



Creating Banks

Training Guide



ProgressBook®
Special Services

Software Answers, Inc.
6770 Snowville Rd., Suite 200
Brecksville, Ohio 44141

www.progressbook.com
www.software-answers.com

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Lesson *Objective*

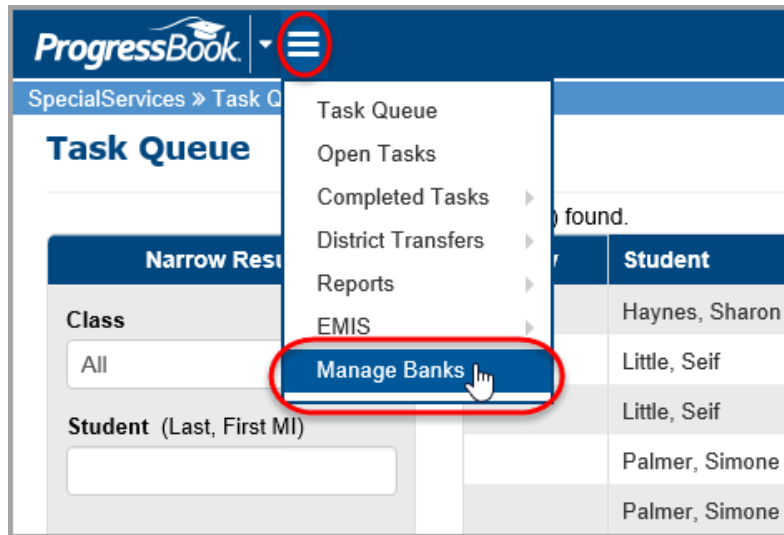
- **Create, edit, and customize banks items**

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Access & Navigation

Once you are logged in to SpecialServices, click  to access the main menu, and then select **Manage Banks**.



The **Manage Banks** screen displays.

IEP Individualized Education Program

This IEP will be implemented during the regular school term unless noted in general factors.

CHILD'S INFORMATION

NAME: _____
ID NUMBER: _____ GRADE: /
DATE OF BIRTH: _____ GENDER: _____
STREET: _____
CITY: _____ STATE: _____ ZIP: _____
DISTRICT OF RESIDENCE: _____
COUNTY OF RESIDENCE: _____
DISTRICT OF SERVICE: _____

Will the child be 14 years old before the end of this IEP? YES NO
Is the child a ward of the state? YES NO
If yes, provide the name of the surrogate parent: _____

PARENTS'/GUARDIAN'S INFORMATION

NAME: _____
STREET: _____
CITY: _____ STATE: _____ ZIP: _____
HOME PHONE: _____ WORK PHONE: _____
CELL PHONE: _____ EMAIL: _____

MEETING INFORMATION

MEETING DATE: _____
MEETING TYPE: _____
 INITIAL IEP
 ANNUAL REVIEW
 REVIEW OTHER THAN ANNUAL REVIEW

 AMENDMENT
 OTHER

IEP TIMELINES

ETR COMPLETION DATE: _____
NEXT ETR DUE DATE: _____
IEP EFFECTIVE DATES
START: _____
END: _____
NEXT IEP REVIEW: _____
IEP BY 3rd BIRTHDAY? YES NO
(if transitioning from EI services)

IEP FORM STATUS (checked when complete)

1. FUTURE PLANNING
 2. SPECIAL INSTRUCTIONAL FACTORS
 3. PROFILE
 4. POSTSECONDARY TRANSITION



Bank Items

Creating bank items is an easy way to save time when filling out forms. Once they are created, you can import the text into certain fields on your forms instead of having to retype it. Depending on the field, bank items are customizable. You can also add state standards to bank items with the click of a button.

Creating a Bank Item

Select a task and form from the **Select Task** and **Select Form** drop-down lists at the top of the screen, and click on a field for which you would like to create bank items.

ProgressBook

Select Task IEP Select Form IEP Cover Page

Please select a field for editing

IEP Individualized Education Program

Note: If a field is not capable of using bank items, a message displays in the column at the left of the screen.

ProgressBook

SADoc (SADoc)

Select Task IEP Select Form IEP Cover Page

Banks are not available for this field

IEP Individualized Education Program

This IEP will be implemented during the regular school term unless noted in general factors.

CHILD'S INFORMATION

NAME: _____

ID NUMBER: _____ GRADE: [v] / [v]

DATE OF BIRTH: _____ GENDER: _____

STREET: _____

CITY: _____ STATE: _____ ZIP: _____

DISTRICT OF RESIDENCE: _____

COUNTY OF RESIDENCE: _____

MEETING INFORMATION

MEETING DATE: _____

MEETING TYPE:

INITIAL IEP

ANNUAL REVIEW

REVIEW OTHER THAN ANNUAL REVIEW

AMENDMENT

If the field you selected is capable of using bank items, the area at the left of the screen populates with a **My Banks** section and a **District Banks** section.

The screenshot shows the ProgressBook interface for an IEP form. On the left, there are two sections: 'My Banks' and 'District Banks', both showing 'No Items Found' and a plus icon. The main form area contains several sections: 'PARENTS / GUARDIAN INFORMATION' with fields for NAME, STREET, CITY, STATE, ZIP, HOME PHONE, WORK PHONE, and CELL PHONE; 'OTHER INFORMATION' which is highlighted with a red box; 'IEP EFFECTIVE DATES' with fields for START, END, and NEXT IEP REVIEW; and 'IEP FORM STATUS' with a list of 15 items to be checked when complete.

Click **+** to add a bank item. The **My Banks** window displays.

The 'My Banks' window is shown with a title bar 'My Banks'. Below the title bar is a 'Bank Item' dropdown menu set to '(New Bank Item)'. Below that is a rich text editor toolbar with various icons for text formatting and editing. Below the toolbar is a large text area for entering the bank item details. Below the text area is a text input field for 'Item Alias'. At the bottom right, there is an 'Add Standards' button. At the bottom center, there are three buttons: 'Save', 'Save & New', and 'Close'.

1. Enter the text for your bank item.
2. Create an **Item Alias** that will be listed under the **My Banks** section on the **Manage Banks** screen.
3. Click **Save**. A message displays indicating the bank item was saved, and the **Bank Item** field at the top populates with the **Item Alias**.
4. Optional: If you wish to create another bank item, click **Save & New**.
5. Click **Close** to return to the previous screen.

My Banks

Bank Item Eng primary lang

English is the primary language spoken at home. 1

Enter #he/she#, #him/her#, or #first# (student's first name) and the appropriate value will be displayed when the item is placed on a form. Add Standards

2 Item Alias Eng primary lang

3 Save 4 Save & New 5 Close

The bank has been saved.

Note: You can use the shortcuts at the bottom of the **My Banks** window to auto-populate the gender pronoun or first name of the student.

Bank Item

#first# has a part-time job

Enter #he/she#, #him/her#, or #first# (student's first name) and the appropriate value will be displayed when the item is placed on a form.

Item Alias

Save Save & New Close

All of the bank items you create display under **My Banks** on the **Manage Banks** screen.

ProgressBook

Select Task Select Form

My Banks +

- employment
- Eng primary lang

District Banks

No Items Found

IEP Individualized Education

This IEP will be implemented during the regular sch

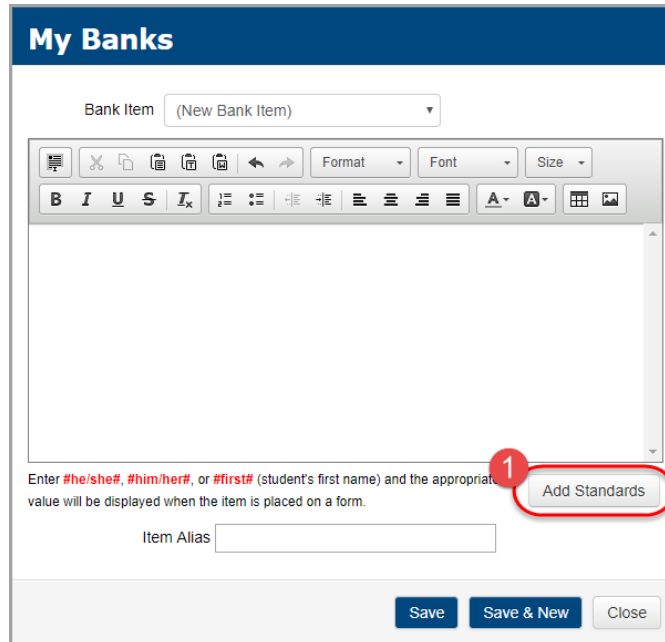
CHILD'S INFORMATION

NAME:

Adding Standards to a Bank Item

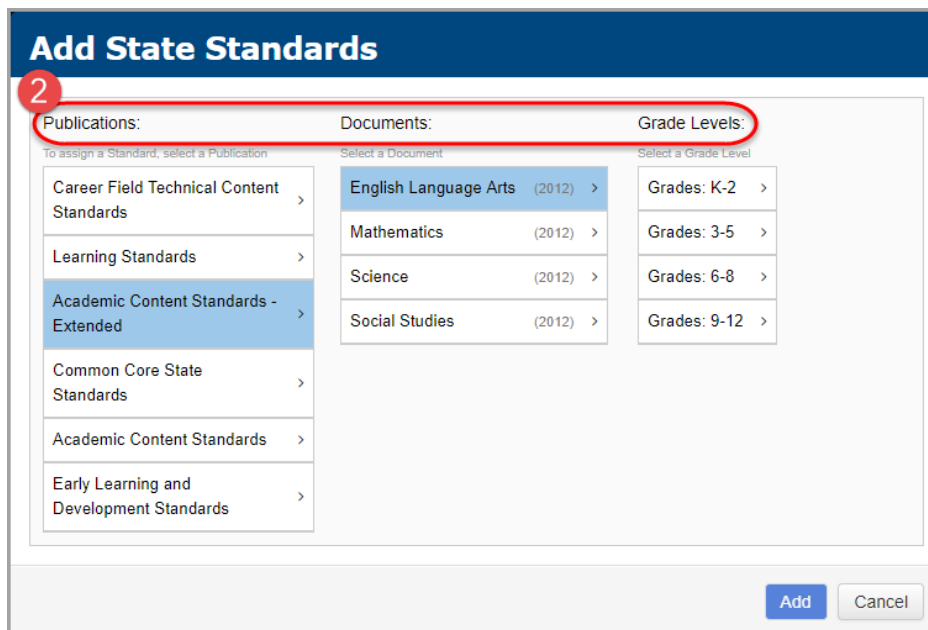
Use this optional feature to add text from one or more state standards into the bank item.

1. On the **My Banks** window, click **Add Standards**.




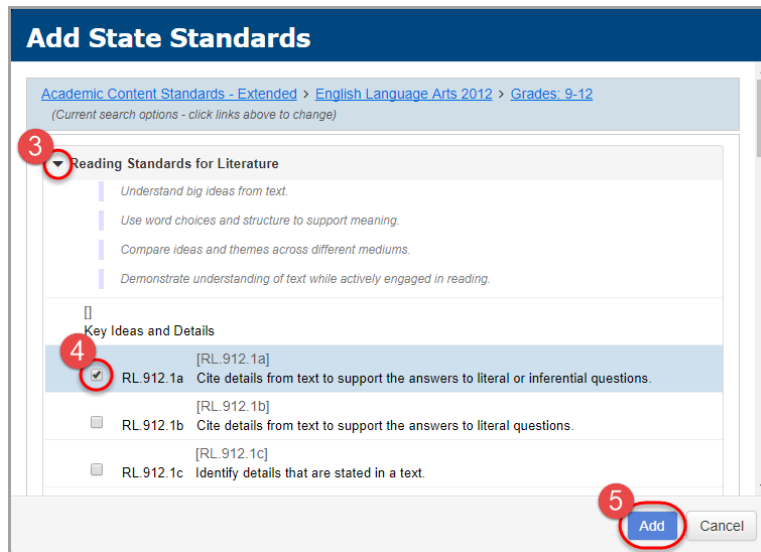
The screenshot shows the 'My Banks' window. At the top, there is a 'Bank Item' dropdown menu set to '(New Bank Item)'. Below this is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, indent, outdent, text color, background color, and insert image. A large text area is below the toolbar. At the bottom of the text area, there is a red circle with the number '1' next to the 'Add Standards' button. Below the text area is an 'Item Alias' input field. At the very bottom of the window are three buttons: 'Save', 'Save & New', and 'Close'.

2. On the **Add State Standards** window, select a publication from **Publications**, a document from **Documents**, and a grade level from **Grade Levels**.

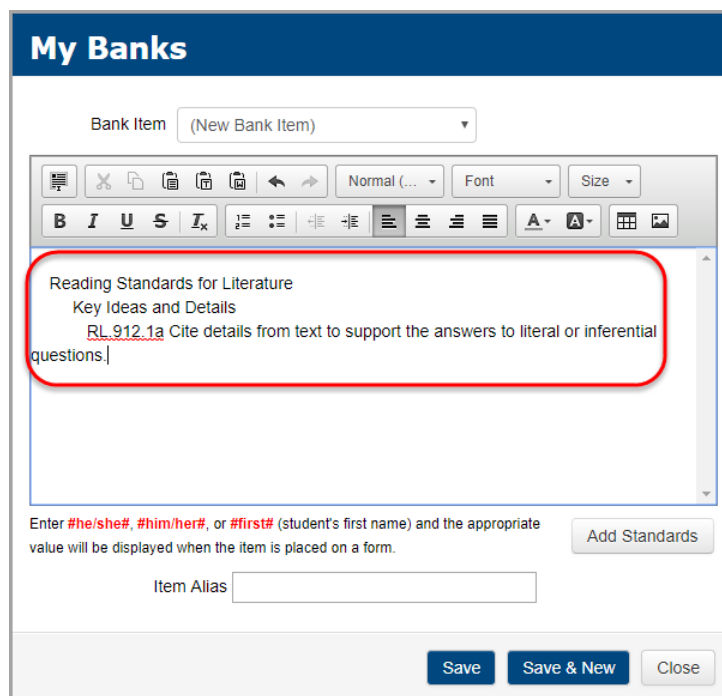


The screenshot shows the 'Add State Standards' window. It has three columns: 'Publications', 'Documents', and 'Grade Levels'. A red circle with the number '2' is around the top of these columns. The 'Publications' column has a list of items: 'Career Field Technical Content Standards', 'Learning Standards', 'Academic Content Standards - Extended', 'Common Core State Standards', 'Academic Content Standards', and 'Early Learning and Development Standards'. The 'Documents' column has a list: 'English Language Arts (2012)', 'Mathematics (2012)', 'Science (2012)', and 'Social Studies (2012)'. The 'Grade Levels' column has a list: 'Grades: K-2', 'Grades: 3-5', 'Grades: 6-8', and 'Grades: 9-12'. At the bottom right are 'Add' and 'Cancel' buttons.

3. Click the  next to the subject to expand the options for each subtopic within that subject.
4. Select the check box next to each standard you want to add.
5. Click **Add**.

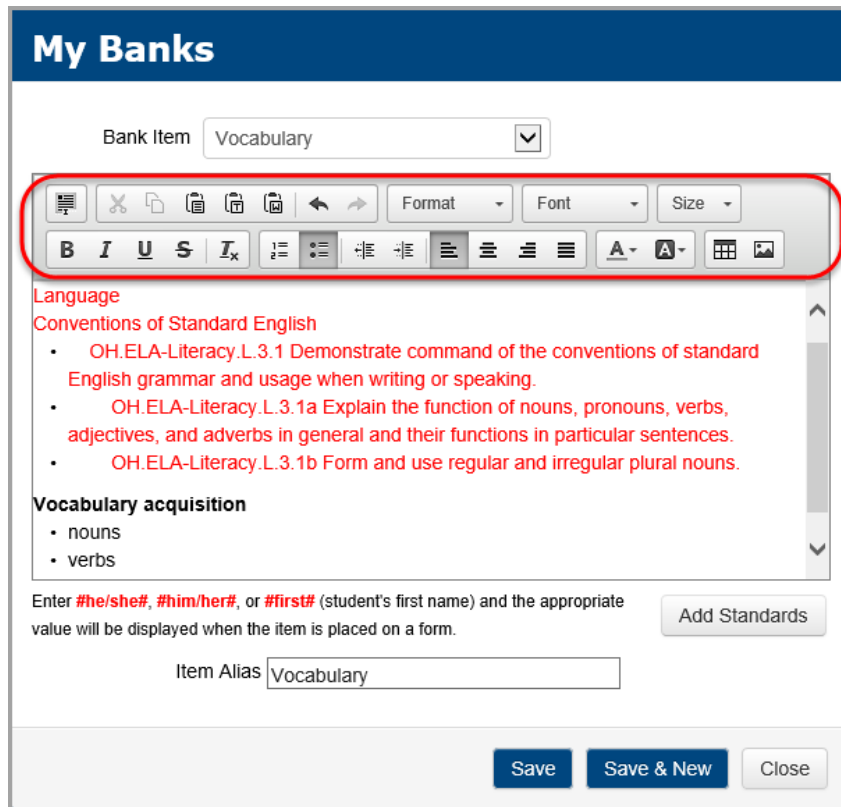


After you click **Add**, you return to the **My Banks** window where the text from the standard(s) you selected now displays.



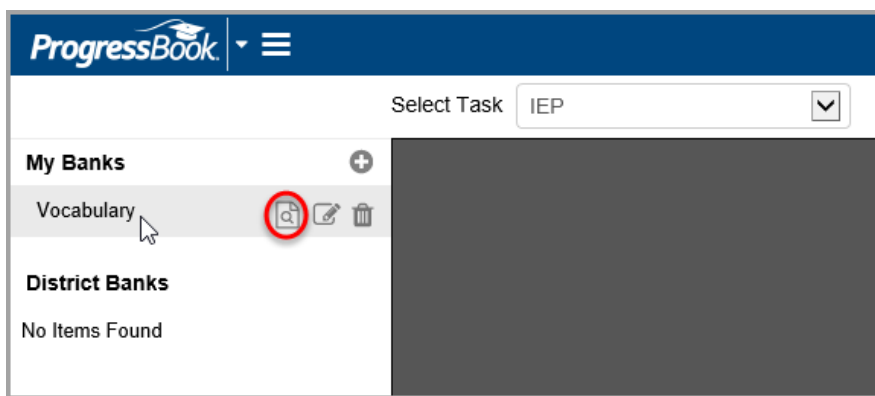
Customizing Bank Items

Depending on the field for which you are creating a bank item, you may be able to customize your bank item using the toolbar that displays at the top of the window.



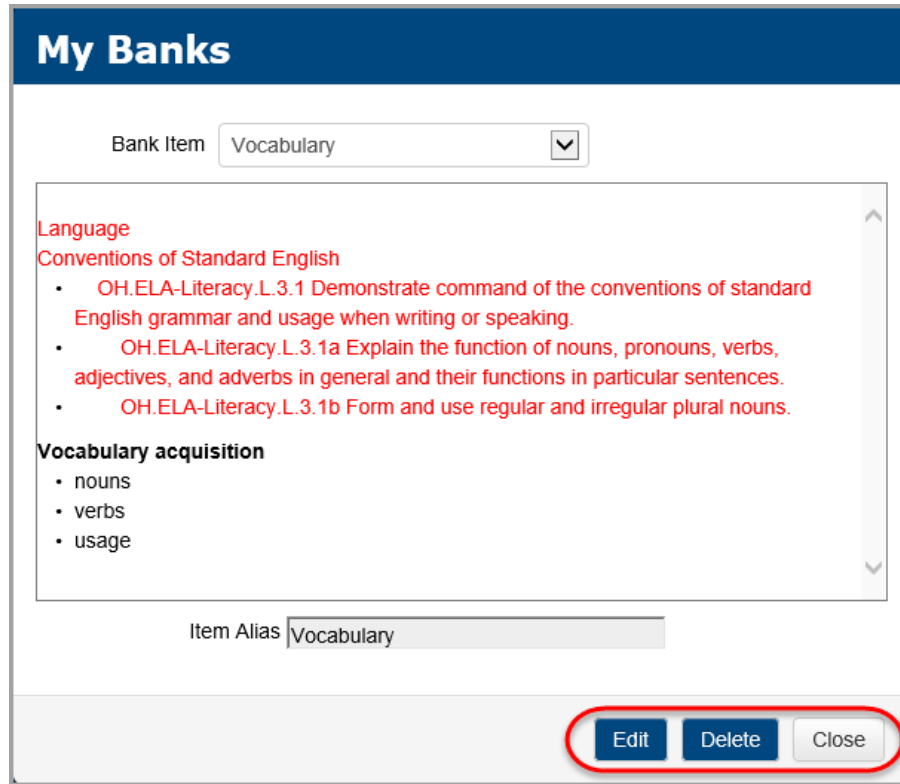
Preview Bank Items

Hover your cursor over the bank item you wish to preview and click .




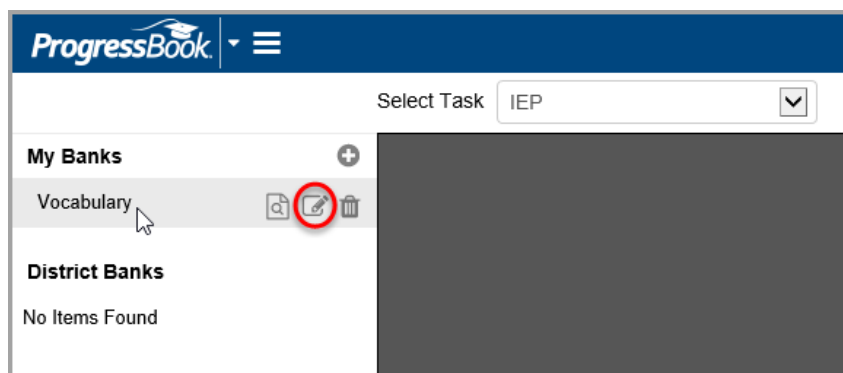
The **My Banks** preview window displays. From here, you can choose to **Edit** or **Delete** the bank item. Click **Close** when you are done previewing.

Note: You can edit and delete bank items from the **My Banks** section by hovering your cursor over the bank item and clicking the corresponding icon. See [Edit Bank Items](#) and [Delete Bank Items](#).

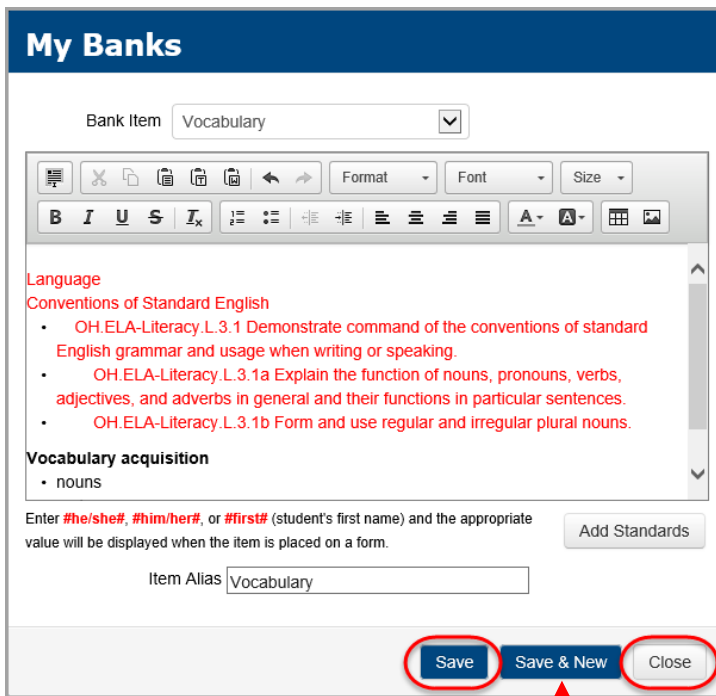


Edit Bank Items

Hover your cursor over the bank item you wish to preview and click .



The **My Banks** window displays. From here, you can make any necessary changes to the fields. Click **Save** when you are done. Click **Close** to return to the previous screen.



The screenshot shows the 'My Banks' window with a 'Bank Item' dropdown set to 'Vocabulary'. Below this is a rich text editor toolbar with options for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, indent, outdent, decrease indent, increase indent, font size, and font color. The text area contains the following content:

Language
Conventions of Standard English

- OH.ELA-Literacy.L.3.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.
- OH.ELA-Literacy.L.3.1a Explain the function of nouns, pronouns, verbs, adjectives, and adverbs in general and their functions in particular sentences.
- OH.ELA-Literacy.L.3.1b Form and use regular and irregular plural nouns.

Vocabulary acquisition

- nouns

Enter #he/she#, #him/her#, or #first# (student's first name) and the appropriate value will be displayed when the item is placed on a form. Add Standards

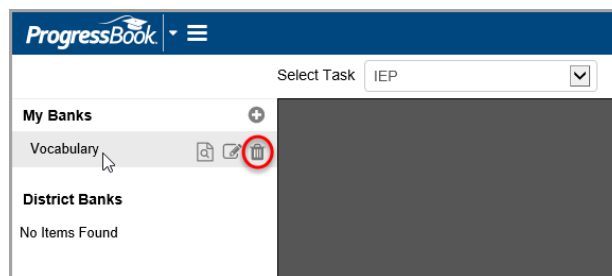
Item Alias

At the bottom, three buttons are visible: 'Save', 'Save & New', and 'Close'. The 'Save' and 'Close' buttons are circled in red, and a red arrow points from the 'Save & New' button to a callout box.

*To create a new bank item from the My Banks window, click **Save & New**.*

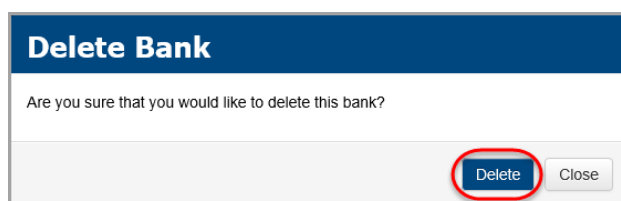
Delete Bank Items

Hover your cursor over the bank item you wish to preview and click  .



The screenshot shows the 'ProgressBook' interface. At the top, there is a 'Select Task' dropdown menu set to 'IEP'. Below this is a 'My Banks' section with a '+' icon. A list item 'Vocabulary' is highlighted, and a mouse cursor is hovering over it. To the right of the 'Vocabulary' item are three icons: a copy icon, a refresh icon, and a trash icon. The trash icon is circled in red. Below the 'My Banks' section is a 'District Banks' section with the text 'No Items Found'.

A message displays asking if you are sure you want to delete the bank. Click **Delete**.



The screenshot shows a 'Delete Bank' dialog box. The title bar reads 'Delete Bank'. The main text asks, 'Are you sure that you would like to delete this bank?'. At the bottom right, there are two buttons: 'Delete' and 'Close'. The 'Delete' button is circled in red.