



# Creating Tasks

## *Training Guide*



*ProgressBook*®  
***Special Services***

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# Lesson *Objectives*

- **Create new task items**
- **Add forms to tasks**
- **Create task pages**
- **Add attachments to tasks**
- **Upload pages to tasks**
- **Delete pages, forms, and attachments**
- **Print forms**
- **Verify EMIS**

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# Glossary

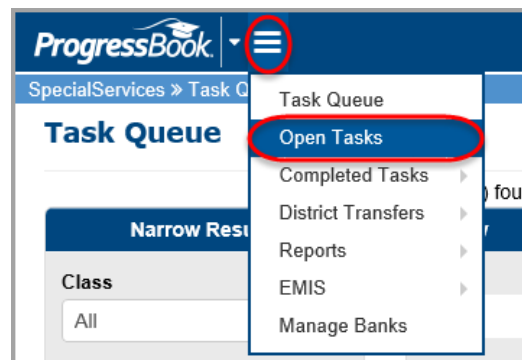
- **Task** — a set of all of the mandatory forms needed for a student to receive special services, such as an IEP, ETR, or 504 Plan
- **Form** — a required or optional document that makes up a task, such as the IEP 6 Measurable Annual Goals form or the 504 Plan 2 Statewide and District Testing form. Forms can be made up of multiple pages.
- **Page** — an instance of a form. Some task forms allow the creation of multiple pages. For example, on the IEP 6 Measurable Annual Goals form, you can add as many Goal pages as necessary.



# Access & Navigation

Once you are logged in to SpecialServices, you can access the **Open Tasks** screen in one of two ways:

- Click  to access the main menu, and then select **Open Tasks**.

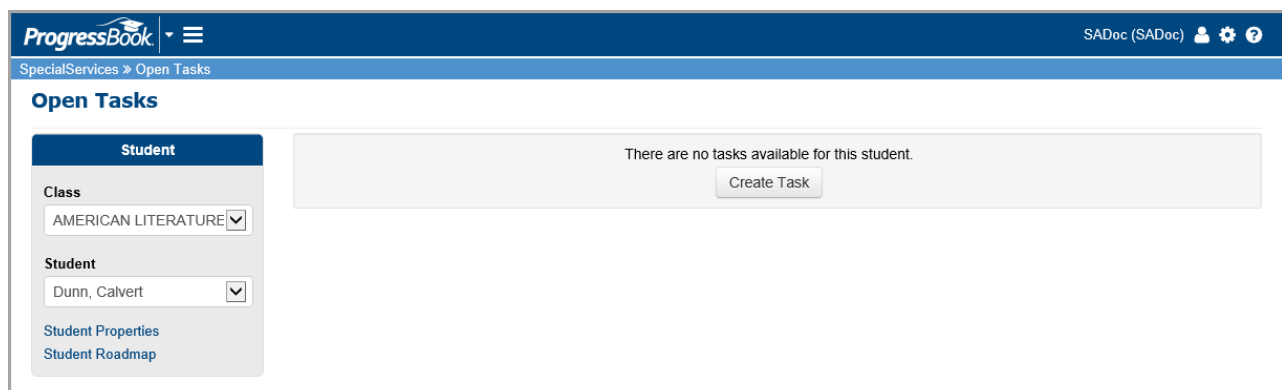


- From the **Task Queue** screen, in the **Task** column, click the link to the task you want to view.

The screenshot shows the ProgressBook 'Task Queue' screen. The breadcrumb trail is 'SpecialServices » Task Queue'. The page title is 'Task Queue'. Below the title, it says '6 task(s) found.' There is a 'Narrow Results' sidebar on the left with a 'Class' dropdown set to 'All' and a 'Student' search field. The main content is a table with the following columns: Priority, Student, Task, Task Type, Started, Due, and Pages Complete. The table contains six rows of task data. The 'Task' column contains links to task details. The link '2016-2017 IIEP' in the third row is circled in red.

Priority	Student	Task	Task Type	Started	Due	Pages Complete
	Haynes, Sharon	<a href="#">2016-2017 RIEP</a>	RIEP	2/19/2017	3/28/2017	<input type="text"/>
	Little, Seif	<a href="#">2016-2017 IIEP</a>	IIEP	2/19/2017	3/28/2017	<input type="text"/>
	Little, Seif	<a href="#">2016-2017 RETR</a>	RETR	2/19/2017	3/28/2017	<input type="text"/>
	Palmer, Simone	<a href="#">2016-2017 IIEP</a>	IIEP	2/19/2017	3/28/2017	<input type="text"/>
	Palmer, Simone	<a href="#">2016-2017 RETR</a>	RETR	2/19/2017	3/28/2017	<input type="text"/>
	Potter, Sheryl	<a href="#">2016-2017 RIEP</a>	RIEP	2/19/2017	3/28/2017	<input type="text"/>

In both instances, the **Open Tasks** screen displays.







# Creating Tasks

Creating a task can be completed in one of two ways:

- Creating a New Task
- Creating a New Task from an Existing Task

## Creating a New Task

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

1. On the **Open Tasks** screen, in the **Student** drop-down list, select the student for whom you want to create the task.
2. Click **+**.

Task	2016-2017 IIEP	Created By	Open By	Print	Completed
IIEP Cover Page					
Cover Page		Cook, Larry		<input type="checkbox"/>	<input type="checkbox"/>
IIEP 1 Future Planning, 2 Special Factors, 3 Profile					

The **New Task** window displays.

The screenshot shows a 'New Task' form with the following fields and callouts:

- 3**: Task Template dropdown menu (selected: IIEP - Initial IEP)
- 4**: Task Name text field (current value: 2016-2017 IIEP)
- 5**: School Year dropdown menu (selected: 2016-2017)
- 6**: Grade Level dropdown menu (selected: 10)
- 7**: Due Date text field with a calendar icon (current value: 3/10/2017)
- 8**: 'Add to my priority task list' checkbox (checked)
- 9**: 'Start Task' button

Other visible text includes: Student Grant, Alvaro; Create from Previous Task dropdown; and a 'Close' button.

3. In the **Task Template** drop-down list, select the task you want to create.
4. In the **Task Name** field, the name defaults to the current school year followed by the task. Enter a unique task name if desired.
5. In the **School Year** drop-down list, the current school year is selected by default. If the task applies to a different school year, select a different school year from the list.
 

***Note:** If you modify the task name and then select a school year other than the current school year, the task name reverts to the default task name.*
6. In the **Grade Level** drop-down list, select the student's grade level. By default, the student's current grade level displays.
7. In the **Due Date** field, enter or select the due date. The due date is the deadline required for this event to be in compliance with EMIS.
8. Optional: If you want the task to display as **Priority** on the **Task Queue** screen, select the **Add to my priority task list** check box.
9. To create the task, click **Start Task**.

The system automatically creates the required pages for the new task and displays them on the **Open Tasks** screen.

The screenshot shows the ProgressBook SpecialServices Open Tasks screen. The interface includes a sidebar with filters for Student (Grant, Alvaro) and Task Properties (Due Date: 3/10/2017, Start Date: 2/27/2017, Task Type: IIEP, Priority Task checked). The main area displays a table of tasks for '2016-2017 IIEP' with columns for Task Name, Created By (Smiles, Mary), Open By, Print, and Completed. Tasks include IEP Cover Page, IEP 1 Future Planning, IEP 6 Measurable Annual Goals, IEP 7 Specialty Designed Services, IEP 9 NonAcademic, IEP 12 Statewide and District Testing, IEP 13 Meeting Participants, IEP 14 Signatures, Prior Written Notice, Parent Invitation, and Special Ed Events.

From here, you can perform any of the following processes:

- Editing a Task (see the *ProgressBook SpecialServices Editing Tasks Training Guide*)
- Adding a Form
- Creating New Pages
- Adding Attachments
- Uploading Pages
- Deleting Pages, Forms, and Attachments
- Printing Student Forms
- Completing Pages (see the *ProgressBook SpecialServices Editing Tasks Training Guide*)
- Verifying EMIS
- Completing Tasks (see the *ProgressBook SpecialServices Editing Tasks Training Guide*)

## Creating a New Task from an Existing Task

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

How the information is copied depends on whether you are creating a new task from an existing task of the same type or from a task of a different type.


### Same Type

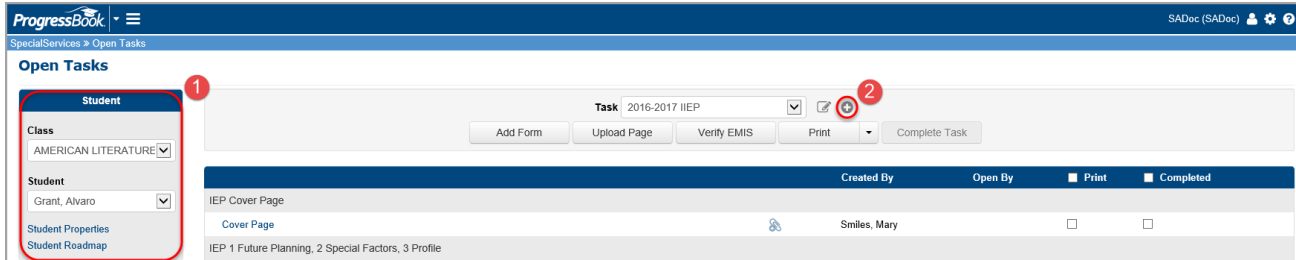
- All of the information entered in the sections of forms from the original task are copied to the corresponding forms in the new task.
- Uploaded pages, additional forms, and attachments added to the original task are copied to the new task.

### Different Type

- Only the information common between forms is copied to the new task.

**Note:** *The demographic information is not copied from the original task to the new task. The system uses the most current demographic information from StudentInformation.*

1. On the **Open Tasks** screen, in the **Student** drop-down list, select the student for whom you want to create the new task.
2. Click .



The **New Task** window displays.

3. In the **Task Template** drop-down list, select the task you want to create.
4. In the **Task Name** field, the name defaults to the current school year followed by the task. Enter a unique task name if desired.
5. In the **School Year** drop-down list, the current school year is selected by default. If the task applies to a different school year, select a different school year from the list.

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

6. In the **Grade Level** drop-down list, select the student's grade level. By default, the student's current grade level displays.
7. In the **Due Date** field, enter or select the due date. The due date is the deadline required for this event to be in compliance with EMIS.

8. In the **Create from Previous Task** drop-down list, select the task from which you want to create the new task.

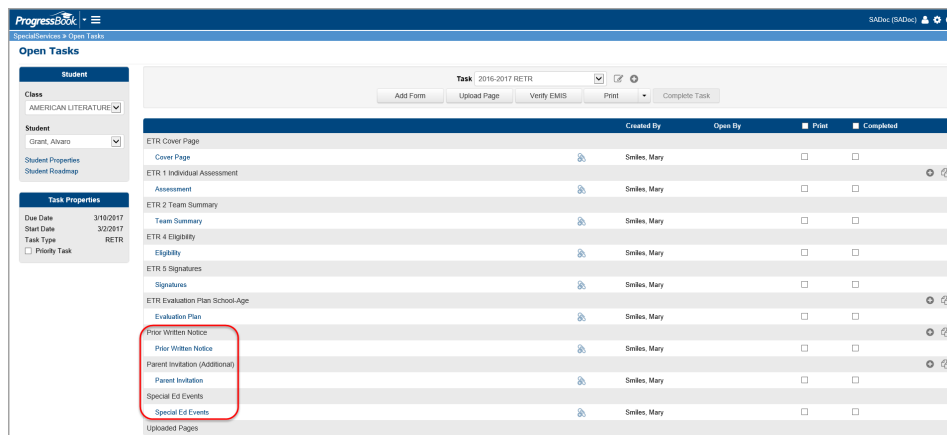
**Note:** Only tasks completed between the current date and 18 months in the past are available for selection in the **Create from Previous Task** drop-down list.

**Note:** Completed tasks display with **Comp:** preceding the task name.

9. Optional: If you want the task to display as **Priority**, on the **Task Queue** screen, select the **Add to my priority task list** check box.

10. To create the task, click **Start Task**.

All of the forms and attachments from the original task are created and display on the **Open Tasks** screen.



Once you have created a task, you can perform the following processes:

- Editing a Task (see the *ProgressBook SpecialServices Editing Tasks Training Guide*)
- Adding a Form
- Creating New Pages
- Adding Attachments
- Uploading Pages
- Deleting Pages, Forms, and Attachments
- Printing Student Forms
- Completing Pages (see the *ProgressBook SpecialServices Editing Tasks Training Guide*)
- Verifying EMIS
- Completing Tasks (see the *ProgressBook SpecialServices Editing Tasks Training Guide*)



# Adding a Form

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

1. On the **Open Tasks** screen, in the **Student** drop-down list, select the appropriate student.
2. In the **Task** drop-down list, select the task to which you want to add a form.
3. Click **Add Form**.

	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile				
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>

The **Add a Form** window displays, listing the additional forms available for the task.

4. Select the check box(es) beside the form(s) you want to add to the task, and then click **Add Forms**.

**Add a Form**

Select form(s) to add:

- IEP 4 PostSecondary Transition (Additional)
- IEP 5 PostSecondary Transition Services (Additional)
- IEP 15 Visual Impairments (Additional)
- Parent Excusal of IEP Team Member (Additional)
- General Invitation (Additional)
- Special Ed Events (Additional)
- Documentation of Attempts (Additional)
- Due Process (Additional)
- Request for Assignment of a Surrogate Parent (Additional)
- Summary of Performance (Additional)

**Add Forms** Close

The selected form(s) and corresponding page(s) display on the **Open Tasks** screen.

ProgressBook SpecialServices » Open Tasks SADoc (SADoc)

**Open Tasks**

Student: Palmer, Simone  
 Class: AMERICAN LITERATURE  
 Task: 2016-2017 IIEP  
 Buttons: Add Form, Upload Page, Verify EMIS, Print, Complete Task

Task	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile				
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals				
Comprehension	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Goal (W)	Smiles, Mary		<input type="checkbox"/>	<input type="checkbox"/>
IEP 7 Specially Designed Services, 8 Transportation as Service				
Services	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Services	Smiles, Mary		<input type="checkbox"/>	<input type="checkbox"/>
IEP 9 NonAcademic, 10 General Factors, 11 LRE				
NonAcademic, General Factors, LRE	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 12 Statewide and District Testing				
Testing	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 13 Meeting Participants				
Participants	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 14 Signatures				
Signatures	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Prior Written Notice				
Prior Written Notice	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Parent Invitation				
Parent Invitation	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
General Invitation (Additional)				
General Invitation	Smiles, Mary		<input type="checkbox"/>	<input type="checkbox"/>
Special Ed Events - IIEP				
Special Ed Events - IIEP	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Summary of Performance (Additional)				
Summary of Performance	Smiles, Mary		<input type="checkbox"/>	<input type="checkbox"/>
Uploaded Pages				





# Creating New Pages

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

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


## Creating a New Page from Scratch

You can create a new page for any form next to which the  displays.


1. On the **Open Tasks** screen, in the **Student** drop-down list, select the student for whom you want to create the page.

2. In the **Task** drop-down list, select the task to which you want to add a page.

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

3. In the row of the page you want to add, click  .

	Created By	Open By	Print	Completed
IEP Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>

**Note:** For forms that do not allow multiple pages, such as the IEP 1 Future Planning, 2 Special Factors, 3 Profile form,  only displays if the page has been deleted, in which case, you must create a new page because it is a required form.

A new page is created and displays in a new row under the form.


The screenshot shows the 'Open Tasks' interface in ProgressBook. On the left, the 'Student' dropdown is set to 'Palmer, Simone'. The 'Task' dropdown is set to '2016-2017 IIEP'. Below these are buttons for 'Add Form', 'Upload Page', 'Verify EMIS', 'Print', and 'Complete Task'. A table lists tasks with columns for 'Created By', 'Open By', 'Print', and 'Completed'. The 'Goal [#]' row is circled in red, and a copy icon is visible in its right-hand corner.


	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page				
IEP 1 Future Planning, 2 Special Factors, 3 Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals				
Goal [#]	Smiles, Mary		<input type="checkbox"/>	<input type="checkbox"/>
Goal [#]	Masters, Paul		<input type="checkbox"/>	<input type="checkbox"/>

#### 4. Optional:

- For information on how to open the page and begin working on it, see the *ProgressBook SpecialServices Editing Tasks Training Guide*
- For information on how to change the default page name to one that is meaningful to you, see the **Renaming Pages** section of the *ProgressBook SpecialServices Editing Tasks Training Guide*

### Creating a New Page from an Existing Page

If  displays in the row of a form, you can create a new page using information from an existing page in the current task, another open task, or a complete task, including tasks or forms transferred from another district using the District Transfers tool.

1. On the **Open Tasks** screen, in the **Student** drop-down list, select the student for whom you want to create a new page from an existing page.
2. In the **Task** drop-down list, select the task to which you want to add a page.
3. In the row of the page you want to create from an existing page, click  .

The screenshot shows the 'Open Tasks' interface in ProgressBook. A red circle labeled '1' highlights the 'Student' dropdown menu. A red circle labeled '2' highlights the 'Task' dropdown menu. A red circle labeled '3' highlights the copy icon in the right-hand corner of a row in the task table.

	Created By	Open By	Print	Completed
Manifestation Determination Review				
Manifestation Determination Review	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Manifestation Determination Worksheet (Additional)				
Manifestation Determination Worksheet	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Special Ed Events				

The **Create From Existing** window opens.

4. In the **Task** drop-down list, select the task from which you want to copy the page.

The **Create From** drop-down list populates with the pages that comprise the selected task.

**Note:** Available completed tasks display with the **Comp:** prefix to assist you in selecting the correct task. All other listed tasks are currently open.

5. In the **Create From** drop-down list, select the page from which you want to copy information for your new page.
6. Click **Create Page**.

**Create From Existing**

Student Palmer, Simone  
Current Page Manifestation Determination Review  
Task 2016-2017 Invite  
Create From Parent Invitation

Create Page Close

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

ProgressBook SpecialServices » Open Tasks

Open Tasks

Student: Palmer, Simone

Task: 2016-2017 Manifestation Determination Review

Task	Created By	Open By	Print	Completed
Manifestation Determination Review	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Manifestation Determination Review	Masters, Paul		<input type="checkbox"/>	<input type="checkbox"/>
Manifestation Determination Worksheet (Additional)				
Manifestation Determination Worksheet	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>

7. Optional:

- For information on how to open the page and begin working on it, see the *ProgressBook SpecialServices Editing Tasks Training Guide*
- For information on how to change the default page name to one that is meaningful to you, see the **Renaming Pages** section of the *ProgressBook SpecialServices Editing Tasks Training Guide*




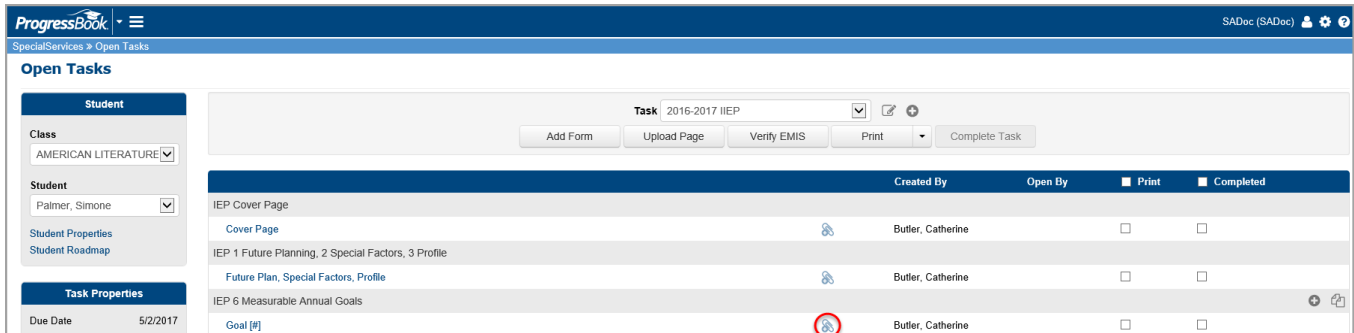
# Adding Attachments

You can add editable attachments to a specific page in an open task.

- When you select to print all of the pages in a task, the attachment displays in the merged document immediately after the page to which it is attached
- When you select to print only one page, the attachment is automatically merged with the selected page


This topic describes how to add an editable attachment to a task page. If you want to upload a read-only PDF to a specific task page or to an overall task, see [Uploading Pages](#).

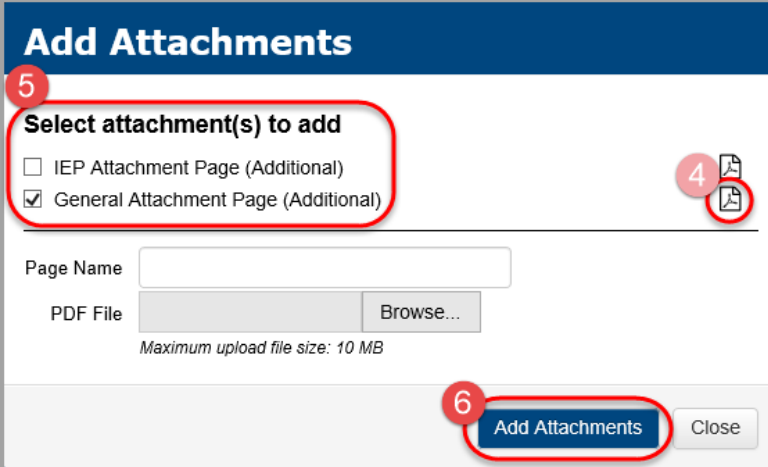
1. On the **Open Tasks** screen, in the **Student** drop-down list, select the student for whom you want to create the page.
2. In the **Task** drop-down list, select the appropriate task.
3. Next to the page to which you want to add an attachment, click .



Task	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile				
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals				
Goal [#]	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>

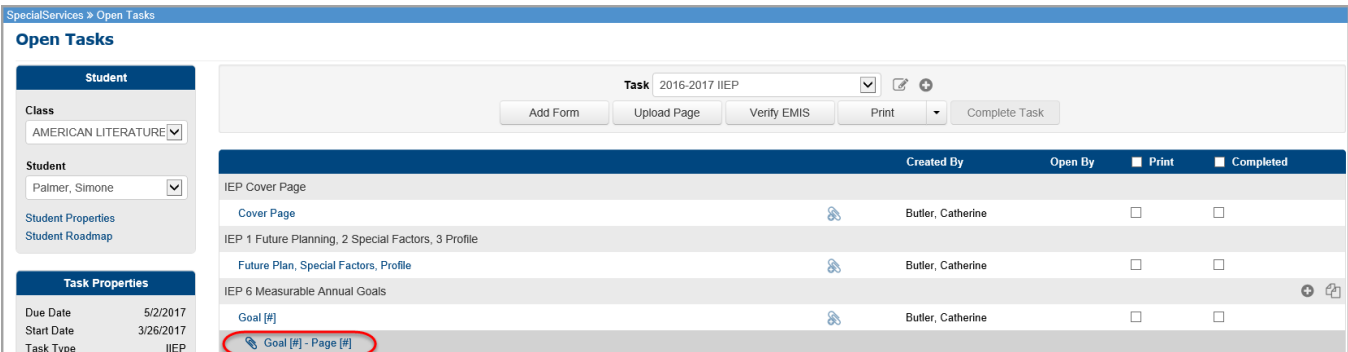
The **Add Attachments** window opens, listing the forms that can be attached to the page.



- Optional: To preview the form in a new window, click .
- Select the check box next to the name of the form you want to attach or click the name.
- Click **Add Attachments**.



**Note:** To navigate to and upload your own read-only PDF from this window, see [Uploading Pages](#).

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



**Note:** Attachments display alphabetically under a page. To change the order, assign names using numbers or letters to specify the desired sequence. All editable attachments (signified by ) display above read-only PDF attachments (signified by ).




# Uploading Pages

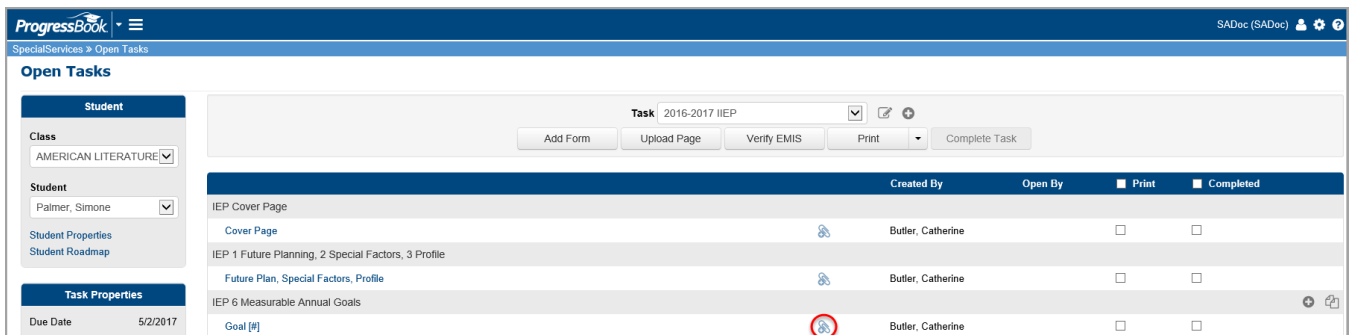
You can upload additional pages to a task, such as the signature page for an evaluation, an example of the student's work, or scanned pages from participants in the task who do not have access to SpecialServices. Any pages you wish to upload must be in PDF format no larger than 5 megabytes. Once they are uploaded, you can view but not edit these pages.

- To upload a read-only PDF to a specific task page, see [Uploading Pages to a Specific Task Page](#)
- To upload a read-only PDF to an overall task, see [Uploading Pages to an Overall Task](#)

## Uploading Pages to a Specific Task Page

Use this procedure when you want to attach read-only PDFs to a specific task page. If you want to attach read-only PDFs that are relevant to an overall task, see [Uploading Pages to an Overall Task](#). If you want to add an editable attachment to a task page, see [Adding Attachments](#).

1. On the **Open Tasks** screen, in the **Student** drop-down list, select the appropriate student.
2. In the **Task** drop-down list, select the appropriate task.
3. Next to the page to which you want to upload a PDF, click .



The screenshot shows the ProgressBook interface. The top navigation bar includes the ProgressBook logo and user information (SADoc (SADoc)). The main content area is titled 'Open Tasks' and shows a sidebar with 'Student' and 'Task Properties' sections. The 'Student' section is set to 'Palmer, Simone'. The 'Task' dropdown is set to '2016-2017 IIEP'. Below the sidebar is a table of tasks with columns for 'Created By', 'Open By', 'Print', and 'Completed'. The 'IEP 6 Measurable Annual Goals' row has a red circle around the upload icon.

Task	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>

The **Add Attachments** window opens.

4. Click in the **PDF File** field or click **Browse**; navigate to and select the PDF you want to upload.
5. In the **Page Name** field, enter the name you want to display on the **Open Tasks** screen for the uploaded page.

**Note:** Once you upload the page, you cannot change the name in *SpecialServices*. You must re-upload the page with the new name and delete the page with the incorrect name.

6. Click **Add Attachments**.

**Add Attachments**

Select attachment(s) to add

IEP Attachment Page (Additional)

General Attachment Page (Additional)

Page Name: 1 Goal PDF

PDF File: Documents\Goal PDF 1.pdf Browse...

Maximum upload file size: 10 MB

Add Attachments Close

**Note:** To select editable attachments from this window, see [Adding Attachments](#).

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

SpecialServices » Open Tasks

**Open Tasks**



Student: Palmer, Simone

Class: AMERICAN LITERATURE

Task: 2016-2017 IIEP

Buttons: Add Form, Upload Page, Verify EMIS, Print, Complete Task

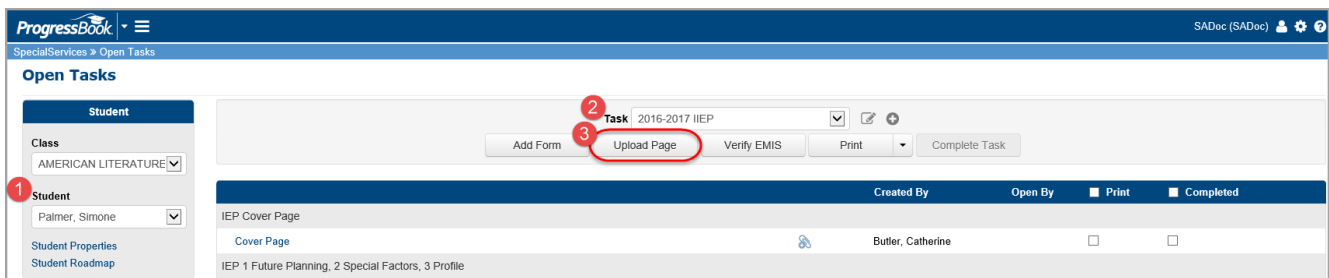
Task	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals				
Goal [f]	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Goal [f] - Page [f]				
1 Goal PDF				

**Note:** Attachments display alphabetically under a page. To change the order, assign names using numbers or letters to specify the desired sequence. All editable attachments (signified by ) display above read-only PDF attachments (signified by ).

## Uploading Pages to an Overall Task

Use this procedure when you want to attach read-only PDFs that are relevant to an overall task. If you want to attach pages that are relevant to a specific page of a task, see [Uploading Pages to a Specific Task Page](#).

1. On the **Open Tasks** screen, in the **Student** drop-down list, select the appropriate student.
2. In the **Task** drop-down list, select the appropriate task.
3. Click **Upload Page**.



4. On the **Upload Page** window, click in the **PDF File** field or click **Browse**; navigate to and select the PDF you want to upload.
5. In the **Page Name** field, enter the name you want to display on the **Open Tasks** screen for the uploaded page.

**Note:** Once you upload the page, you cannot change the name in *SpecialServices*. You must re-upload the page with the new name and delete the page with the incorrect name.

6. Click **Upload Form**.



The page displays under the **Uploaded Pages** heading on the **Open Tasks** screen. You can view the page by clicking its name.

SpecialServices » Open Tasks

### Open Tasks

**Student**

Class: AMERICAN LITERATURE

Student: Palmer, Simone

Student Properties

Student Roadmap

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**Task Properties**

Due Date: 5/2/2017

Start Date: 3/26/2017

Task Type: IIEP

Priority Task

Task: 2016-2017 IIEP

Add Form Upload Page Verify EMIS Print Complete Task

	Created By	Open By	Print	Completed
IIEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IIEP 1 Future Planning, 2 Special Factors, 3 Profile				
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IIEP 6 Measurable Annual Goals				
Goal [#]	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Goal [#] - Page [#]				
1 Goal PDF				
IIEP 7 Specialty Designed Services, 8 Transportation as Service				
Services	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IIEP 9 NonAcademic, 10 General Factors, 11 LRE				
NonAcademic, General Factors, LRE	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IIEP 12 Statewide and District Testing				
Testing	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IIEP 13 Meeting Participants				
Participants	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IIEP 14 Signatures				
Signatures	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Prior Written Notice				
Prior Written Notice	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Parent Invitation				
Parent Invitation	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Special Ed Events - IIEP				
Special Ed Events - IIEP	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
<b>Uploaded Pages</b>				
Upload Page 1			<input type="checkbox"/>	



# Deleting Pages, Forms, and Attachments

If you have the appropriate security privileges, you can delete pages, forms, and attachments from a task. You delete some items on the **Open Tasks** screen and others on the **Page Edit** screen. Refer to the appropriate topic:

- To delete cover pages from a task, see [Deleting Task Pages](#)
- To delete additional forms from a task, see [Deleting Added Forms](#)
- To delete read-only PDF attachments, see [Deleting Uploaded Pages](#)

## Deleting Task Pages

If you have the appropriate security privileges, you can delete pages and attachment pages from a task. When you delete a page with an attachment, the attachment page is deleted automatically; you can also delete individual attachment pages.

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

	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>

The selected page opens on the page edit screen.

2. In the toolbar at the top of the screen, click **Delete**.

Page Name: Goal [#] - Page [#] Save Name

Print Options Delete Close

Check Spelling Print & Save Save & Close Save Form

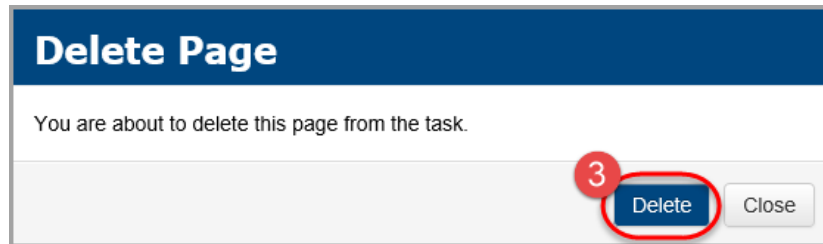
IEP Individualized Education Program SADoc Simone Palmer

CHILD'S INFORMATION NAME: Simone Palmer ID NUMBER: 4301011 DATE OF BIRTH: 12/17/2002

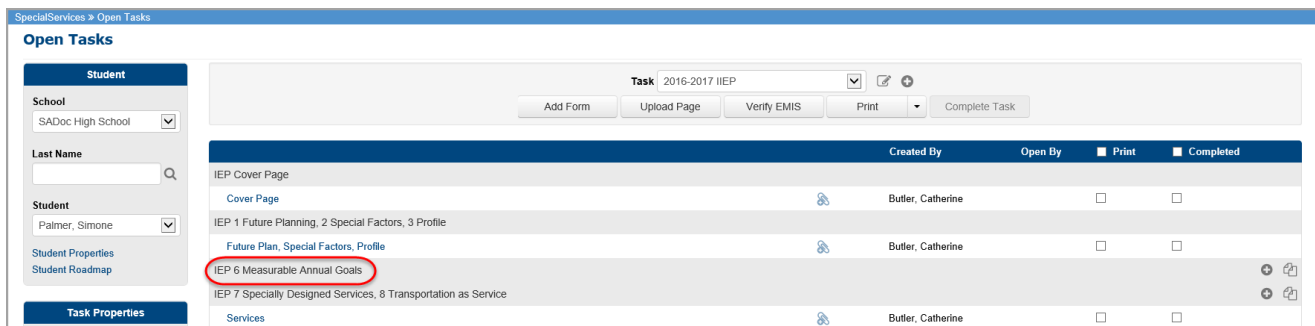
CONTINUATION OF




The **Delete Page** confirmation window opens.

3. If you are certain you want to delete the page (and all of its associated attachments), click **Delete**.




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

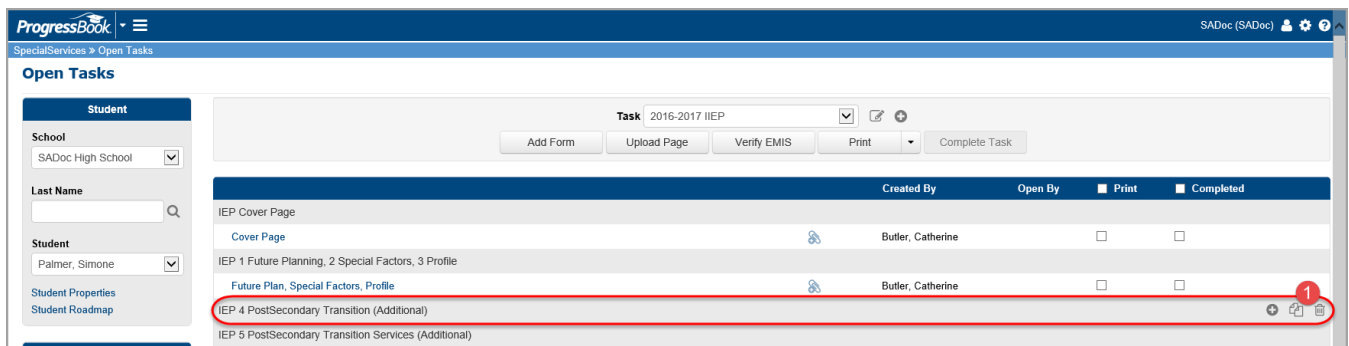



**Note:** If the page you deleted was the only page for a required form,  and  display so that you can add a new page. If the page was for an added form and you have the appropriate security privileges, you can delete the form from the task by clicking  (see [Deleting Added Forms](#)).

## Deleting Added Forms

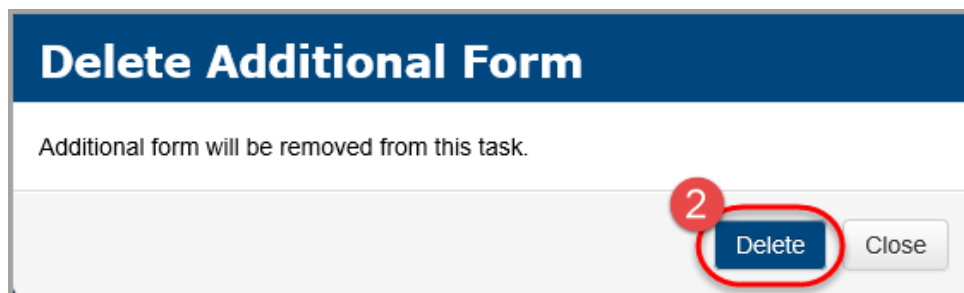
Users with the appropriate security privileges can delete added forms from the task. Before you can delete an added form, you must first delete all pages that have been created for the form. See [Deleting Task Pages](#). If pages have already been deleted or no pages have been created for the form you want to delete,  displays in the row of the form.

1. With the task displayed on the **Open Tasks** screen, in the row of the form you want to delete, click  .



	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile				
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 4 PostSecondary Transition (Additional)				
IEP 5 PostSecondary Transition Services (Additional)				

2. On the **Delete Additional Form** window, click **Delete**.

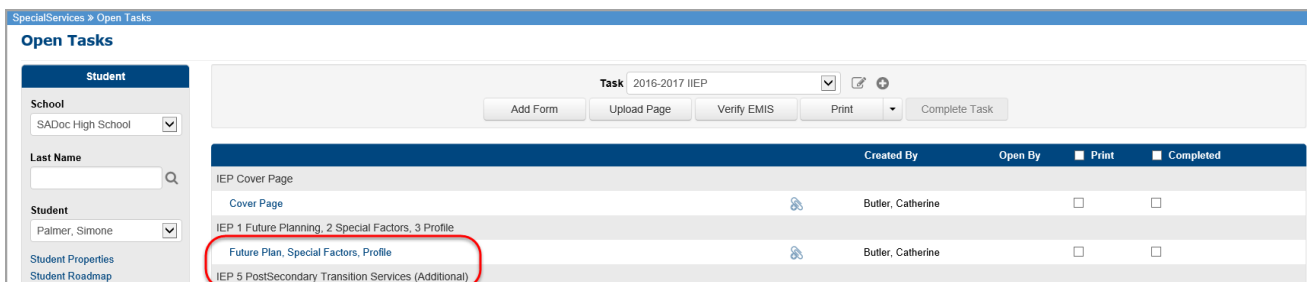


**Delete Additional Form**

Additional form will be removed from this task.

**Delete** Close

The **Open Tasks** screen displays, and the form you selected to delete no longer displays in the list of forms for the task.





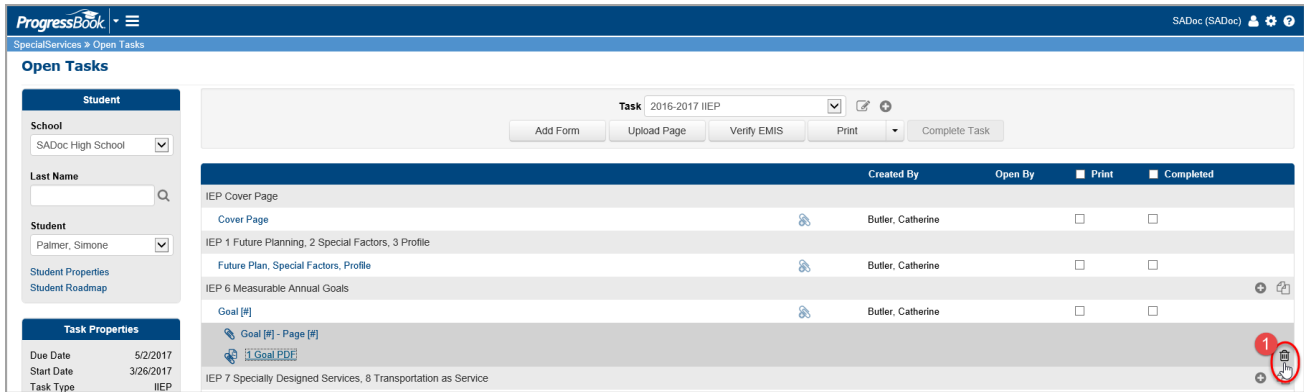
	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile				
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 5 PostSecondary Transition Services (Additional)				

## Deleting Uploaded Pages

Whether you uploaded a read-only PDF to a specific task page or to an overall task, there are two ways you can delete this type of attachment on the **Open Tasks** screen.

1. With the task displayed on the **Open Tasks** screen, do one of the following:

- Locate an attachment to a specific task page (signified by  preceding the attachment name) and click  at the end of the row



ProgressBook SpecialServices > Open Tasks SADoc (SADoc)


**Open Tasks**

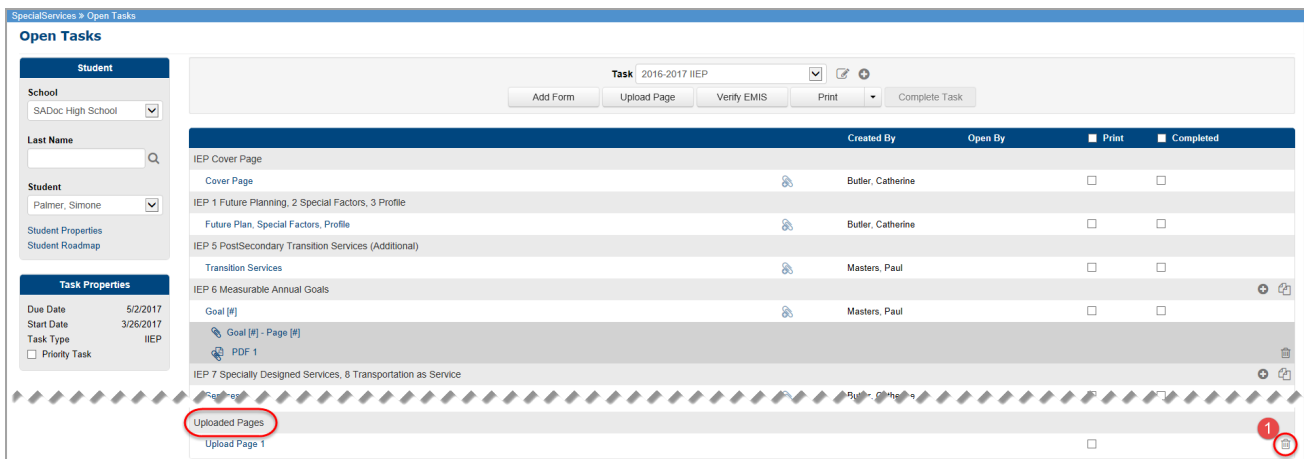
Student: SADoc High School

Task: 2016-2017 IIEP

Buttons: Add Form, Upload Page, Verify EMIS, Print, Complete Task

	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Future Plan, Special Factors, Profile				
IEP 6 Measurable Annual Goals				
Goal [#]	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Goal [#] - Page [#]				
Goal PDF				
IEP 7 Specialty Designed Services, 8 Transportation as Service				

- Under the **Uploaded Pages** heading, in the row of the attachment you want to delete, click 



ProgressBook SpecialServices > Open Tasks SADoc (SADoc)

**Open Tasks**

Student: SADoc High School

Task: 2016-2017 IIEP

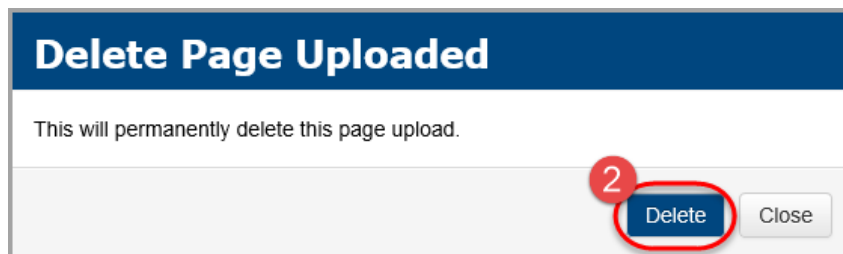
Buttons: Add Form, Upload Page, Verify EMIS, Print, Complete Task

	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
Future Plan, Special Factors, Profile				
IEP 5 PostSecondary Transition Services (Additional)				
Transition Services	Masters, Paul		<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals				
Goal [#]	Masters, Paul		<input type="checkbox"/>	<input type="checkbox"/>
Goal [#] - Page [#]				
PDF 1				
IEP 7 Specialty Designed Services, 8 Transportation as Service				

**Uploaded Pages**

Upload Page 1			<input type="checkbox"/>	
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2. On the **Delete Additional Form** window, click **Delete**.



**Delete Page Uploaded**

This will permanently delete this page upload.

2 Delete Close



# Printing Student Forms

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

The pages are merged in the order in which they display on the **Open Tasks** screen. To change the order in which the pages display in the printed document, you must rename the pages. See **Renaming Pages** in the *ProgressBook SpecialServices Editing Tasks Training Guide*.

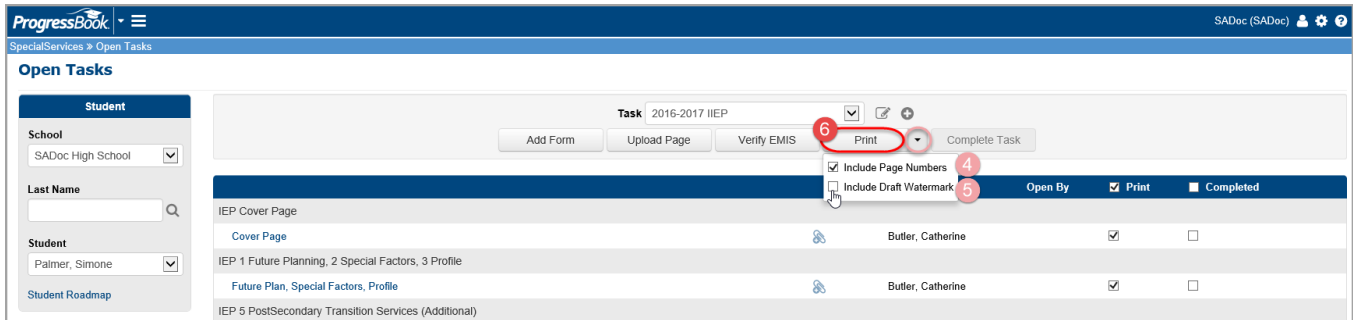
**Note:** You cannot print a page if it is locked by another user. For more information about locked pages, see the **Locking Pages** section of the ProgressBook SpecialServices Editing Tasks Training Guide.

1. On the **Open Tasks** screen, in the **Student** drop-down list, select the student for whom you want to print forms.
2. In the **Task** drop-down list, select the task that contains the forms you want to print.
3. Select which form(s) to print:
  - To print specific pages, in the row of each page you want to print, select the **Print** check box
  - To print all of the pages, select the **Print** check box in the column header

The screenshot shows the ProgressBook interface for 'Open Tasks'. On the left, there are filters for 'Student' (Palmer, Simone) and 'Task Properties' (Due Date: 5/2/2017, Start Date: 3/26/2017, Task Type: IIEP). The main area displays a table of tasks for '2016-2017 IIEP'. The table has columns for 'Created By', 'Open By', 'Print', and 'Completed'. The 'Print' column has checkboxes for each row, and a red circle highlights this column header. Another red circle highlights the 'Task' dropdown menu, and a third red circle highlights the 'Print' checkboxes for the first three rows.

	Created By	Open By	Print	Completed
IEP Cover Page			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cover Page	Butler, Catherine		<input checked="" type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile	Butler, Catherine		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Future Plan, Special Factors, Profile			<input checked="" type="checkbox"/>	<input type="checkbox"/>
IEP 5 PostSecondary Transition Services (Additional)			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Transition Services	Masters, Paul		<input checked="" type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Goal [#]	Masters, Paul		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Goal [#] - Page [#]				
PDF 1				

- Optional: If you do not want page numbers to print on the forms, in the **Print** drop-down list, de-select the **Include Page Numbers** check box.
- Optional: If you want to print the forms with a watermark of the word "Draft," in the **Print** drop-down list, select the **Include Draft Watermark** check box.
- Click **Print** to download the selected pages in a single PDF document.



- Open the document and select print in your PDF viewer.
- Optional: Save the merged document to a location of your choice on your local computer.



# Verifying EMIS

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

**Note:** To view the EMIS Data Collection Form for a completed task, you must run the EMIS Review Report. See the ProgressBook SpecialServices EMIS Training Guide.

1. On the **Open Tasks** screen, in the **Student** drop-down list, select the student for whom you want to view the EMIS Data Collection Form.
2. In the **Task** drop-down list, select a task.
3. Click **Verify EMIS**.

**Note:** The **Verify EMIS** button is only enabled if the task contains information that is reportable to EMIS.

Task	Created By	Open By	Print	Completed
IEP Cover Page				
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile				



