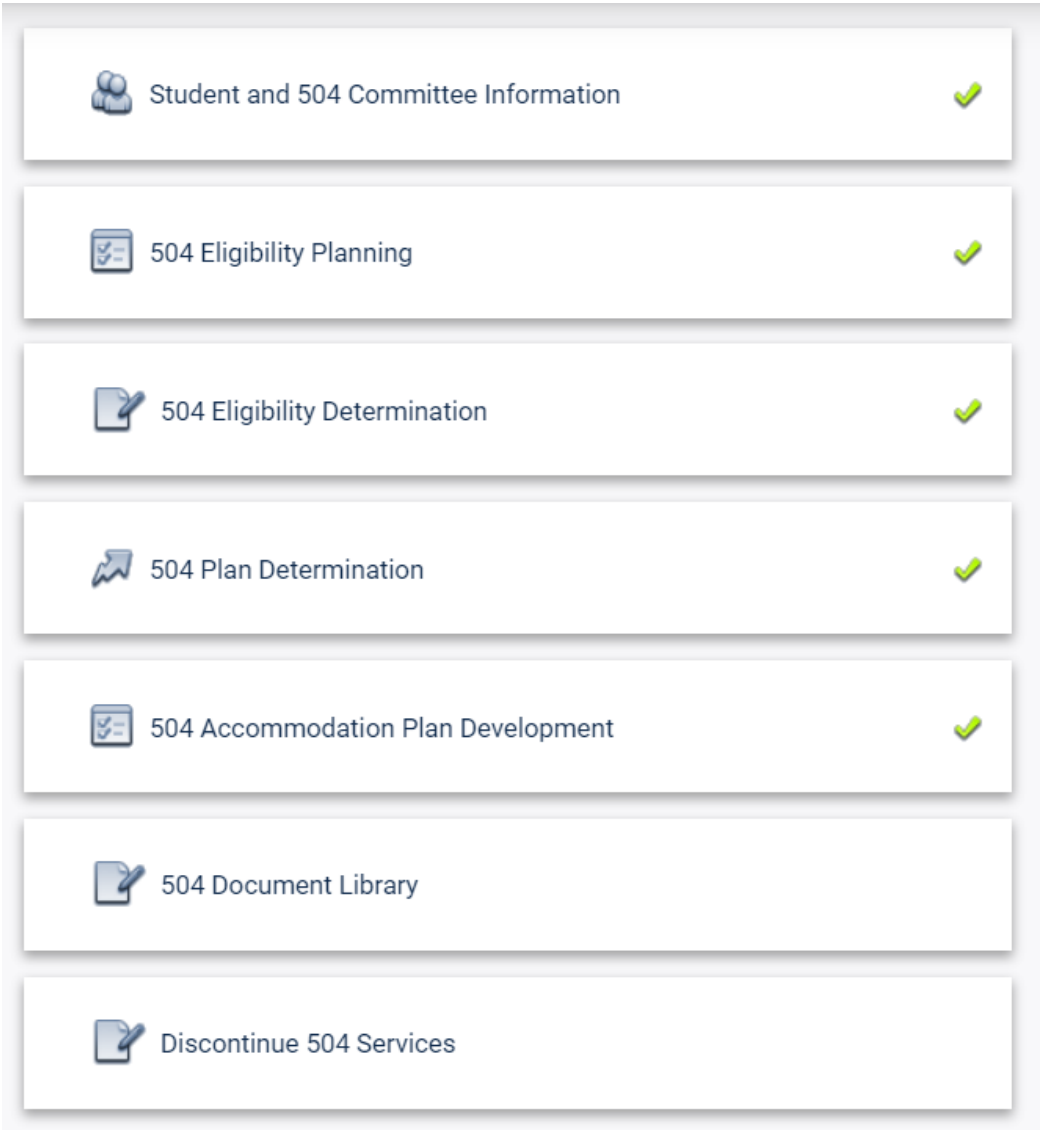
4) Notice that the top navigation bar has changed. You may now access the selected student’s information. Use the scroll bar to navigate to the right until you find their ‘Section 504 Process’ tab. Click on it to open the process.



5) This will open the following page. You will now be able to create or update the student’s 504 plan. We at PCG like to refer to our process as the TurboTax of 504 documentation. The steps are set up to be followed in order, and you will be notified as you go along if something is not quite right. Let’s begin.

Section 504 Process

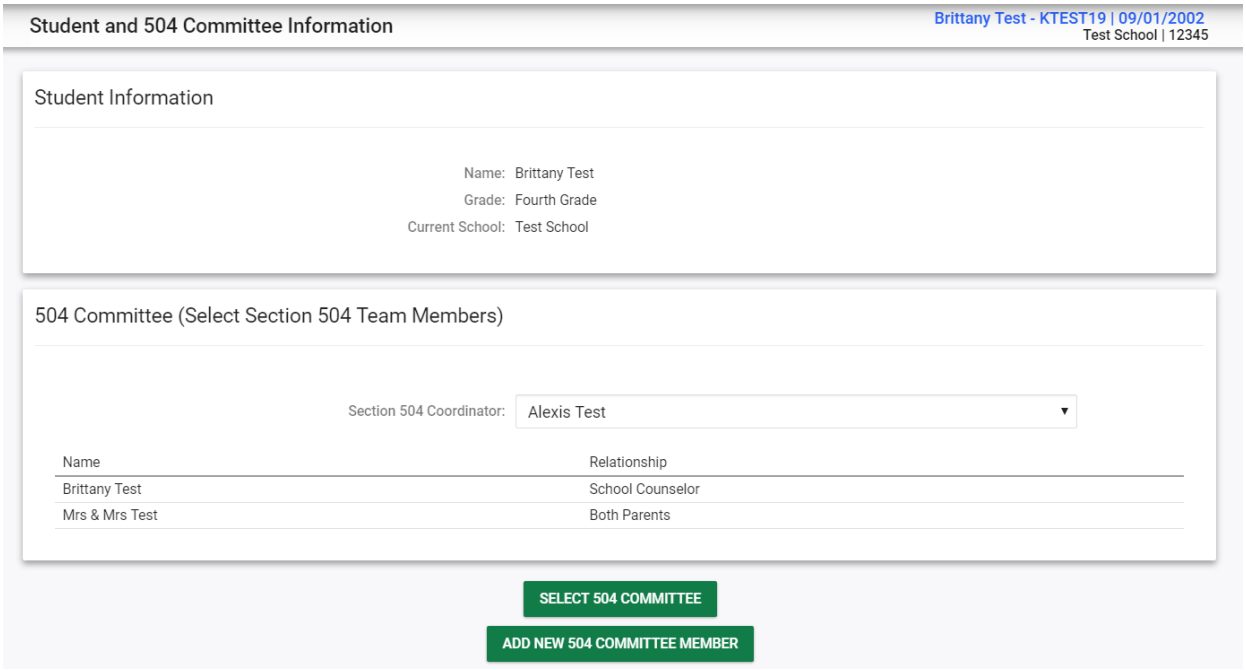
The Section 504 Process is comprised of steps. Once a step is fully completed, a green check mark will appear.



Student and 504 Committee Information

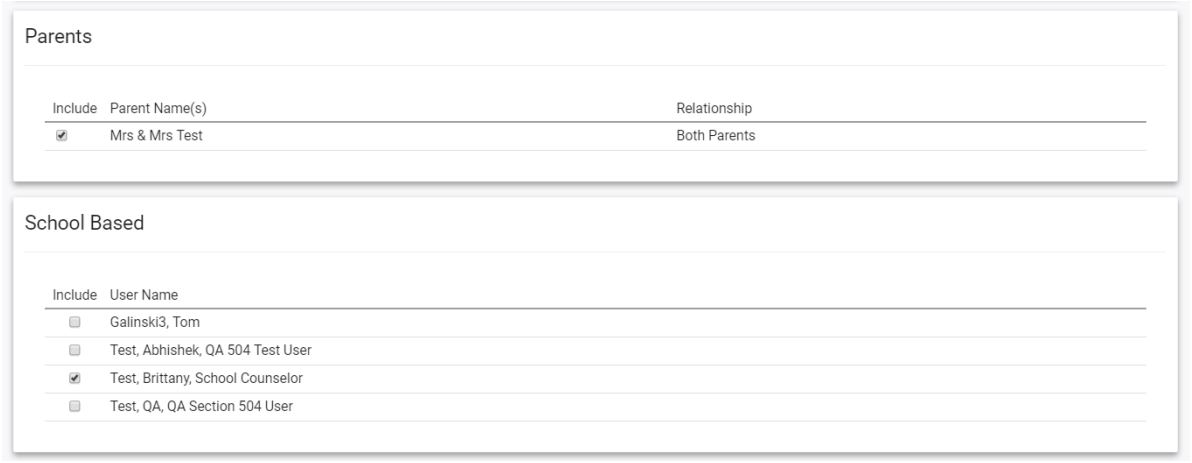
1) To start, click on ‘Student and 504 Committee Information’.

2) Make sure you review and/or select the ‘Section 504 Chairperson’ and the student’s 504 committee.



3) For the ‘Section 504 Chairperson’ (your site may say ‘Section 504 Coordinator’) click on the dropdown box. This will bring up a list of everyone eligible to serve in that position and you can choose the appropriate person for your student.

4) To update the rest of the 504 Committee, click on 'Select 504 Committee' below the list. It will open the following page.



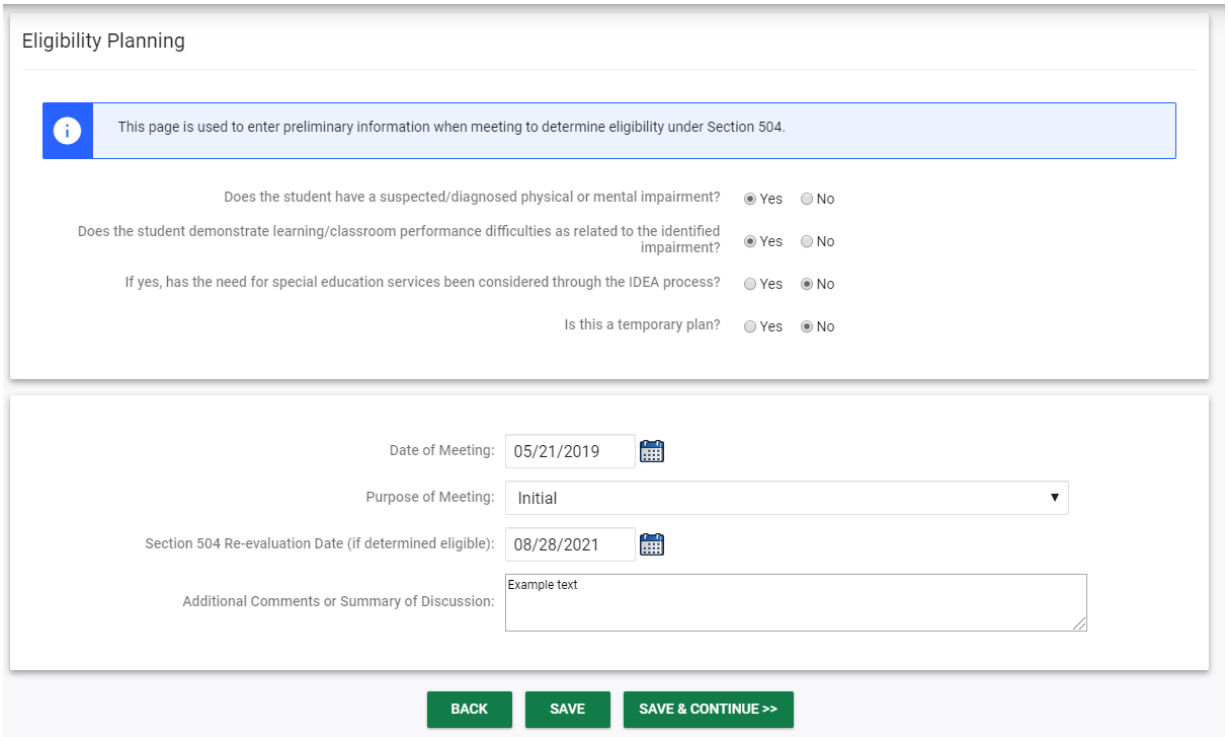
5) As you can see, there is a very comprehensive list of who can serve on a student's 504 committee. Simply click the check box beside the name of every person on your student's 504 committee, and then click 'Save and Continue' at the bottom of the page. ***Note****: If a student had a 504 plan from a previous school, you will also be able to view who was on their previous 504 committee on this page. This will automatically show up if it exists.*

6) You will be navigated back to the Information page and will see your updated list of 504 committee members. To add an external team member, meaning someone other than the parents who was not available on the previous page, select "Add New 504 Committee Member." This is where you may add participants who do not have access to the EdPlan system.

7) Once you are finished reviewing the information you have entered, click 'Save and Continue'.

504 Eligibility Planning

Welcome to the 504 Eligibility Planning page. This page is where information will be entered which may impact a) who needs to attend the meeting and b) whether any steps should be taken prior to the meeting occurring – i.e. such as gathering information related to any IDEA process, MTSS process, or other intervention steps which have already taken place for the student.



Specifically, on this page we will address:

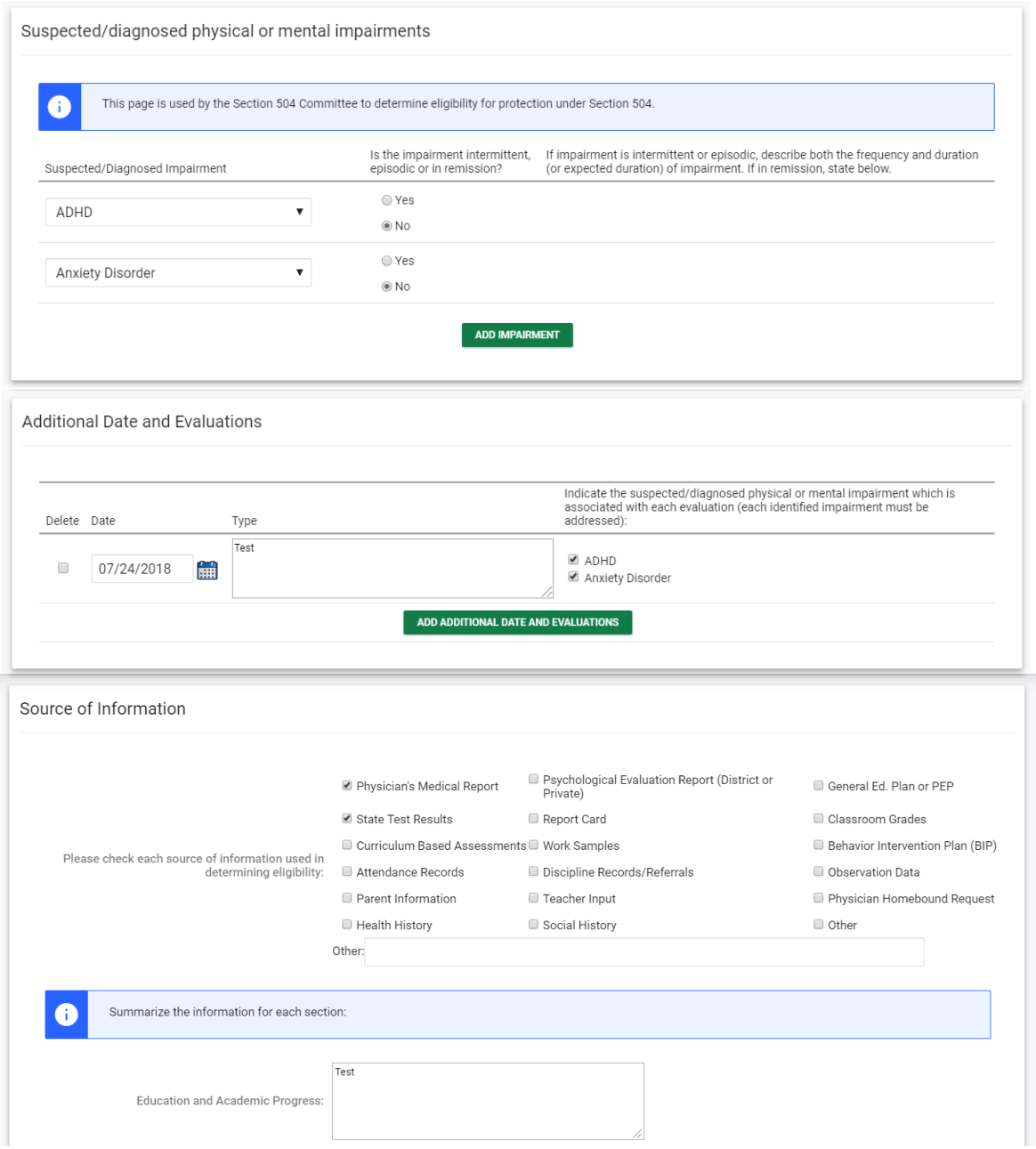
- Whether the student has been identified as having a suspected or diagnosed impairment. This may be a medical, mental or physical condition.
- Whether the impairment is impacting learning or classroom performance. This question is asked to determine whether there has been, or needs to be, any steps taken towards evaluating the need for specialized instruction (i.e. IEP or MTSS).
- Whether the plan is temporary. If so, then there is no need to postpone the meeting if the IDEA process has not yet been considered.

Once all questions are answered, then it is time to set the date and purpose of the meeting.

- The date will automatically populate to the current date, but may be modified
- The purpose will default to temporary/transitory if the question of temporary is answered 'Yes'
- Otherwise, users may choose from a dropdown of menu options, which will cause an automatic calculation of the reevaluation date.
- If the meeting purpose is an addendum, eligibility dates will not change, but will remain consistent with the previously finalized eligibility determination date.

504 Eligibility Determination Worksheet

Welcome to the 504 Eligibility Determination Worksheet page. Your screen should look similar to the one below, but the wording may vary. It is very important to be thorough on this page, because the system will use it to determine the child's eligibility. *Reminder: Our system does not check the content that you enter in text fields for accuracy or quality, but it will warn you if a mandatory field has been left blank. Also, be sure to use the spell check feature to check your work.*

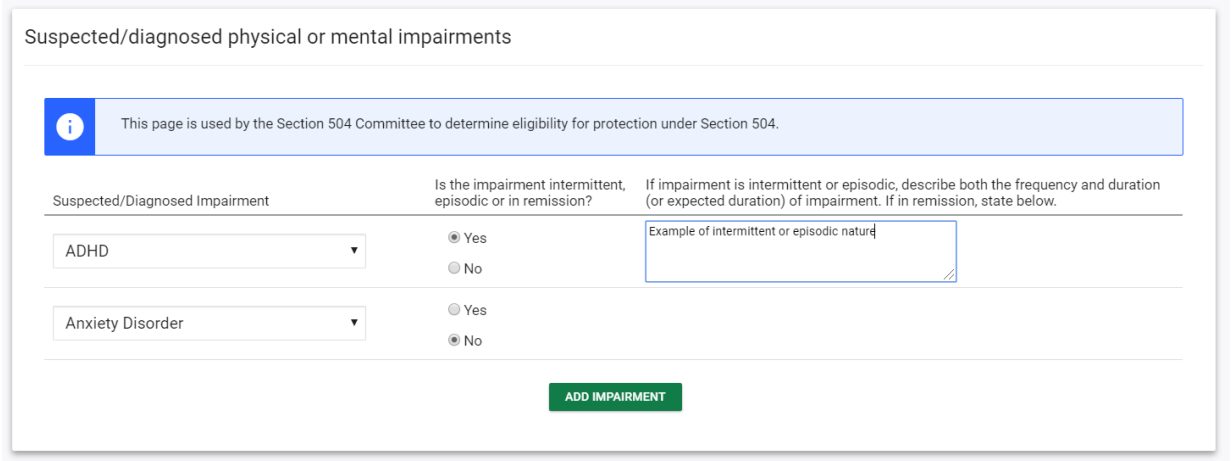


Consider the following guidelines when determining eligibility under Section 504:

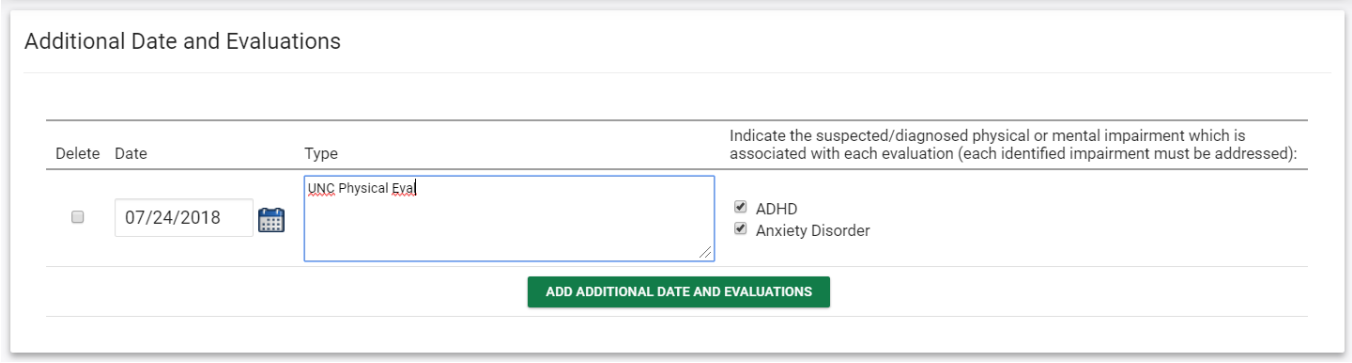
- A disability is a physical or mental impairment that **substantially limits** one or more major life activities.
- Examples of major life activities are seeing, hearing, breathing, walking, learning, communicating, thinking, concentrating, reading or the operation of a major bodily function/system, such as the digestive or immune system.
- The term "substantially limited" means an individual is restricted or "considerably" limited in performing a major life activity as compared to an average person in the general population.
- An impairment **may** be considered a disability even if it is controlled or managed with measures such as medication, medical devices or other modifications.
- An impairment **may** be considered a disability even if it is intermittent, episodic or in remission. The determining factor is whether, when the condition is active, it substantially limits a major life activity.
- A temporary impairment is generally **not** considered a disability unless it is a substantial impairment, taking into account both the expected duration (up to six month duration for a temporary impairment) *and* the degree to which it actually limits a major life activity.
- A student may qualify as disabled under Section 504 but due to the status of the student's disability (i.e., intermittent, in remission, controlled by medication, addressed through a health care plan), the student may not need a 504 Accommodation Plan at this time.
- When determining 504 eligibility, consider information from a variety of sources, e.g., health care plan, classroom performance, parent information, test results, evaluations, teacher reports

1) To begin, select a suspected or diagnosed medical condition, physical or mental impairment from the dropdown list provided. If your student has more than one, click 'Add Additional Impairments'. An additional dropdown box will appear. You will be able to add as many as 3, or up to 10 disorders and impairments (depending on the setting for your district).

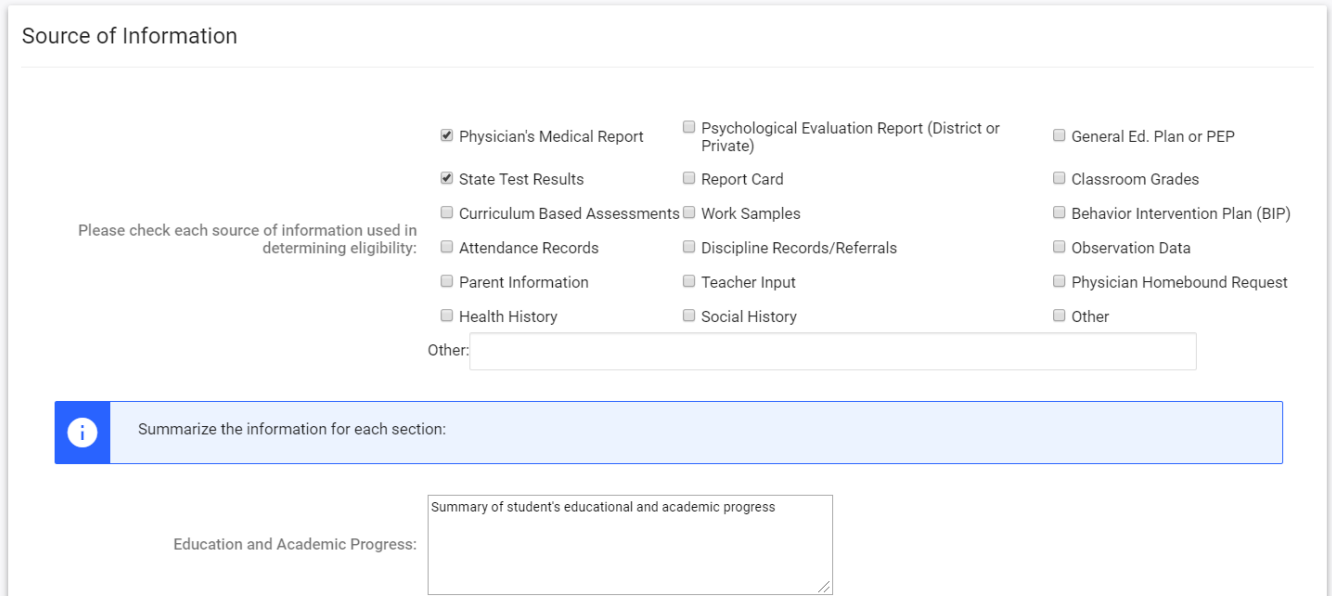
2) At this time, whether the impairment is intermittent, episodic or in remission will also be addressed.



3) Next, complete the 'most recent evaluation' field. If there are multiple relevant dates, you can add additional date and evaluations fields by clicking the blue button below the text box. You can add up to 10 of these.

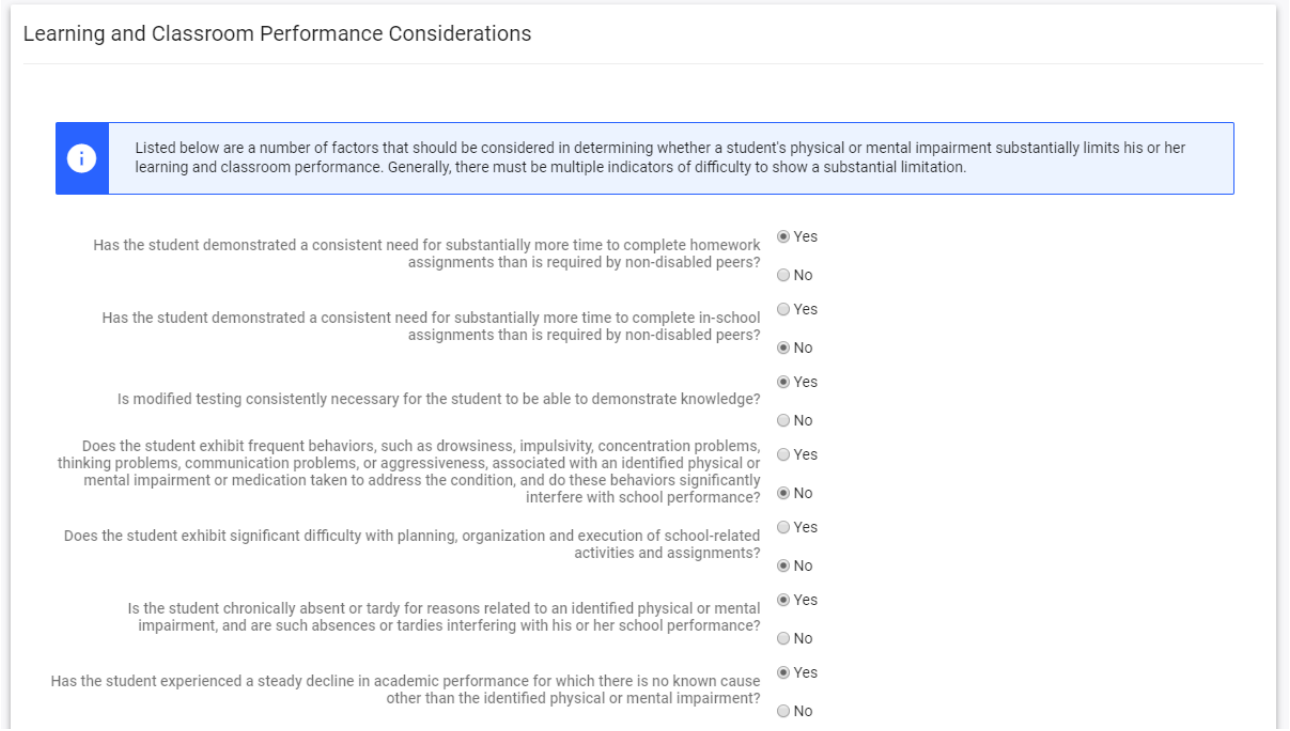


4) Using the checklist, indicate all sources of information used to determine eligibility. A **minimum of two** sources must be selected. Also, use the narrative text boxes to summarize the student's performance in each area. Text must be entered in each box.

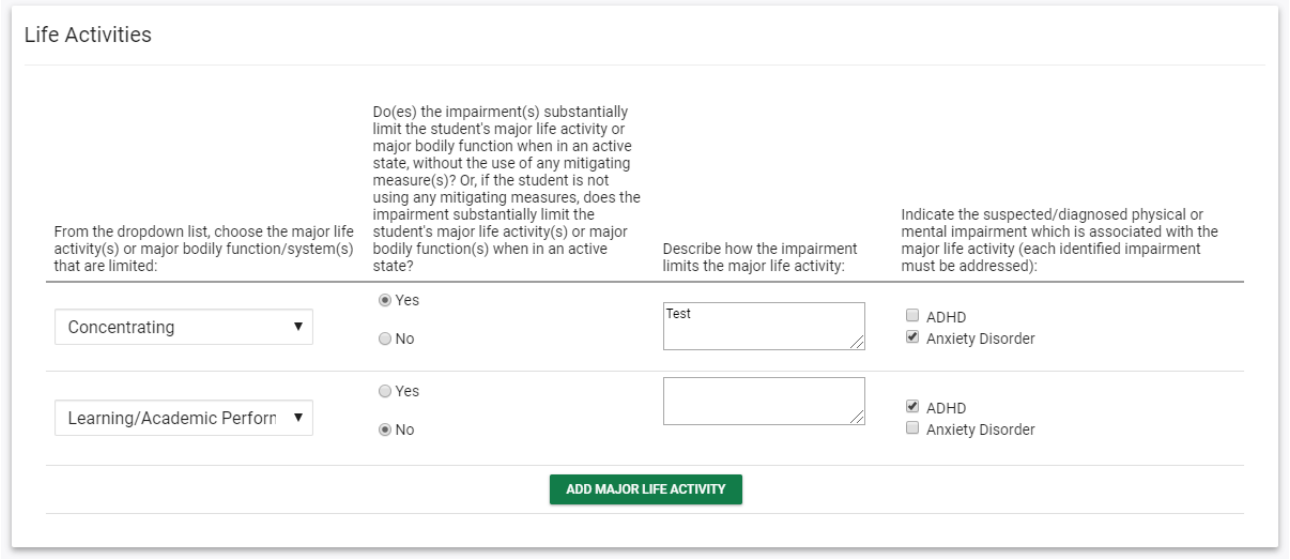


5) Continue down the worksheet. Notice that the way you answer the questions drives what is on the screen. For example, selecting 'Yes' on certain questions may cause another question to appear, or a text box requesting additional information to display. Be sure to enter comments in all text boxes that display or you may be unable to save and continue.

6) Indicating that a student's learning or classroom performance is impacted will result in a checklist of questions related to learning and classroom performance to appear. These questions do not impact eligibility determination, but drive conversation regarding the specific impact on learning.

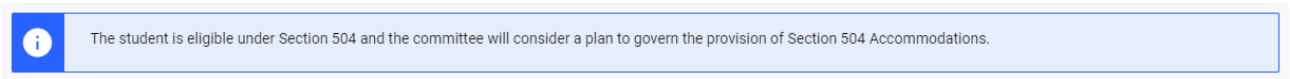


7) Please continue down the page, answering every question. Towards the end of the page, you will reach the following box:



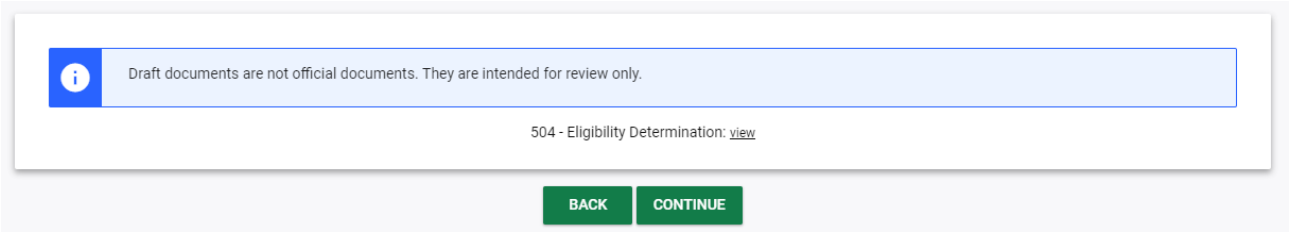
8) This is the final check for eligibility. You add an impacted major life activity by clicking 'Add Additional Life Activities'. Then click on the dropdown box off to the left to add the specific activity. You can add up to 10 of these fields.

9) *<u>Notice</u> the eligibility statement in blue below the box. This will state that your student is ineligible until you have at least one major life activity substantially impacted by an identified impairment. Once your student is eligible, you will see this message:*



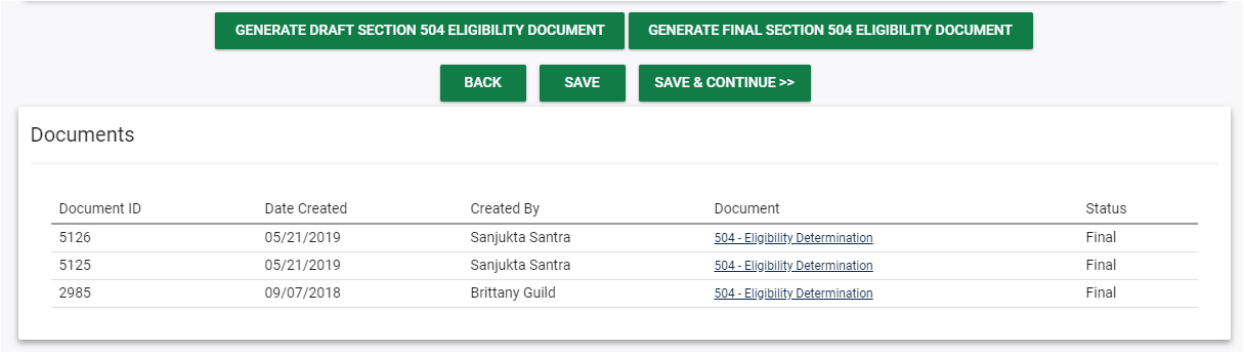
Generating a Draft and Final Eligibility Document:

10) Below the eligibility statement, you will have the option to create both a draft and a final 504 eligibility document. Any documents you create will show up in a table at the bottom of the page. Drafts will stay in the system for 30 days and can be generated even if there is some missing information. Finals require all necessary fields to be filled out and stay in the system permanently.
    a. To create a document, click on the 'Generate Draft (or Final) 504 Eligibility Document'. ***<u>Note</u>**: If you click 'Save and Continue', you will be navigated back to the main screen without generating a document.*



    b. The above screen should appear once your document is finished generating. You can open and review the document by clicking on the hyperlinked 'view the 504 – Eligibility Determination' name. To continue with the process, click 'Save and Continue'.

11) 'Save and Continue' will take you back to the main eligibility determination page. If you scroll down to the bottom you should see the document you have created.

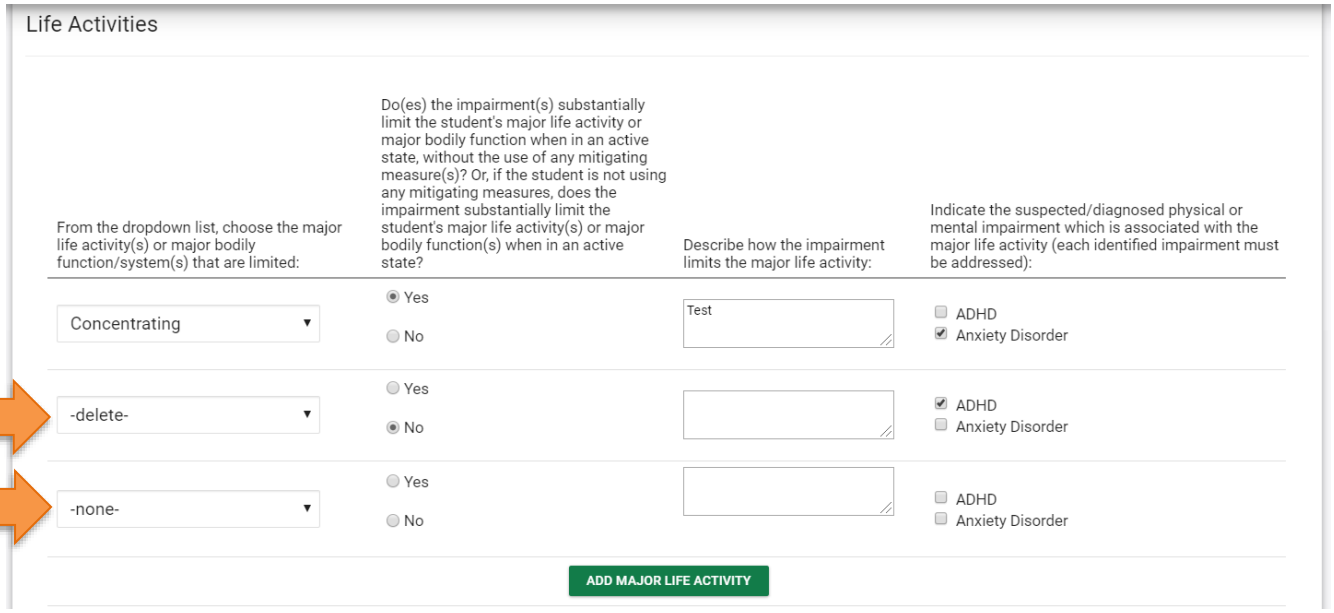


12) *<u>Notice</u>: Our system checks for compliance as you go along. To make sure the page you are working on is compliant, click 'Save'. If it is not you will receive a red message at the top of the page and a red 'X' beside the step tracker at the bottom. As you can see in the image above, I am currently in compliance for each step. If this is the student's first 504 Process in our system, the checks for each page will be clear until you complete that step of the process.*

13) When you have finished creating your documents, click 'Save and Continue' to proceed.

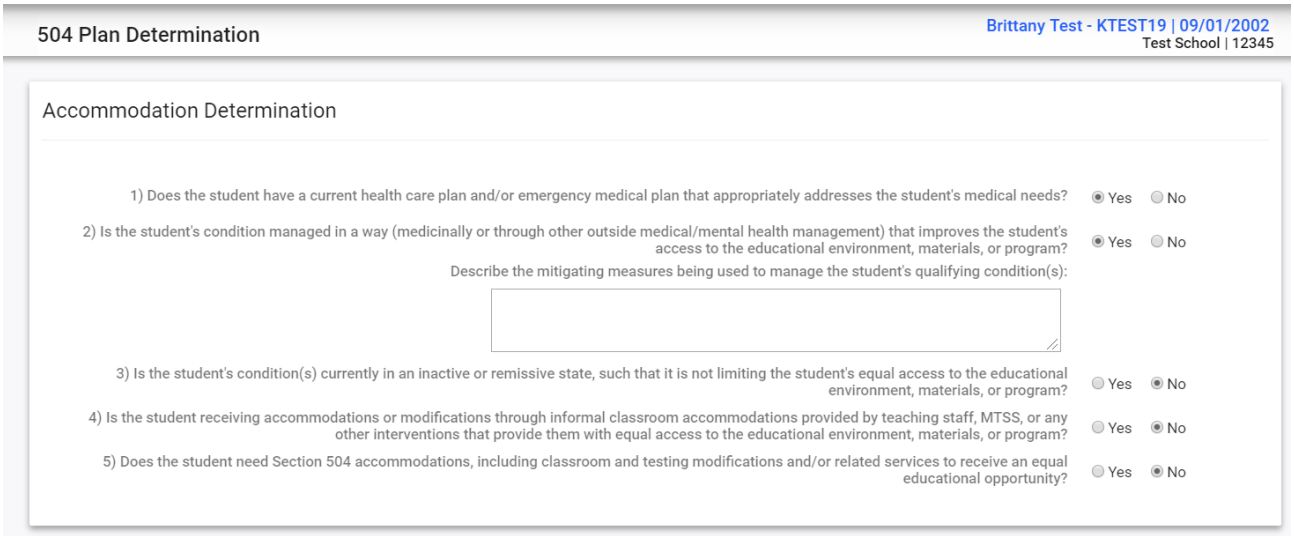
Removing a Major Life Activity from an Eligibility Determination Worksheet

To remove a major life activity from the worksheet, change the dropdown to '-none-' or '-delete-' and select 'Save.'

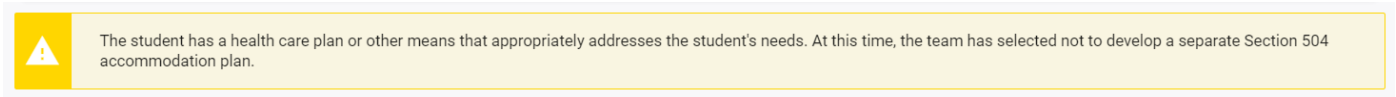


504 Plan Determination Worksheet

1) Welcome to the 504 Plan Determination Worksheet. This page is used to determine if a student is eligible for any accommodations. Review each statement and answer based on the student's needs.



2) If the committee decides to answer 'Yes' to question 1 and 'No' to statement 5, then a message will appear at the bottom of the page indicating that the student's needs are being met by a health care or emergency medical plan and an accommodation plan is not required. In this case, creating an accommodation plan is not required, and the process can end here. The message language may vary, but will be something similar to the image below. This statement will also print on the PDF.



3) If the answer to statement 5 is 'Yes,' regardless of how any other statement is answered, then it will be determined that accommodations are required, and you will continue to the 504 Accommodation Plan Development page.

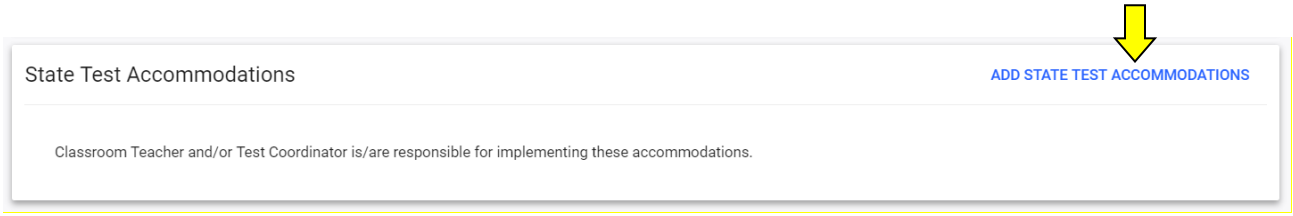
4) Once you have answered the 5 questions (don't forget to consider the check box below the table), click 'Save' to check for compliance or 'Save & Continue' to move forward.

504 Accommodation Plan Development

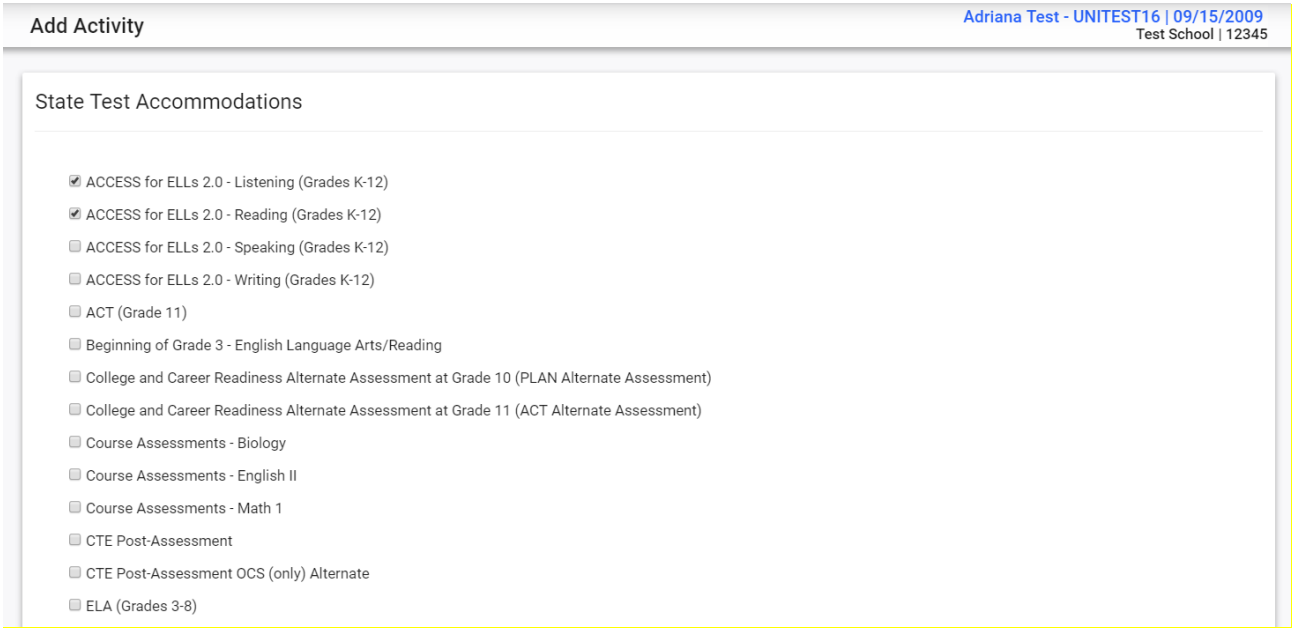
1) Welcome to the 504 Accommodation Plan Development page. Here we will develop the Accommodation Plan for your student.

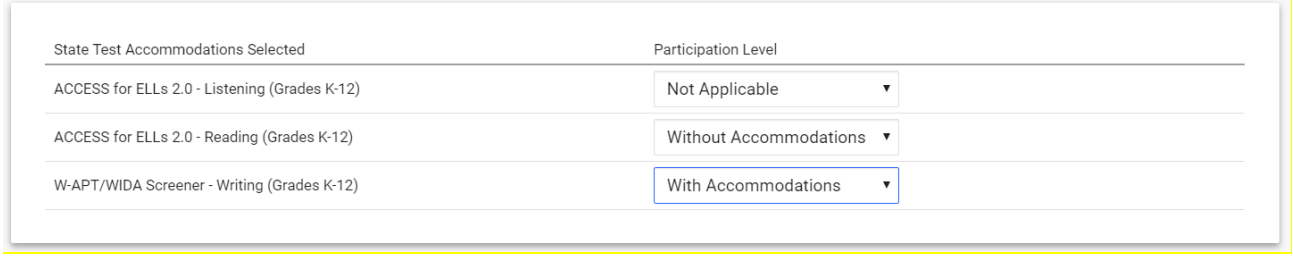
2) This page is broken down into 4 sections: General Accommodations, Classroom Test Accommodations, State Test Accommodations and District/Local Test Accommodations.

3) For each section, you can add accommodations for the appropriate test or activity. For example, clicking on the "Add State Test Accommodations" will lead you to a comprehensive list of state-mandated tests that a student may require an accommodation to take.



4) On the "Add Activity" page, you can select multiple tests at once by clicking the radio buttons next to the options. At the bottom of this page, you can indicate the student's Participation Level for the selected tests by clicking into the dropdown next to the test.

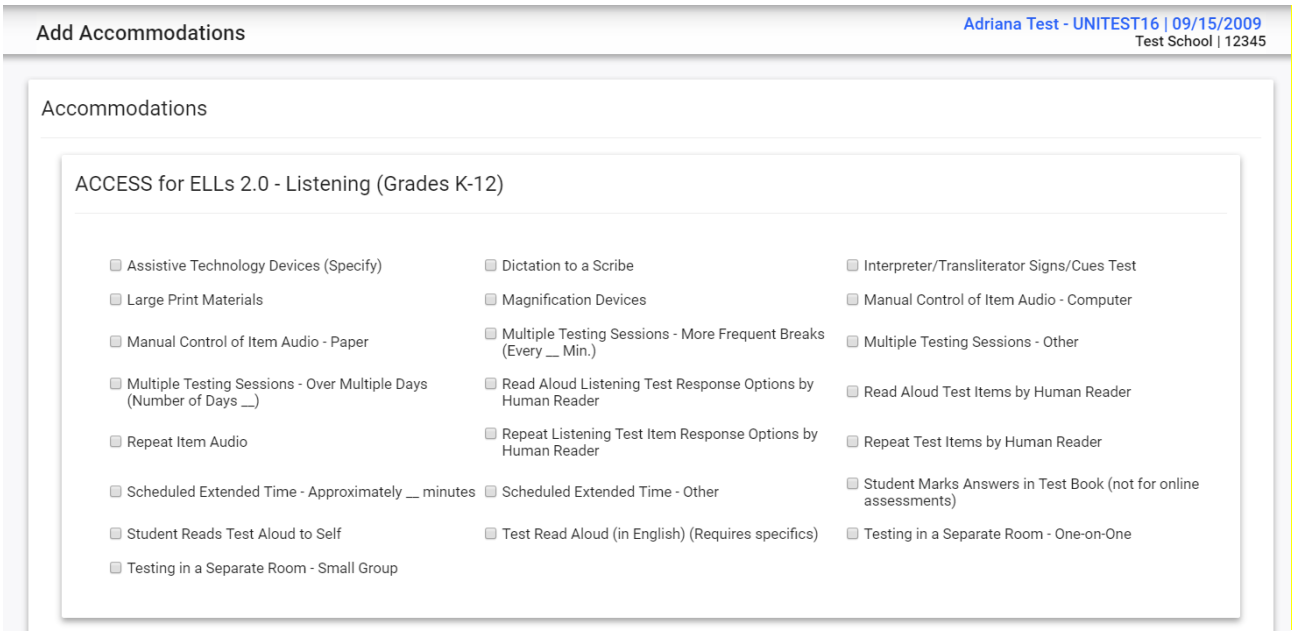




5) For any test that you select a participation level of 'With Accommodations', you must indicate what accommodations are required for that student on the next page. ***Note**: It is recommended to set the participation level for all tests **before** adding accommodations.*

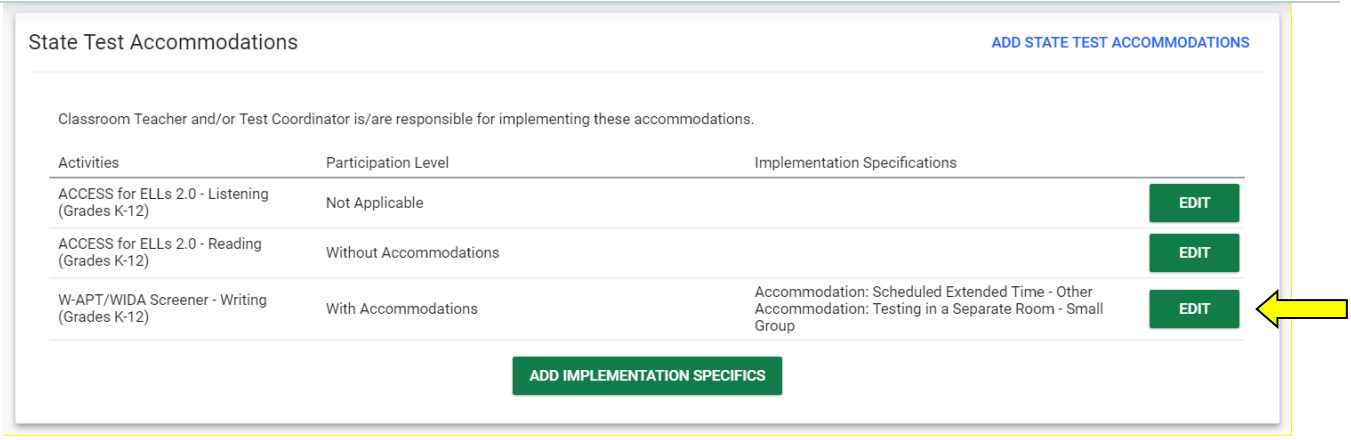
Adding Accommodations:

6) You should now be looking at a screen similar to the one below. Review the list and select all accommodations that apply to your student for that test.

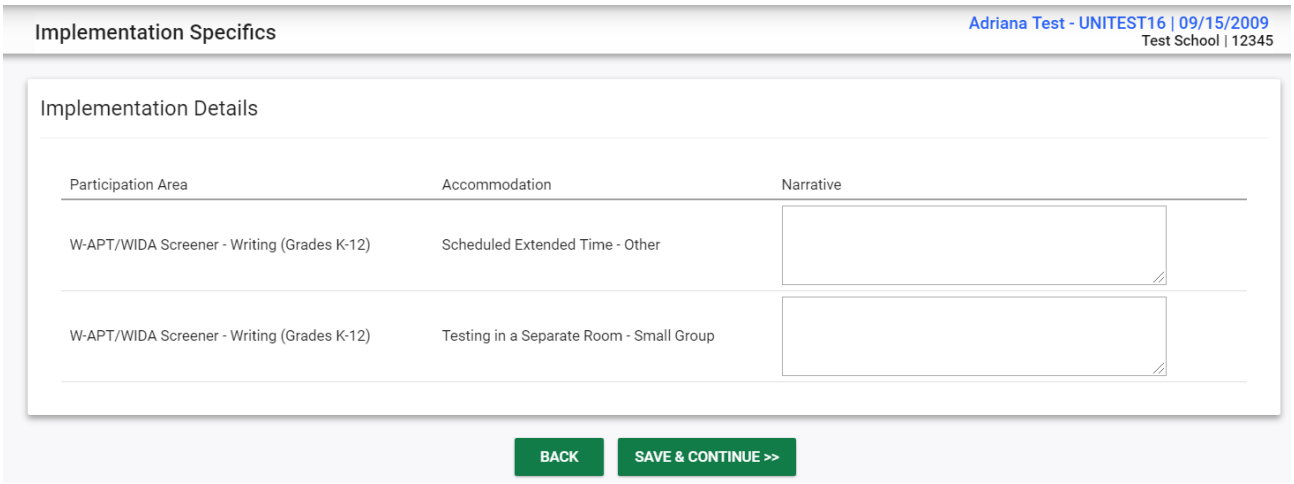


7) Once you have finished adding all the desired accommodations, click 'Save & Continue'.

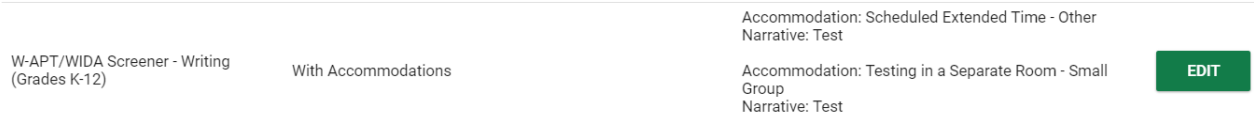
8) You should now be looking at a screen similar to the one below. If you accidentally chose an accommodation that you did not intend to, simply click the "Edit" button to return to the Add Accommodations page. Uncheck the accommodation you wish to remove and click 'Save & Continue'.



9) To add implementation specifics to accommodations (certain accommodations will require them), click on the “Add Implementation Specifics” button. This will lead you to the page below where you can add specifics into the narrative box.



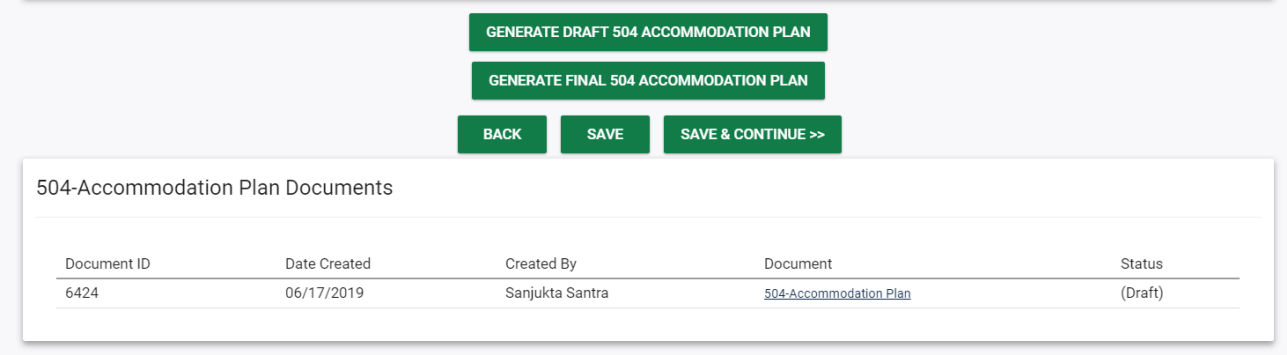
10) Click ‘Save & Continue’. The implementation specifics will appear under its accommodation.



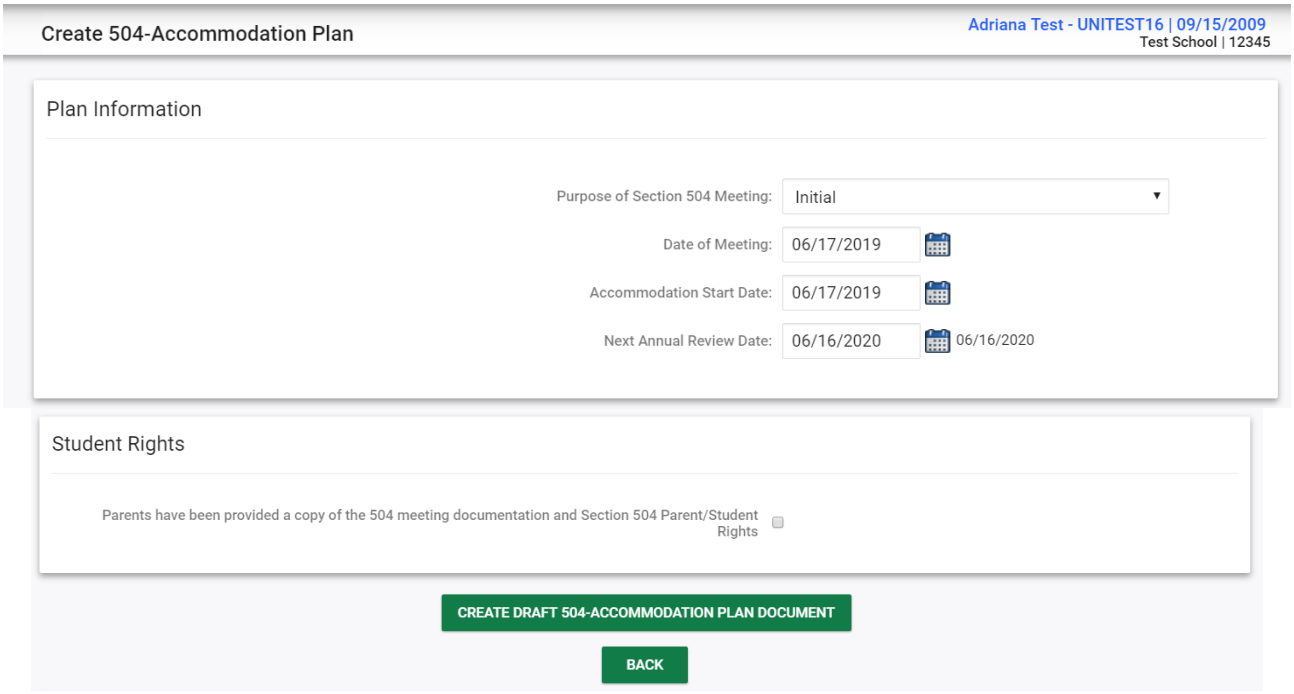
11) The remaining sections (General Accommodations, Classroom Test Accommodations, and District/Local Test Accommodations) follow a similar procedure, and, when applicable/available, a standard checklist of accommodations will exist. If there is not a checklist, you will have the ability to add a custom accommodation.

Creating a Draft/Final Accommodations Plan Document:

12) Generating documents here works the same way as the Eligibility Determination Worksheet. To start, click 'Generate Draft (or Final) 504 Accommodation Plan'.

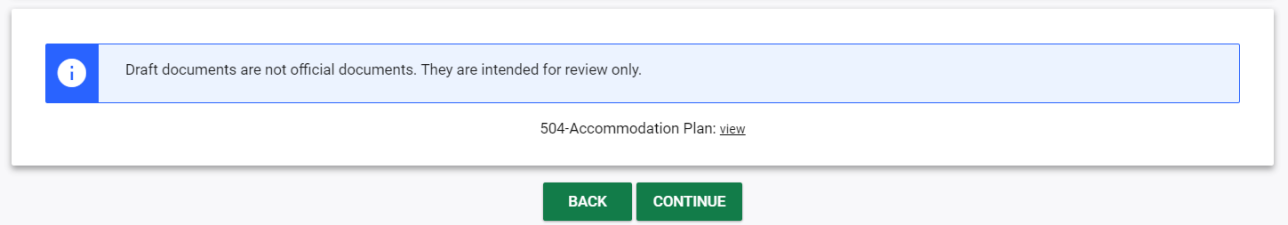


13) Next, enter the meeting purpose and dates. The annual review date should be no more than 365 days from the date of meeting. The date fields should change depending on the purpose of the meeting you select from the dropdown list, but always review for correctness.



14) Once everything has been filled out, click 'Create Draft 504 – Accommodation Plan Document' to generate your document.

15) You should see a screen similar to the one below. To view your created document, click the hyperlink 'view'. To move forward in the process, click 'Save and Continue'.

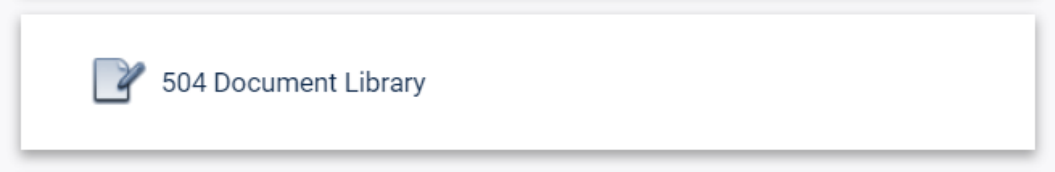


16) At the bottom of the page you should see your newly created document. Again, if you created a Draft document it will be available for 30 days. If you created a Final document it will be there permanently.

17) You will not be able to create a Final document unless all errors have been fixed. Once you create your Final document, click on 'Save & Continue' to return to the main Section 504 Process page.

504 Document Library

1) Welcome to the 504 Document Library. From this page you can view any documents you created via the Section 504 Process.



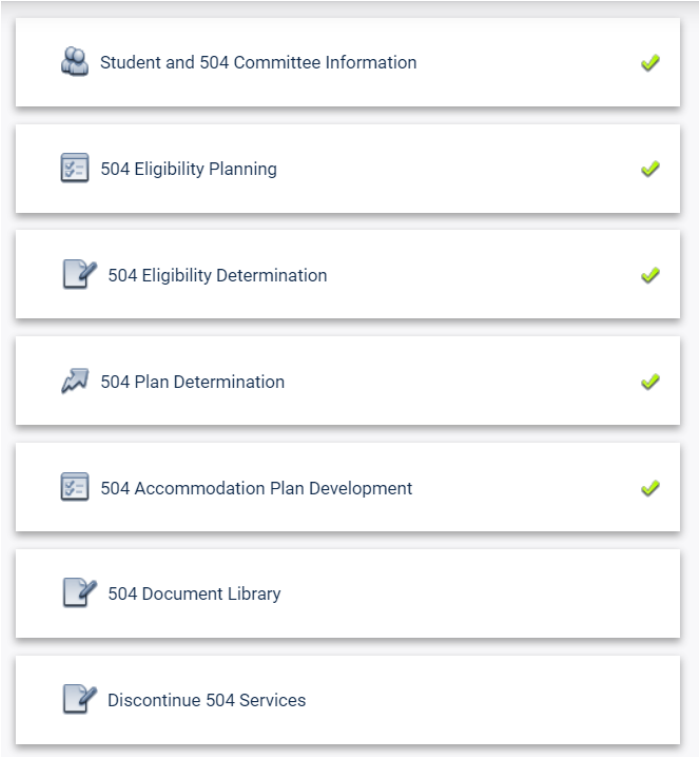
2) Same rules apply for Draft and Final documents. The draft will be available for 30 days while the final document is permanent. You can always create a new final or draft, but we keep copies of every final you create for our records. In addition, you will not be able to create a final document if you are missing required information.

Congratulations! You have completed the Section 504 Process. Please continue below to learn how to discontinue services for a student and additional information on creating invitations, other 504 documents, and building your student caseload.

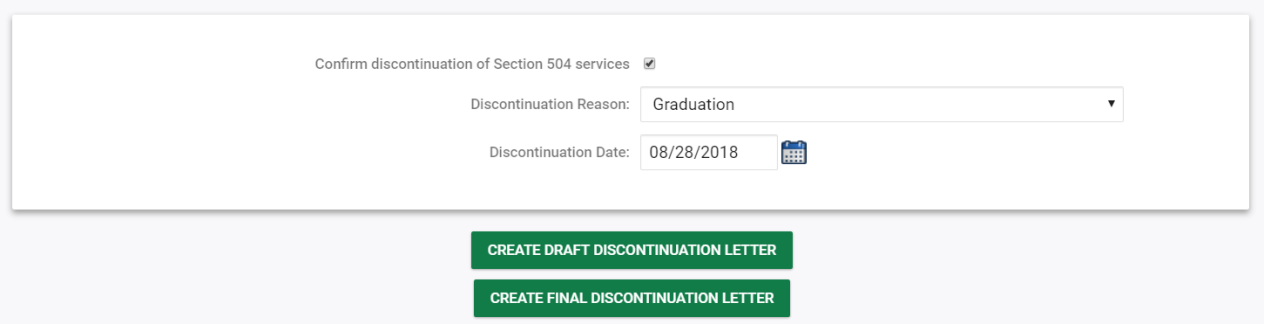
Discontinuing Section 504 Services and Accommodations

1) Obtain a copy of the parent or student request to discontinue services or accommodations under Section 504 and place it in the student's record.
    a. This parental request should be sent into the system using EasyFAX™ or PaperClip™ (if available). For a guide on how to use EasyFAX, see the EasyFAX manual on the Main Menu document library

2) To discontinue a student from receiving 504 services, go back to the 504 Process Main page.



3) Click "Discontinue 504 Services"

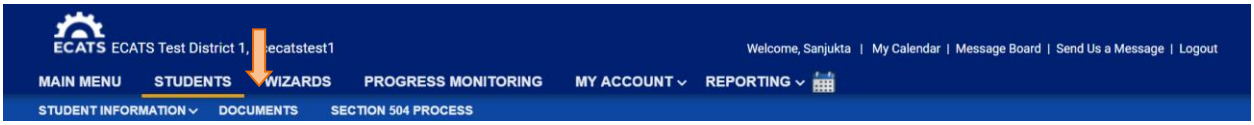


4) You should now be looking at the above screen. Use the dropdown list to provide the reason for the student no longer receiving accommodations or services, use the calendar to enter the date, and be sure to check "Confirm discontinuation of Section 504 services". Once everything is filled out, click "Save and Continue".

5) Your student will be discontinued from receiving 504 services. ***Note:*** *A student is not discontinued from receiving 504 services if they are no longer deemed eligible. In those cases, the eligibility determination must be completed to determine non-eligibility.*

Other Documents

1) Other documents may be created via the student's Documents tab:



2) Select from the given list which document you would like to create. Other 504 documents available to create include:
   a. Invitation to Conference: Section 504 Planning Meeting
   b. Manifestation Determination Review
   c. Parent Consent for Evaluation
   d. Student and Parent Rights
   e. Review of Accommodations (covered in greater detail in the next section)

3) Click either 'Create Draft Document' or 'Create Final Document'.

4) You will be navigated to a page that asks for any additional information the document requires. ***Note****: Not all documents require additional information. These will just have an option to create the document or 'Save and Continue'*.

5) Once you have provided any additional information required, you have the option to either create your document or 'Save and Continue'.
   a. If you do create your document, all you need to do is click on the hyperlinked name of the document to view it. Once you have opened your document you may click 'Save and Continue'
   b. If you do not create your document and instead click 'Save and Continue', you will be navigated back to the '504 Document Creation' page.

6) Once you have created your document, it will appear in a table at the bottom of the Documents page. Same rules apply for Draft and Final documents. The draft will be available for 30 days while the final document is permanent. You can always create a new final or draft, but we keep copies of every final you create for our records. In addition, you will not be able to create a final document if you are missing required information.

Review of Accommodations Form

Because this is a form used across multiple areas of concern it is not located on the 504-specific documents list, but other the General documents list. To access this form:

1) Search for the student you are interested in working on using the Student Search feature (see bottom pg. 5-6), and then click on the students hyperlinked name.

2) From the tab list at the top, select 'Documents'.

3) From the list, find the document titled 'Accommodation Review' and then select the radial button beside it.

4) Scroll down to the bottom of the document list and click either 'Create Draft' or 'Create Final'.

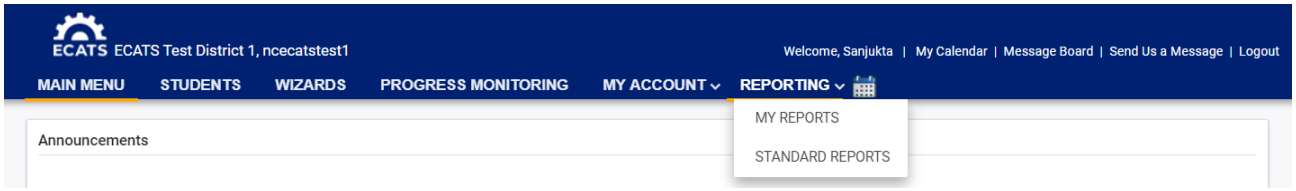
5) A new page should open up. Select which test(s) you would like to create this document for. ***Note****: The list of tests that appear here are directly linked to the state list of tests on the 'Development of a 504 Accommodation Plan' page. If a test you are looking for does not appear on this page, it is because the student does not had 'With Accommodations' selected for that particular test on their 504 plan.*

6) Once you have selected the desired tests, click 'Create Draft/Final Document'.

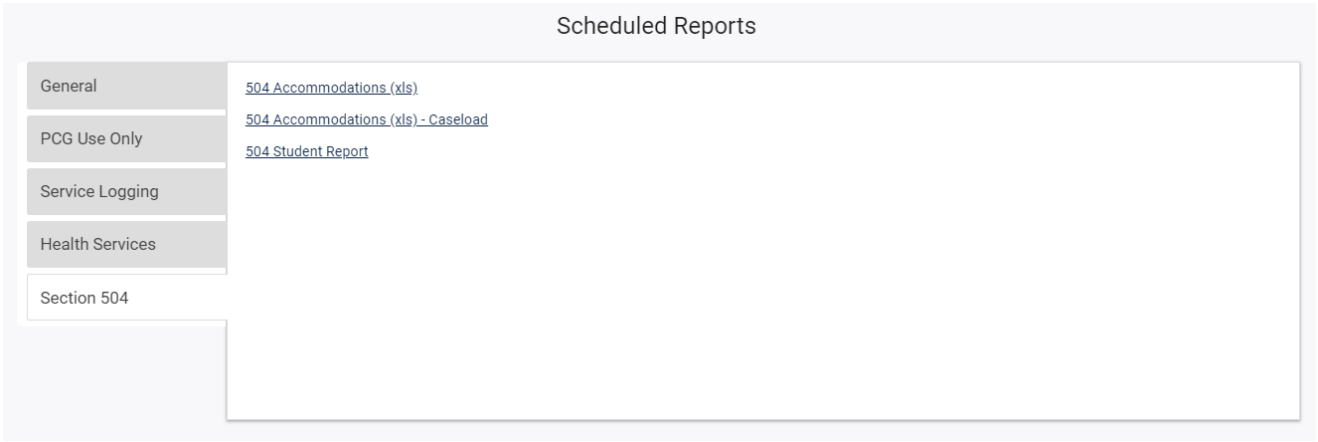
7) Click on the hyperlinked 'View' button and your document will open.

Report of Accommodations in Excel

A report of accommodations can also be created in Excel. To access reports, select the Reporting tab in the dark blue menu at the top of the page, and then Standard Reports.



On the Reports page, click on the Section 504 tab and select the 504 Accommodations (xls) – Caseload report.



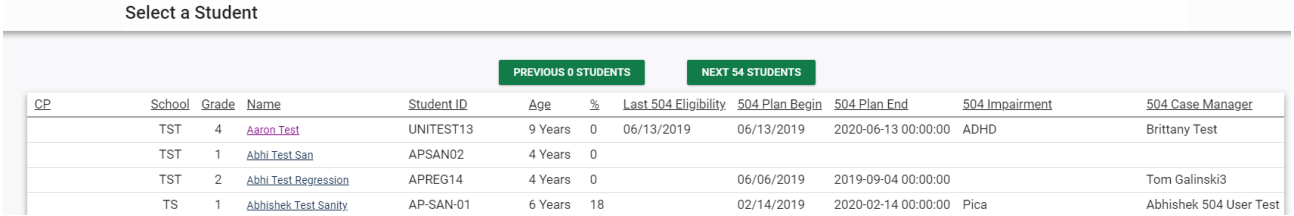
When running the report, select the following:

1) Date of accommodations – will include all accommodations for currently valid plans as of the entered date
2) Plan – check option 504 (note this is a shared report with IEP, so IEP options may appear)
3) School(s) – you will only have access to run for schools you are assigned to
4) Grade(s) – some or all may be selected
5) Choose tests from the 504 – Testing Participation Areas section – some or all may be selected

Then choose to Generate Report.

After the report is run, an alert will be sent to the email address entered under the My Account > My Info page. Results can be retrieved and viewed under My Account > My reports.

Student Search Results

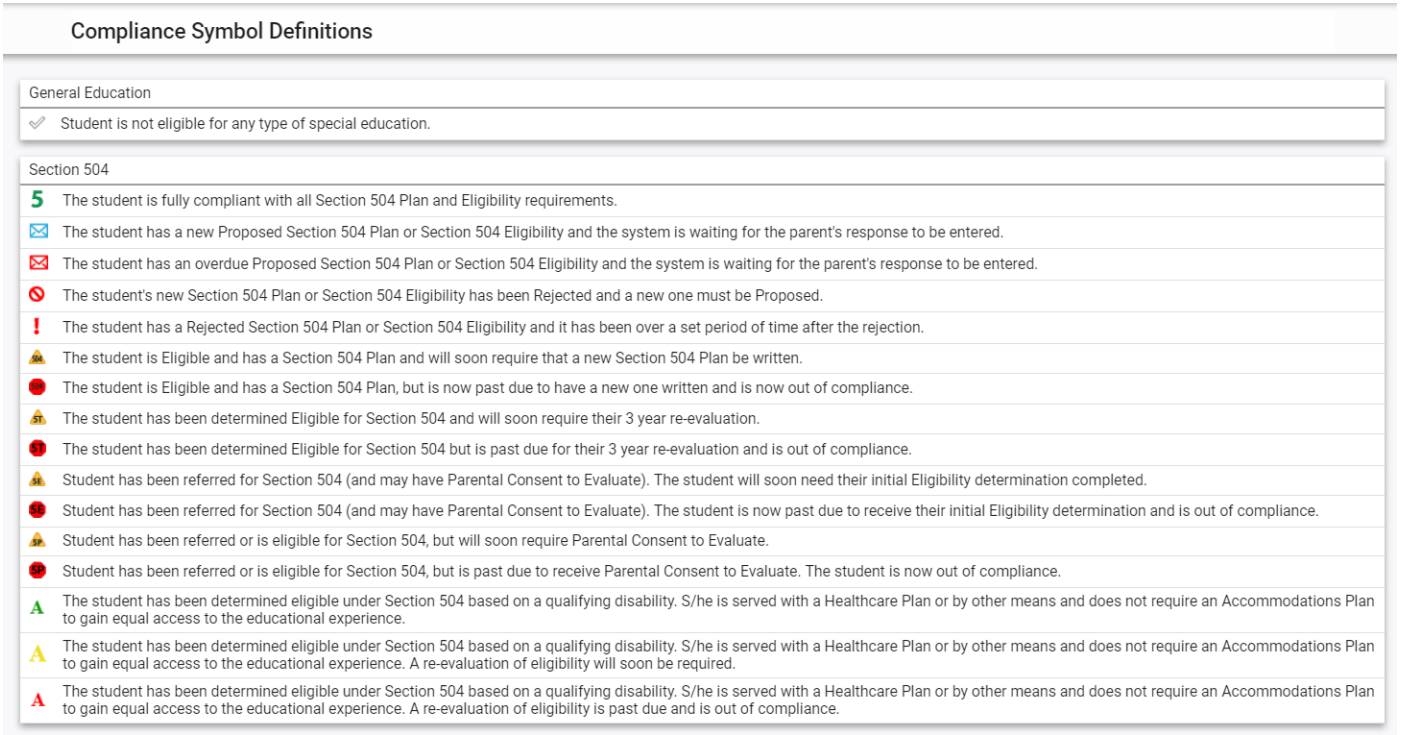

Select a Student

PREVIOUS 0 STUDENTS NEXT 54 STUDENTS

CP	School	Grade	Name	Student ID	Age	%	Last 504 Eligibility	504 Plan Begin	504 Plan End	504 Impairment	504 Case Manager
	TST	4	Aaron Test	UNITEST13	9 Years	0	06/13/2019	06/13/2019	2020-06-13 00:00:00	ADHD	Brittany Test
	TST	1	Abhi Test San	APSAN02	4 Years	0					
	TST	2	Abhi Test Regression	APREG14	4 Years	0		06/06/2019	2019-09-04 00:00:00		Tom Galinski3
	TS	1	Abhishek Test Sanity	AP-SAN-01	6 Years	18		02/14/2019	2020-02-14 00:00:00	Pica	Abhishek 504 User Test

1) For those of you familiar with the EdPlan™ system, you will notice that this looks a little different. Here we will go over the **CP, Last 504 Elig, 504 Plan Begin, 504 Plan End,** and **504 Dis** columns.

2) **CP**: This is our Compliance Symbol's column. It provides users with an at-a-glance reference for what is going on with their students. The symbols on the right are for IEP while those on the left are for 504. If you ever have a question, you can click on the hyperlinked "CP" at the top to view the reference list.


Compliance Symbol Definitions

General Education

✓	Student is not eligible for any type of special education.

Section 504

5	The student is fully compliant with all Section 504 Plan and Eligibility requirements.
	The student has a new Proposed Section 504 Plan or Section 504 Eligibility and the system is waiting for the parent's response to be entered.
	The student has an overdue Proposed Section 504 Plan or Section 504 Eligibility and the system is waiting for the parent's response to be entered.
	The student's new Section 504 Plan or Section 504 Eligibility has been Rejected and a new one must be Proposed.
!	The student has a Rejected Section 504 Plan or Section 504 Eligibility and it has been over a set period of time after the rejection.
	The student is Eligible and has a Section 504 Plan and will soon require that a new Section 504 Plan be written.
	The student is Eligible and has a Section 504 Plan, but is now past due to have a new one written and is now out of compliance.
	The student has been determined Eligible for Section 504 and will soon require their 3 year re-evaluation.
	The student has been determined Eligible for Section 504 but is past due for their 3 year re-evaluation and is out of compliance.
	Student has been referred for Section 504 (and may have Parental Consent to Evaluate). The student will soon need their initial Eligibility determination completed.
	Student has been referred for Section 504 (and may have Parental Consent to Evaluate). The student is now past due to receive their initial Eligibility determination and is out of compliance.
	Student has been referred or is eligible for Section 504, but will soon require Parental Consent to Evaluate.
	Student has been referred or is eligible for Section 504, but is past due to receive Parental Consent to Evaluate. The student is now out of compliance.
A	The student has been determined eligible under Section 504 based on a qualifying disability. S/he is served with a Healthcare Plan or by other means and does not require an Accommodations Plan to gain equal access to the educational experience.
A	The student has been determined eligible under Section 504 based on a qualifying disability. S/he is served with a Healthcare Plan or by other means and does not require an Accommodations Plan to gain equal access to the educational experience. A re-evaluation of eligibility will soon be required.
A	The student has been determined eligible under Section 504 based on a qualifying disability. S/he is served with a Healthcare Plan or by other means and does not require an Accommodations Plan to gain equal access to the educational experience. A re-evaluation of eligibility is past due and is out of compliance.

Above is the specific list for 504. .

3) **Last 504 Eligibility:** This is the date of the last eligibility determination for 504. The eligibility determination will be good for 3 years. Clicking on the column title "Last 504 Elig" will also allow you to sort by this criterion. The sort function works for every column with the exception of "CP".

4) **504 Plan Begin:** This is the start date of the most recent 504 accommodation plan.

5) **504 Plan End:** This is the "due date" for the annual review of the student's 504 accommodation plan. Accommodation plans must be reviewed annually.

6) **504 Dis:** This is the student's documented impairment(s).

Saving Your Work

It is important to save your work, but it may not always be obvious when this occurs. Below is some clarification on when your work is saved.

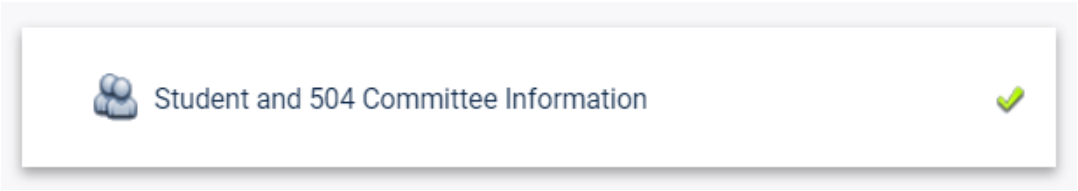
1) Each time you click **Save** or **Save and Continue**, your updates will be saved.
2) Whenever you click **Generate Draft**, **Create Draft**, **Generate Final**, or **Create Final** for a document, the information you have entered will be saved.
3) When you click **Select 504 Committee** ('Student and 504 Committee Information' section), **Add Accommodations** ('Development of a 504 [Accommodation] Plan' section), or **Update the Database**, your information will be saved.
4) The way you know your information is being saved is if, when you click a button, a progression bar pops up with a Blue progression image moving across the box. Depending on the connection speed of your Internet this image may only be up for a short time, but if you see it you know your data is stored.
5) This should cover most of what you may run into, but if in doubt, always click **Save** before you perform your next action.

Setting Up Your Caseload

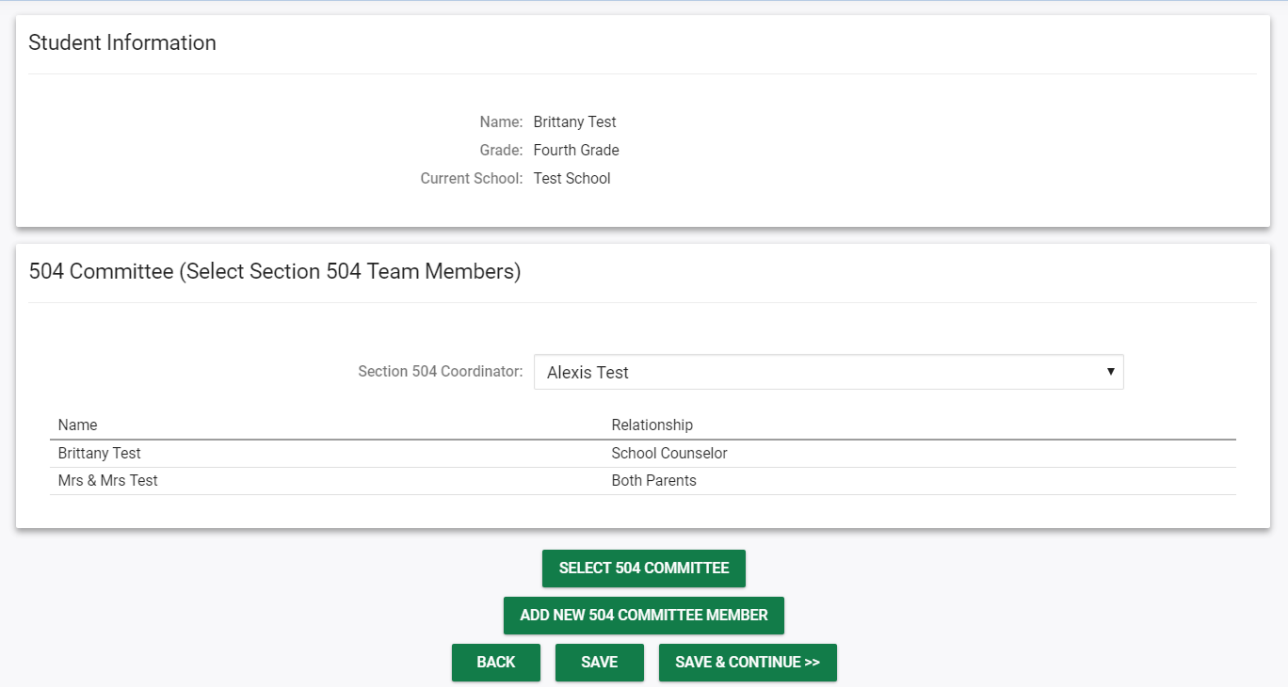
Caseload is a personal student cataloging system built right in to the system. It allows you to filter out all of the students you are currently working on and view them with little effort. There are two ways in which you can add students to your caseload; through the 'Student and 504 Committee Information' link or through the 'Wizards' tab.

Student and 504 Committee Information

1) The first method to add students to your caseload is through the Student and 504 Committee Information' link under the 'Section 504 Process' tab.



2) Once you are on the 'Section 504 Process' (See 'Navigating to the 504 Page' on pg. 5 for instructions), click on the 'Student and 504 Committee Information' link.

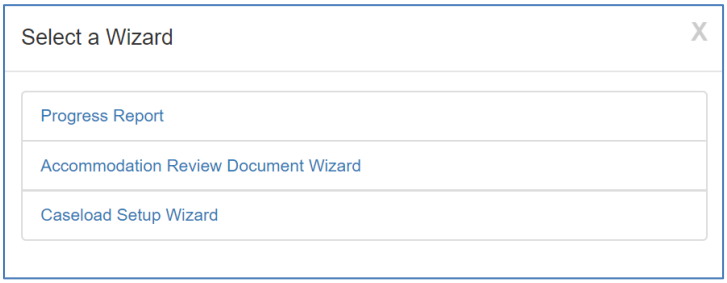


3) Beside 'Section 504 Chairperson', select your name from the dropdown list (where Test Administrator's name currently is in the image above). If you are not to be the Chairperson but still need the student on your caseload, add yourself as part of the committee.

4) Click 'Save' or 'Save & Continue', and the student will be added to your caseload.

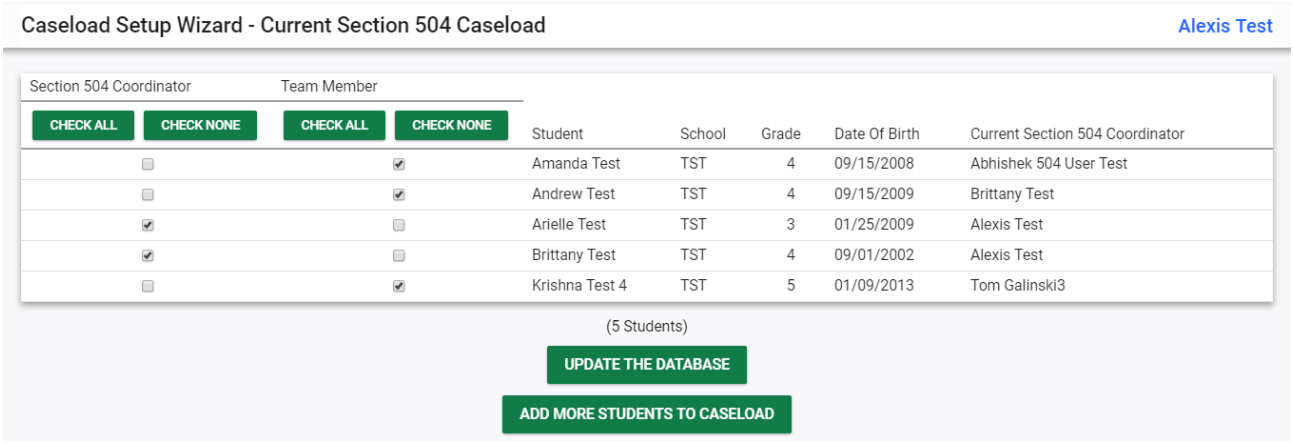
Using the Wizard

1) The Wizards feature is designed for efficiency and is great if you need to add or delete multiple students from your caseload. Starting from the 'Main Menu', click on the 'Wizards' tab.



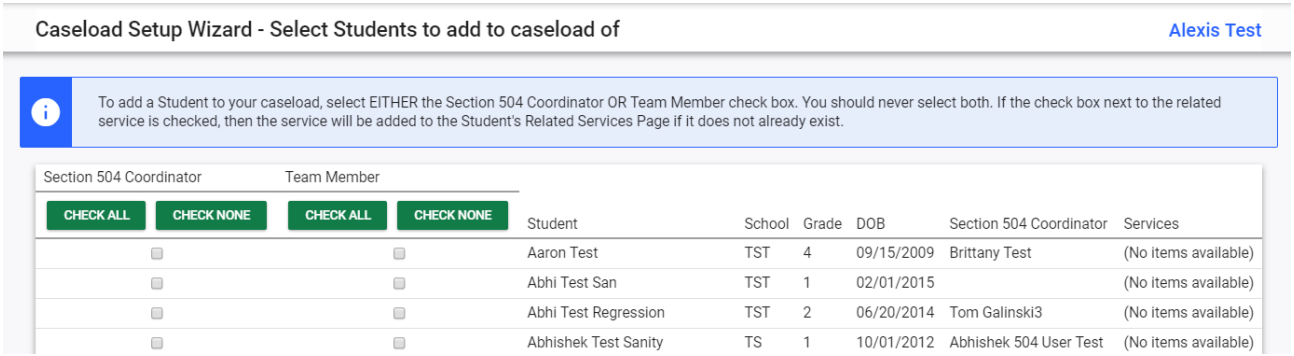
2) You should now be looking at your available wizards. Next, click on 'Caseload Setup Wizard'.

3) It is possible to set up different Caseloads depending on which of the students' needs you are addressing. To create your Caseload for Section 504, click on the dropdown box and select 'Section 504'. Then, click 'Go to Users Caseload'.



4) The image above shows a list of all your students. Click 'Add More Students to Caseload'.

5) Here you can search for the students you want to add to your Caseload. Notice that it looks very similar to the student search screen. It functions much the same way. Enter your student's information and then click 'View Students'.



6) Look for your student and add them to your Caseload. You can do this by checking that you are either their committee Chairperson or that you are a committee team member. Once you have made all of your selections, you can add the students to your Caseload and continue searching or finish adding students. To finish, click 'Add Students to Caseload'. ***Note****: If you accidentally add a student that is not yours, or if there are students on your caseload that you are no longer working with, simply click on the box beside their name to uncheck it. Click 'Update the Database' and the student(s) will be removed from your Caseload.*

7) You have now successfully created your Caseload. If it ever needs updating, you can come back to this process and add more students or, if you need to remove students, come to this page, uncheck the box beside their name, and click 'Update the Database'. This process will remove the child from your Caseload.

8) To demonstrate the functionality of having a Caseload, click on the 'Students' tab.

9) You are now looking at the student search page, at the bottom of the page, click on 'View My Caseload'.

10) This will bring up a list of all the students you have added to your Caseload, including 504 but also for IEP and EL. This allows you to view all of your students without having to constantly search for them. You have now finished the Caseload process. We hope you enjoy the convenience this function provides.

11) *Notice: If you scroll down to the bottom of the screen, you will see two buttons: 'Print Caseload' and 'Export Caseload'. The 'Print Caseload' button will format the data in a way that is printer friendly. The 'Export Caseload' button will send your student data to Excel where you can edit it to fit your needs. If when you export the data you see '##########' where a data field should be, simply expand the column for that box. Once the box is wide enough, the data will appear.*