ProgressBook SpecialServices Administrator Guide

SpecialServices

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(This document is current for v20.4.0 or later.)

Change Log

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

Product Version	Heading	Page	Reason
20.4.0	*"District Configuration"*	23	Updated screenshot and text to reflect the removal of the **Data Integration Fields** setting and the addition of the **Data Integration** setting.
20.2.0	*"Case Management"*	30	Updated text and screenshots to reflect addition of the **Search Caseloads** field.
N/A	*"District Configuration"*	23	Added note to indicate that you must enable the **Import From Document** setting in addition to the **Banks** setting in order for banks to be available to all applicable users.
20.1.1	*"District Configuration"*	23	Updated text and screenshot to reflect addition of the **Data Integration Fields** setting.
20.1.0	*"Setting Up Security"*	6	Updated text and screenshots to reflect the new security terminology and processes in StudentInformation.
20.1.0	*"Creating Additional Roles"*	19	Updated text and screenshots to reflect the addition of building-level security in SpecialServices.
20.1.0	*"Configuring Building-Level Security"*	20	Added section.
20.1.0	*"EMIS Extract Records"*	37	Updated text to reflect that the EMIS extract now includes information only from documents marked with **Include in EMIS** in SpecialServices.
20.1.0	Entire Guide	N/A	Updated screenshots to reflect that headers, backgrounds, and some styling in DataMap, CentralAdmin, and StudentInformation have been updated to match the Frontline color scheme and styling.
20.0.0	Entire Guide	N/A	Created guide.

Table of Contents

Welcome to SpecialServices

The purpose of this guide is to assist ProgressBook SpecialServices administrators in setting up and maintaining their SpecialServices system. The sections in this guide provide procedural information about setting up security, configuring your district's settings, creating district banks, and managing caseloads. Additionally, this guide provides the procedures for transferring student documents into your district and creating an EMIS extract that can be imported into StudentInformation and reported to ODE.

- *"Accessing SpecialServices"*
- *"Finding the Information You Need"*
- *"Navigating SpecialServices"*

Accessing SpecialServices

You can access SpecialServices in any of the following ways:

- To access SpecialServices from another ProgressBook application, on the banner, click
  ▼. Then, click the SpecialServices logo to open the SpecialServices **Dashboard** screen.

- If you are not already logged in to ProgressBook CentralAdmin or if your district provides standalone access to SpecialServices via URL, you must log in (see *"Logging In to SpecialServices"*).

Logging In to SpecialServices

You can log in to SpecialServices on the ProgressBook login screen.

1. In a web browser, enter the URL provided by your district.

   The ProgressBook login screen displays.

2. In the **Domain** drop-down list, select your domain.

3. Enter your **Username** and **Password** in the appropriate fields.

4. Click **Sign In**.

The SpecialServices **Dashboard** screen displays.

*Note: For more information on the **Dashboard** screen, see the* ProgressBook SpecialServices User Guide.

Logging Out of SpecialServices

To log out of SpecialServices, on the banner, click . Then, click **Sign out**.

You are logged out of all ProgressBook applications, and the ProgressBook logout screen displays.
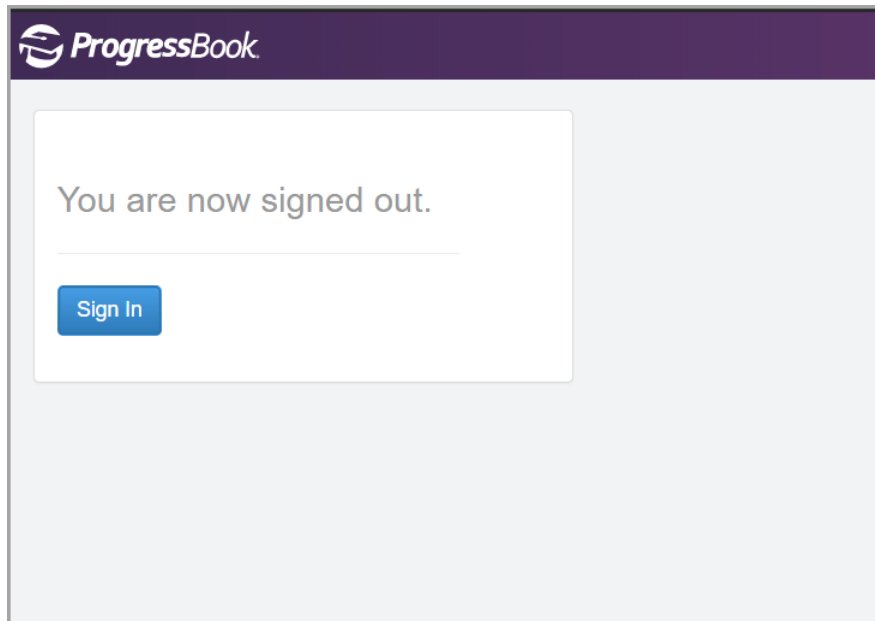
Automatic Logout

To prevent unauthorized use, users are automatically logged out of ProgressBook after a period of inactivity, a length of time that you can define in CentralAdmin. The time calculating inactivity resets each time a user performs an action anywhere in ProgressBook. Once automatic logout occurs, the CentralAdmin login screen displays and the user must log in again to continue working.

> ***Note:*** *For more information on how to set the user session timeout period, see the* ProgressBook CentralAdmin User Guide*.*

Finding the Information You Need

The following sources of information are available to help you use SpecialServices:

- **Tooltips** – To view the description of a button or symbol, hover your cursor over the icon.

- **WebHelp** – Click on the top-right corner of any screen to view ProgressBook WebHelp (see *"Using SpecialServices WebHelp"*).

Using SpecialServices WebHelp

To view SpecialServices WebHelp, on the banner, click .

SpecialServices WebHelp opens. You can use WebHelp in the following ways:

- Browse the table of contents for specific topic titles.

- In the index ( ), in the **Filter Keywords** field, enter keywords to search for information. Or, select keywords from the list that displays below the field.

- In the **Search** field, enter a word or phrase to return a list of possible help topics.

- On the glossary tab ( ), view a list of terms and their definitions.
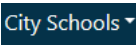
Navigating SpecialServices

- *"Understanding the Banner"*
- *"Following Breadcrumbs"*
- *"Navigating to Other Screens"*
- *"Navigating to Other ProgressBook Applications"*

Understanding the Banner

The banner at the top of every screen in SpecialServices lets you perform the following functions:

Icon	Function
	Click to return to the **Dashboard** screen.
	Click to expand or collapse the left navigation menu that lets you navigate to other screens in DataMap (see *"Navigating to Other Screens"*).
City Schools	Displays the school district in context. If you have access to multiple districts, click to open a drop-down list that lets you switch districts.
	Notification functionality available in a future release.
	Click to open a drop-down list that lets you view your recently run reports or view the StudentInformation Analytics Hub. (For more information, refer to the *ProgressBook StudentInformation Analytics Hub Guide.)*
	Click to open a drop-down list that displays your username and lets you change your password or log out (see *"Logging Out of SpecialServices"*).
	Click to view SpecialServices WebHelp (see *"Using SpecialServices WebHelp"*).

Following Breadcrumbs

A breadcrumb trail displays below the banner on every screen to help you track your location in SpecialServices. When you hover your cursor over a breadcrumb, if an underline displays below it, the breadcrumb is a clickable link. Click the breadcrumb to go directly to that screen.
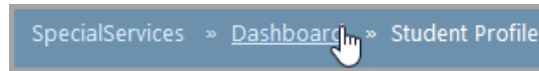
Navigating to Other Screens

To navigate to other screens in SpecialServices, on the banner, click ☰ to expand the left navigation menu. Then, click the name of the screen you want to access.
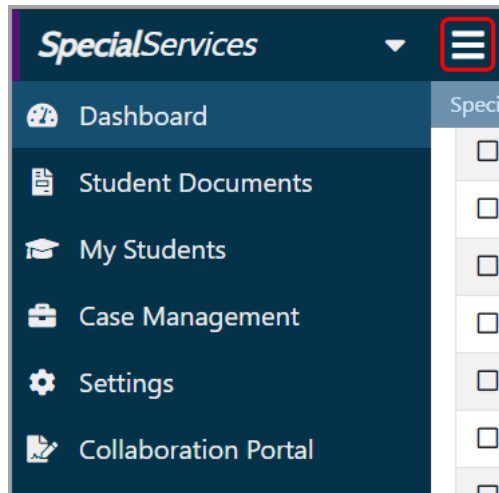
Navigating to Other ProgressBook Applications

You can use the application quick launch menu to navigate to any ProgressBook applications you are authorized to use.

1. On the banner, beside the ProgressBook logo, click ☰.

2. When the left navigation menu expands, click ▼.

   In the application quick launch menu that displays, click the name of the application you want to access.
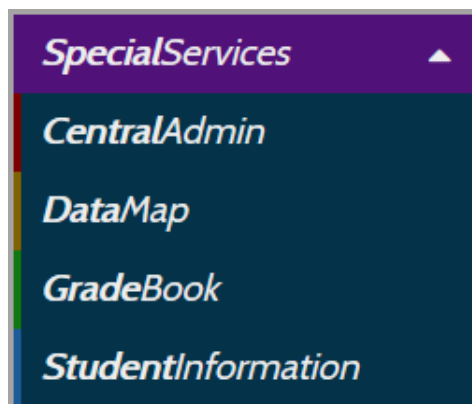
Setting Up Security

SpecialServices defines 4 roles that determine the type of access accounts can have within the application. Each role has preset resource permissions that should not be modified. However, you can create any number of additional roles with different resource permissions based on the needs of your district. For example, you can create additional roles for accounts to which you want to grant building-level security privileges. All SpecialServices roles are assigned in StudentInformation.

- *"SpecialServices Roles"*
- *"Assigning a Role to an Individual Account"*
- *"Assigning a Role to Multiple Accounts"*
- *"Creating Additional Roles"*
- *"Configuring Building-Level Security"*

SpecialServices Roles

In StudentInformation, you can assign any of the 4 preset SpecialServices roles at the district level to an individual account (see *"Assigning a Role to an Individual Account"*) or to multiple accounts (see *"Assigning a Role to Multiple Accounts"*).

> *Note: For information on creating additional roles, see "Creating Additional Roles."*

Role	Privileges
SpecialServices - Administrator	• Can access the **Dashboard** screen, the **Student Documents** screen (including the **Documents**, **Banks**, and **Recycle Bin** tabs), the **My Students** screen, the **Case Management** screen, the **Settings** screen (which houses the **District Configuration** and **Document Import** screens), and the Collaboration Portal • (**Dashboard** screen and **Student Documents** screen **Documents** tab) Can access all special education documents for all students within the district • Can search for and create documents for any student within the district
SpecialServices - Case Manager	• Can access the **Dashboard** screen, the **Student Documents** screen (including the **Documents** and **Recycle Bin** tabs), the **My Students** screen, and the Collaboration Portal • (**Dashboard** screen and the **Student Documents** screen **Documents** tab) Can access documents only for the students in their caseload or for whom they provide a service within the district • Can search for and create documents for any student within the district

Role	Privileges
SpecialServices - Service Provider	• Can access the **Dashboard** screen, the **Student Documents** screen (including the **Documents** and **Recycle Bin** tabs), the **My Students** screen, and the Collaboration Portal • (**Dashboard** and **Student Documents** screen **Documents** tab) Can access documents only for the students to whom they provide a service within the district • Can search for and create documents for students only to whom they provide a service within the district
SpecialServices - General Education	• Can access the **Dashboard** screen, the **Student Documents** screen **Documents** tab, the **My Students** screen, and the Collaboration Portal • (**Dashboard** and **Student Documents** screen **Documents** tab) has view-only access to IEPs and PRs as well as view/update access to ETRs for students in their class(es) within the district • Can search for students in their class(es) within the district

Assigning a Role to an Individual Account

Navigation: StudentInformation > Management > Security > View Accounts

1. On the StudentInformation **View Accounts** screen, enter information in any of the search fields to find the account that you want to assign a SpecialServices role.

2. Click **Search**.

View Accounts

Last Name:	Spencer	First Name:	
Email Address:			

Username:		Domain:	⌄
Administrative School:	Example District ⌄	Default School:	⌄
Active:	☑		

Search

New Account

3. In the results grid that displays, in the row of the appropriate account, click ✏.

The user record screen **Account** tab displays.

4. At the bottom of the screen, on the **Roles** subtab, in the **School** drop-down list, select the district or school to which the role grants access.

   Note: The 4 preset SpecialServices roles do not offer building-level security. For information on granting building-level privileges to accounts, see "Configuring Building-Level Security."

5. In the **Role** drop-down list, select the desired SpecialServices role.

6. Click **Add Role**.

The role now displays in the grid and is assigned to the account.

Note: To remove a role from an account, in the row of the role you want to remove, click 🗑.

Assigning a Role to Multiple Accounts

Navigation: StudentInformation > Management > Security > Assign Role to Accounts

1. On the StudentInformation **Assign Role to Accounts** screen, in the **School** drop-down list, select the district or school to which the role grants access.

   Note: The 4 preset SpecialServices roles do not offer building-level security. For information on granting building-level privileges to accounts, see "Configuring Building-Level Security."

2. In the **Role** drop-down list, select the desired SpecialServices role.

3. Click **Search**.

*Note: You can search for specific accounts by entering account information in the search fields. Use * as a wildcard before, after, or in between keywords to narrow your search results. This search is not case sensitive.*

In the dual listbox that displays, a list of available accounts displays in the **Available** listbox, and a list of accounts that have already been assigned the selected role displays in the **Assigned** listbox.

4. In the **Available** listbox, select the accounts you want to assign the selected role, and then click ➡ to move them to the **Assigned** listbox. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrow icons to move accounts between the 2 listboxes.)

5. Click **Save Assigned Accounts**.

The dual listbox closes, the role is assigned to the selected accounts, and a success message displays.

Role Resource Permissions

Navigation: StudentInformation > Management > Security > View Roles > Add New Role button or View Details icon > Edit Resource Permissions button

Resource permissions determine the privileges associated with each SpecialServices role. If you have the appropriate security privileges in StudentInformation, you can access these permissions from the StudentInformation **View Roles** screen.

- *"Viewing Resource Permissions"*
- *"Access Settings"*
- *"Resource Permission Features"*
- *"Preset Resource Permissions Per Role"*

Viewing Resource Permissions

> *Note: To view and/or modify resource permissions for additional roles, see "Creating Additional Roles."*

1. On the StudentInformation **View Roles** screen, in the **School** drop-down list, select the district for which you want to view a preset SpecialServices role.

2. In the **Role Name** field, enter *SpecialServices*. Then, click **Search**.

The SpecialServices roles display.

3. In the row of the role for which you want to see resource permissions, click ✏.

    The **Security - Role: [Role Name]** screen displays.

4. Click **Edit Resource Permissions**.
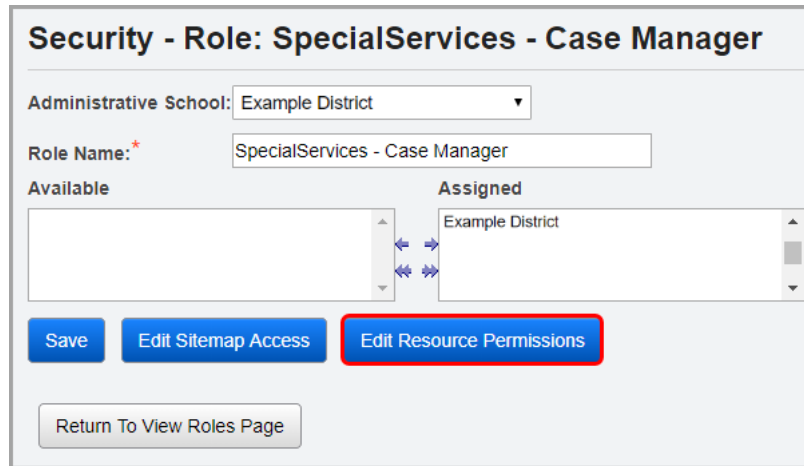
    The **Edit Permissions for [Role Name]** screen displays.

5. Click the **SpecialServices** tab.

    The SpecialServices resource permissions for the selected role display.

Access Settings

⚠ **Caution:** *It is not recommended that you modify the access settings for the 4 preset SpecialServices roles (see* "SpecialServices Roles" *). For information on creating additional roles that you can customize to meet the needs of your district, see* "Creating Additional Roles."

SpecialServices resource permissions display with up to 6 access settings beside each node (**Allow**, **View**, **Create**, **Update**, **Delete**, and **Complete**). The SpecialServices resources display alphabetically within each level of the hierarchy. Access for a resource can be toggled among Enabled, Disabled, and Neutral. You can also see hierarchical access for items that are not expanded (Enabled below, Disabled below).

*   Enabled ☑ – Indicates that the user with this role can access, view, or modify features within this resource or all features nested below this resource.

*   Enabled below ☑ – Indicates that the user with this role can access, view, or modify items within at least one feature nested below this resource.

*   Disabled ✖ – Indicates that the user with this role cannot access, view, or modify items within this feature nor the features nested below this resource.

*   Disabled below ✖ – Indicates that the user with this role cannot access, view, or modify items within at least one feature nested below this resource.

- Neutral [✓ ✗] – Indicates that access is neither allowed nor restricted for this resource.

   Note: The nodes can be expanded or collapsed by using ▾ and ▸ to the left of the nodes.

   *Note: Once you have enabled or disabled access to particular features for a role, make sure you click **Save Permissions**.*

Resource Permission Features

SpecialServices resource permissions are composed of features that determine which screens a user can access and the actions a user can take within the application. These features are categorized as *"Admin," "Case Management," "Documents,"* or *"Student Search."*

Admin

▾ Admin			
District Banks	Create : [✓ ✗]	Update : [✓ ✗]	Delete : [✓ ✗]
District Configuration	Allow : [✓ ✗]		
Document Import	Allow : [✓ ✗]		

- **District Banks** – Controls the user's access to the **Student Documents** screen **Banks** and their ability to **Create**, **Update**, and/or **Delete** district bank items on this tab.
- **District Configuration** – Controls the user's access to the **District Configuration** screen and their ability to enable or disable district settings on this screen.
- **Document Import** – Controls the user's access to the **Document Import** screen and their ability to import documents for transfer students on this screen.

Case Management

▾ Case Management	Allow : [✓ ✗]
Self Assign Case Manager	Allow : [✓ ✗]
Self Assign Service Provider	Allow : [✓ ✗]

- **Case Management** – Controls the user's access to the **Case Management** screen.
  - **Self Assign Case Manager** (**My Students** screen) – Controls the user's ability to assign themselves as a case manager for a caseload.
  - **Self Assign Service Provider** (**My Students** screen) – Controls the user's ability to assign themselves as a service provider for a student.

Documents

- **All Student Access** (**Dashboard** screen and the **Student Documents** screen **Documents** tab) – Controls whether the user can view all special education documents for all students within the district or documents only for the students assigned to them.

- **Completed** (**Dashboard** screen and the **Student Documents** screen **Documents** tab) – Controls the user's ability to **View** and/or **Delete** all completed special education documents.

  - **504 Plan**; **BIP**; **ETR**; **IEP**; **Other**; **PR**; **SP**; **WAP**; **WEP** (**Dashboard** screen and the **Student Documents** screen **Documents** tab) – Controls the user's ability to **View** and/or **Delete** each type of completed special education document.

- **Open** (**Dashboard** screen and the **Student Documents** screen **Documents** tab) – Controls the user's ability to **View**, **Create**, **Update**, **Delete**, and/or **Complete** all open special education documents.

  Note: Users who can complete documents can also send documents to the desired recipients for review via the Frontline Collaboration Portal. For more information on sending documents for review, see the "Sending a Document for Review via the Frontline Collaboration Portal" *section of the* ProgressBook SpecialServices User Guide.

- **504 Plan**; **BIP**; **ETR**; **IEP**; **Other**; **PR**; **SP**; **WAP**; **WEP** (**Dashboard** screen and the **Student Documents** screen **Documents** tab) – Controls the user's ability to **View** and/or **Update** each type of open special education document.

    *Note: Users with **Update** permissions for at least one document type can access the Collaboration Portal from SpecialServices. All 4 preset SpecialServices roles have **Update** permissions for at least one document type. If you want to disable access to the Collaboration Portal, you can create an additional role and set all **Update** permissions to ✓ ✗ or ✗ for that role (see "Creating Additional Roles").*

Student Search

- **All Student Access** – Controls whether the user can search for and create documents for any special education student within the district or only for the students assigned to them.

Preset Resource Permissions Per Role

Administrator Resource Permissions

Case Manager Resource Permissions

Service Provider Resource Permissions

General Education Resource Permissions

Creating Additional Roles

Navigation: StudentInformation > Management > Security > View Roles

You can create additional SpecialServices roles (i.e., supplemental to the 4 preset SpecialServices roles) with unique resource permissions to fit the needs of your district.

1. On the StudentInformation **View Roles** screen, click **Add New Role**.

The **Security - Role** screen displays.

2. On the **Security - Role** screen, in the **Administrative School** drop-down list, select the ITC, district, or building that should have access to edit this role.

3. Enter a **Role Name** in the field.

4. In the **Available** listbox, select building(s) and/or district(s) to which the role should have access, and then click ➡ to move them to the **Assigned** listbox. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrow icons to move selections between the 2 listboxes.)

5. Click **Save**.

A success message displays, and the screen title updates to **Security - Role: [role name]**.

6. On the **Security - Role [role name]** screen, click **Edit Resource Permissions**.

The **Edit Permissions for [role name]** screen **Reports** tab displays.

7. Click the **SpecialServices** tab.

8. Modify the resource permissions as desired (see *"Resource Permission Features"*).

   Note: Only the following features and resource permissions can be enabled at the building level:

   - *All Student Access resource permission for the Documents feature (see "Documents")*
   - *All Student Access resource permission for the Student Search feature (see "Student Search")*
   - *Case Management feature (including the Self Assign Case Manager and Self Assign Service Provider resource permissions) (see "Case Management")*

9. Click **Save Permissions**.
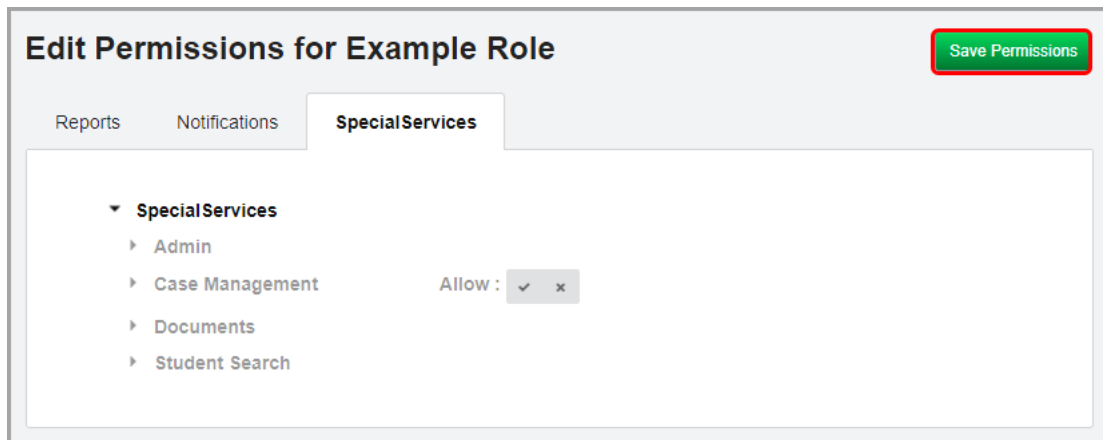
You can now assign this SpecialServices role to any account that has access to the selected building(s) and/or district(s).

Configuring Building-Level Security

Note: Only users with appropriate security privileges in StudentInformation can configure building-level security. All building-level security is configured in StudentInformation.

You can grant building-level security privileges to one or more accounts for the following SpecialServices features and permissions:

- **All Student Access** resource permission for the **Documents** feature (see *"Documents"*)
- **All Student Access** resource permission for the **Student Search** feature (see *"Student Search"*)
- **Case Management** feature (including the **Self Assign Case Manager** and **Self Assign Service Provider** resource permissions) (see *"Case Management"*)

All accounts to which you want to grand building-level security privileges should be assigned both a district-level role and at least one building-level role. You need to create these roles, as the 4 preset SpecialServices security roles do not offer building-level security privileges.

- *"Creating and Assigning a District-Level Role"*
- *"Creating and Assigning a Building-Level Role"*

Creating and Assigning a District-Level Role

1. Complete the steps for creating an additional role (see *"Creating Additional Roles"*), ensuring the following:

   - In the **Administrative School** drop-down list, select the district that should have access to edit the role.

   - In the **Role Name** field, enter a role name that indicates that the role is a district-level role.

   - In the dual listbox, move the applicable district from the **Available** listbox to the **Assigned** listbox.

   - After saving the role, on the **Edit Resource Permissions for [role name]** screen **SpecialServices** tab, set all resource permissions that the role should have at the district level to ☑ or ☑.

   - Set all resource permissions for which you want to grant building-level privileges to ☑ ☒ (see *"Creating and Assigning a Building-Level Role"*).

2. To assign this role to an individual account, see *"Assigning a Role to an Individual Account."* To assign this role to multiple accounts, see *"Assigning a Role to Multiple Accounts."*

Creating and Assigning a Building-Level Role

1. Complete the steps for creating an additional role (see *"Creating Additional Roles"*), ensuring the following:

   - In the **Administrative School** drop-down list, select the district that should have access to edit the role.

   - In the **Role Name** field, enter a role name that indicates that the role is a building-level role.

- In the dual listbox, move the applicable school(s) from the **Available** listbox to the **Assigned** listbox.

- After saving the role, on the **Edit Resource Permissions for [role name]** screen **SpecialServices** tab, set the resource permissions that the role should have at the building level to ☑ or ☑.

  Note: When creating building-level roles, you can either create 1 role that enables all resource permissions for which you want to grant building-level privileges, or you can create individual roles for each resource permission for which you want to grant building-level priviliges. Creating individual roles for each resource permission allows for greater flexibility in how building-level privileges can be assigned.

- Set all resource permissions for which district-level privileges have been granted to ☑ ☒ (see *"Creating and Assigning a District-Level Role"*).

2. To assign this role to an individual account, see *"Assigning a Role to an Individual Account."* To assign this role to multiple accounts, see *"Assigning a Role to Multiple Accounts."*

District Configuration

Navigation: SpecialServices > Settings > District Configuration

The **District Configuration** screen lets you enable or disable specific features in SpecialServices to fit the needs of your district. All district configuration settings except the **Data Integration** setting are enabled by default.

> *Note: Any changes you make on this screen are saved automatically.*

To access the **District Configuration** screen, in the left navigation menu, click **Settings**. Then, on the **Settings** screen, click **District Configuration**.

The **District Configuration** screen displays.

- **Banks** – Enables/disables ability to create and use banks.

  *Note: You must also enable the **Import From Document** setting (see below) in order for banks to be available to all applicable users.*

- **Copy From Previous Document** – Enables/disables ability to create a new document using data from an existing document.

- **Import From Document** – Enables/disables ability to copy and paste information from one document into the current document.

- **Electronic Signatures** – Enables/disables ability to sign documents with an electronic signature.

- **Collaboration Portal** – Enables/disables ability to send documents to the desired recipients for review via the Frontline Collaboration Portal. Recipients can then sign and/or annotate the document as necessary.

- **Data Integration Fields** – Enables/disables the creation of nightly extracts for Transportation, Service Lines, Plan, Goals, Medicaid Parental Consent, and Objectives. Also enables/disables the **Sessions** field, **Period** drop-down list, and **Duration** field in the **Specially Designed Instruction** and **Related Services** sections of the **Specially Designed Services** form for IIEPs, AIEPs, IISPs, and RISPs.

  Note: This setting should be enabled only if your district plans to transition to Frontline Service and Plan Management.

- **Medicaid Parental Consent** – Enables/disables the **Medicaid Parental Consent** form as a required form for IEPs and ETRs.
- **Medicaid Organization** – Enter the name of your district's Medicaid organization in the field. The default value is **Healthcare Bill Services, Inc.**
- **Medicaid Phone Number** – Enter the phone number for your district's Medicaid organization in the field. The default phone number is **(740) 639-4218**.

District Banks

You can set up and maintain banks of commonly used phrases and make these banks available to users in the district to reuse on their forms.

- *"Creating District Bank Items"*
- *"Editing District Bank Items"*
- *"Deleting District Bank Items"*

Creating District Bank Items

> *Note: Banks are unavailable for some fields.*

1. On the **Student Documents** screen **Banks** tab, click **New Bank**.
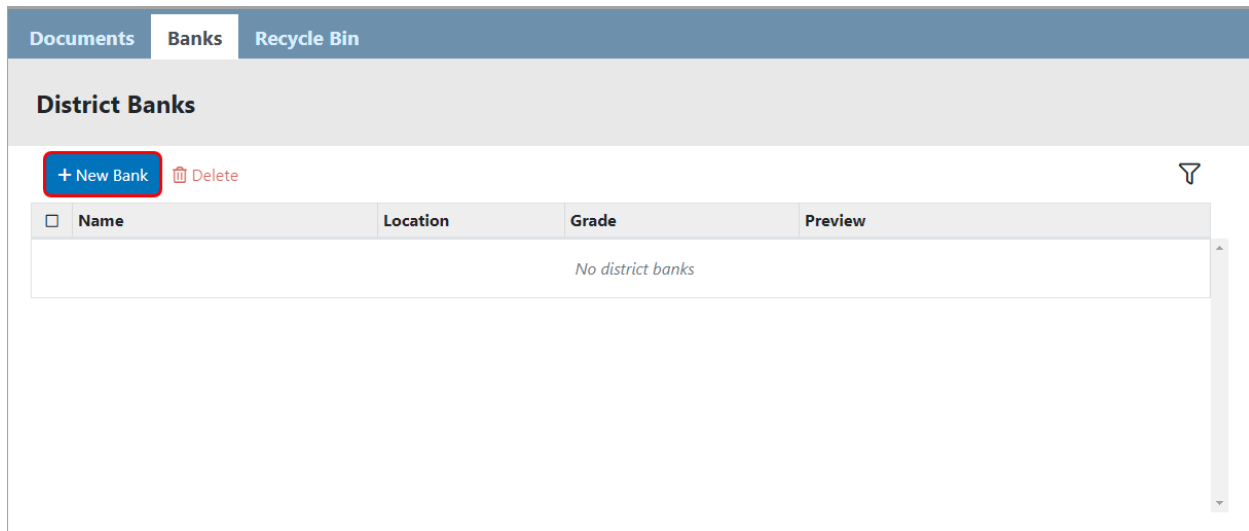
At the bottom of the screen, the **District Banks** area displays.

2. In the drop-down list, select the **Document** for which you want to create a district bank item.

3. In the appropriate drop-down lists, select the document **Section** and **Location** to which this district bank item applies.

> ⚠️ *Caution: Once you select a **Location** and create the district bank item, the **Location** is no longer editable. Make sure that you have selected the correct **Location** before proceeding.*

> *Note: Selecting a **Section** and **Location** lets you use the district bank item in multiple fields across multiple documents. For example, an **Annual Goal** bank item can be used on the **Measurable Annual Goals** form in the **Measurable Annual Goal** field for IEPs as well as on the **Measurable Annual Goals** form in the **Measurable Annual Goal** field for SPs.*

4. (Optional) In the **Grades** drop-down list, select the grade levels to which this district bank item applies. All grade levels are selected by default.

5. Enter a **Bank Name**.

6. In the rich-text field, enter the desired content for the bank item.

   Note: You can use predefined text replacements as shortcuts that automatically add the correct value to a field depending on the name and gender of the student. For more information, see "Bank Codes."

7. Click **Create**.

The **District Banks** area closes, and the new district bank displays in the grid.

Bank Codes

Code	Text Inserted	Input Example	Output Example
#first#	Student's first name	**#first#** will make accurate measurements using appropriate tools and technology.	**Sandra** will make accurate measurements using appropriate tools and technology.
#he/she#	Lowercase "he" or "she"	When **#he/she#** is evidencing stress, #first# will initiate appropriate interactions without modeling or prompts.	When **she** is evidencing stress, Sandra will initiate appropriate interactions without modeling or prompts.
#He/She#	Mixed case "He" or "She"	**#He/She#** will make accurate measurements using appropriate tools and technology.	**She** will make accurate measurements using appropriate tools and technology.
#him/her#	Lowercase "him" or "her"	#first# is able to answer direct questions when they are signed and spoken to **#him/her#**.	Sandra is able to answer direct questions when they are signed and spoken to **her**.

Editing District Bank Items

1. On the **Student Documents** screen **Banks** tab, click the name of the district bank item you want to edit.
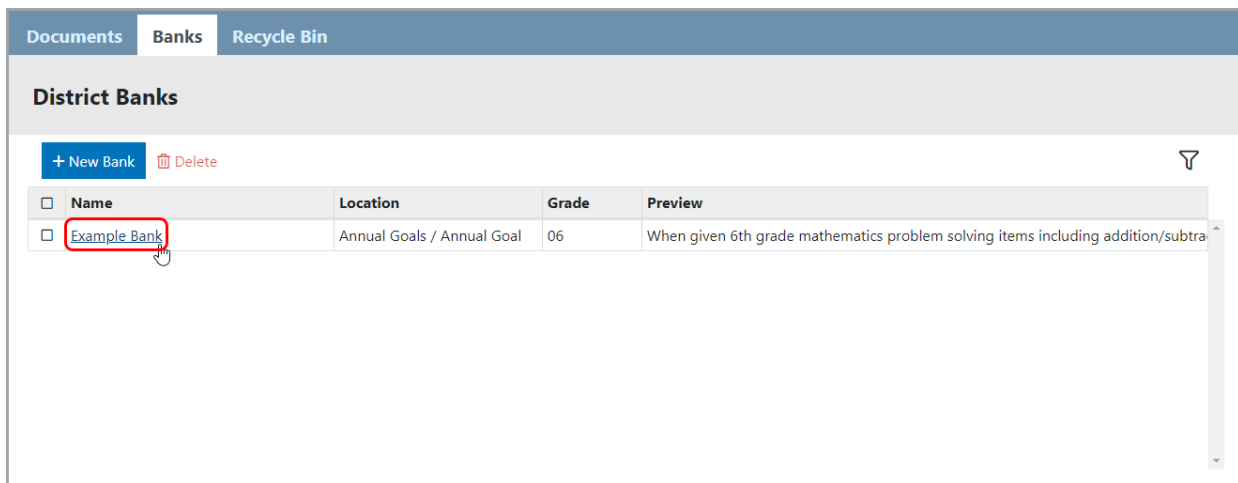
    The **District Banks** area displays below the grid with the **Location** to which the district bank applies.

2. Make any necessary changes.

    *Note: Once a district bank item has been created, its **Location** is no longer editable.*

3. Click **Save**.

    The **District Banks** area closes, and your changes display in the grid.

Deleting District Bank Items

In the **District Banks** area, you can delete an individual district bank item. In the grid on the **Student Documents** screen **Banks** tab, you can delete one or more district bank items.
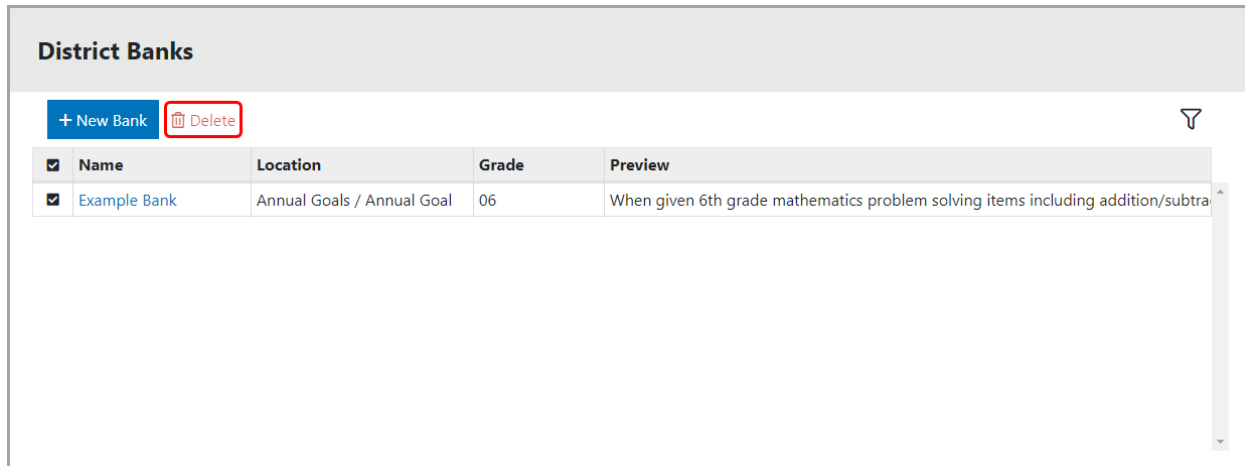
- *"Deleting a District Bank Item From the Grid"*
- *"Deleting a District Bank Item From the District Banks Area"*

Deleting a District Bank Item From the Grid

1. On the **Student Documents** screen **Banks** tab, in the row of the district bank item(s) you want to delete, select the checkbox.

   *Note: To delete all district bank items, select the **Name** checkbox in the grid header.*

2. Click **Delete**.
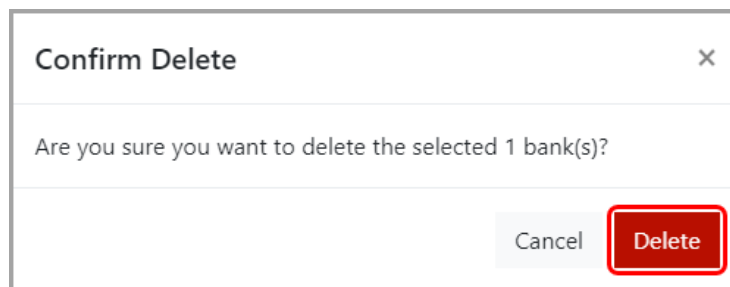
3. On the **Confirm Delete** window that opens, click **Delete**.

   The district bank item is deleted and no longer displays in the grid.

Deleting a District Bank Item From the District Banks Area

1. On the **Student Documents** screen **Banks** tab, click the name of the district bank item you want to delete.
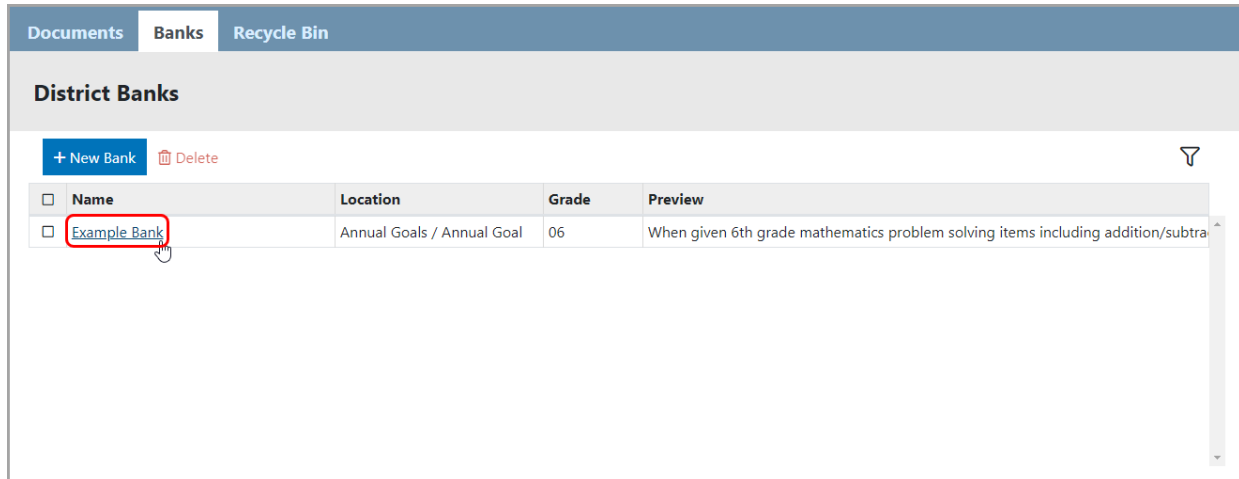
The **District Banks** area displays below the grid with the **Location** to which the district bank applies.

2. Click **Delete**.
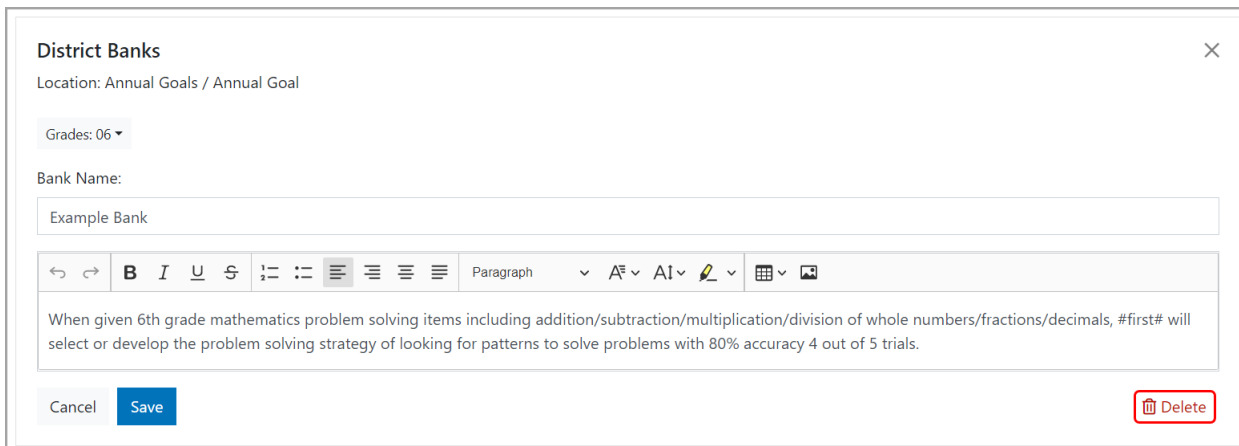
3. On the **Confirm Delete** window that opens, click **Delete**.
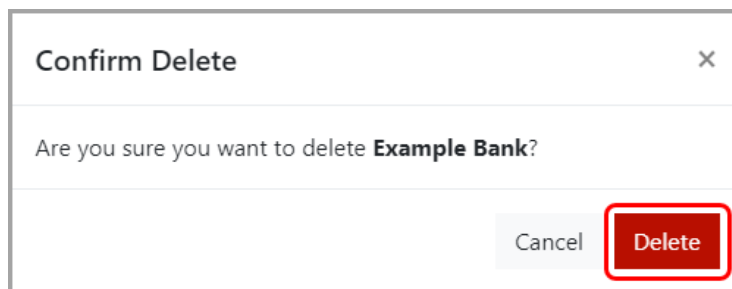
The district bank item is deleted and no longer displays in the grid.

Case Management

Navigation: SpecialServices > Case Management

As an administrator, you can manage the caseloads within your district across multiple school years. The **Case Management** screen lets you assign staff members as case managers and/or assign students to caseloads.

On the **Case Management** screen, complete one of the following:

- To view, edit, or create a caseload for the current school year, ensure that the current school year displays in the **School Year** drop-down list.

- To view, edit, or create a caseload for a future school year, select the desired **School Year** from the drop-down list.

> *Note: When you select a future school year, a warning message displays to indicate that a future school year is in context.*
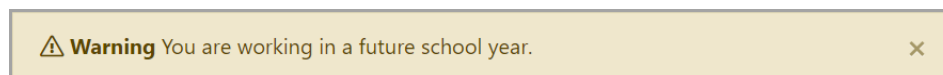
A list of all caseloads (if any) for the selected school year displays. Optionally, in the **Search Caseloads** field, enter 2 or more characters of a caseload name to narrow the list of caseloads that displays below the field.

You can now complete any of the following actions:

- *"Creating a New Caseload"*
- *"Assigning a Staff Member as a Case Manager"*
- *"Assigning Students to a Caseload"*
- *"Viewing a Caseload from a Past School Year"*

Creating a New Caseload

1. On the **Case Management** screen, with the desired school year in context, click **New Caseload**.
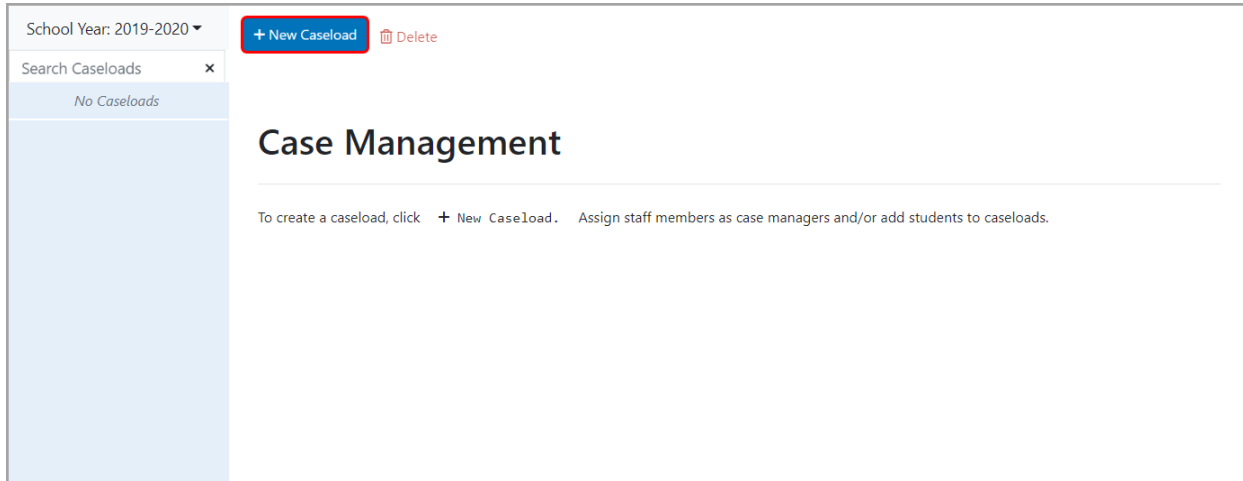
The new caseload displays on the left side of the screen with an indicator that displays the number of students currently assigned to the caseload.
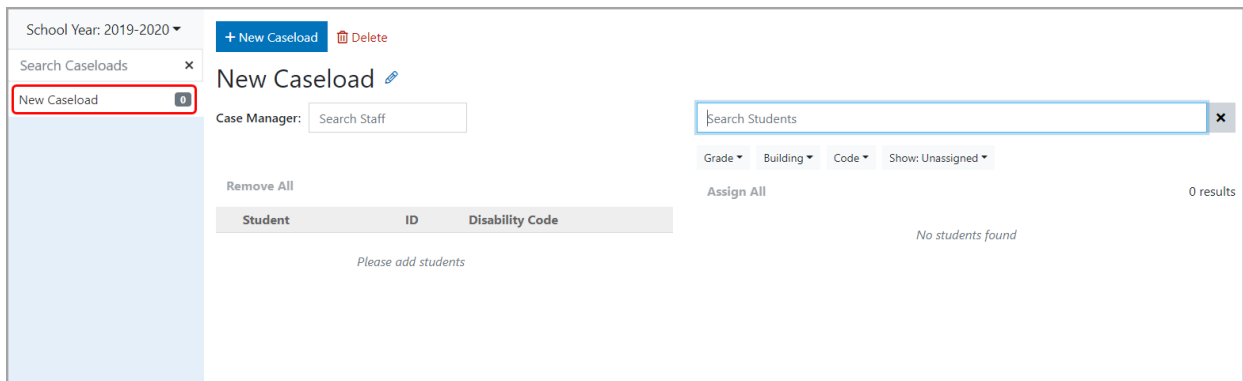
Note: To delete the caseload, click 🗑 Delete *.*

2. (Optional) To rename the caseload, beside **New Caseload**, click 🖊 . Then, enter the desired name for the caseload in the field.

3. Click outside of the field.

    A **Caseload Updated** message displays, and your changes save automatically.

Assigning a Staff Member as a Case Manager

1. On the **Case Management** screen, with the appropriate caseload selected, in the **Case Manager** field, enter 2 or more letters of a staff member's first or last name.

2. In the results list that displays, select the appropriate staff member.

   A **Save Successful** message displays, and the staff member is assigned as the case manager for this caseload.

Note: To unassign the staff member, click ✖ .

Assigning Students to a Caseload

1. On the **Case Management** screen, with the appropriate caseload selected, search for students using any combination of the following methods:

   - In the **Search Students** field, enter 2 or more letters of a student's first or last name.

   Note: To clear the field, click ✕ *.*

   - Below the **Search Students** field, select one or more filter options from any of the drop-down lists.

   Note: To clear your selections in a particular drop-down list, scroll to the bottom of the list, and then click ✕ Clear *.*

   A list of students displays based on the search criteria you entered and/or selected.

2. Beside the name(s) of the appropriate student(s), click ➕. Or, to assign all students who display in the results list, click **Assign All**.

The students you assigned display in a list below the **Case Manager** field, and on the left side of the **Case Management** screen, the indicator updates.

*Note: To unassign a student from the caseload, beside the student's name, click ✕ . Or, to unassign all students, click **Remove All***.

Viewing a Caseload from a Past School Year

You can view a caseload from a past school year in read-only format. In the **School Year** drop-down list, select the desired school year.

A list of all caseloads created for the selected school year displays. Optionally, in the **Search Caseloads** field, enter 2 or more characters of a caseload name to narrow the list of caseloads that displays below the field.
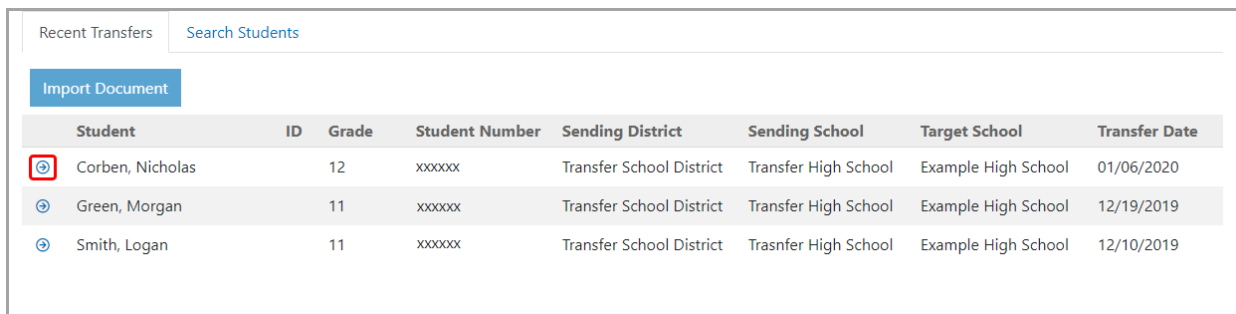
District Transfers

The **Document Import** screen lets you import a transfer student's documents from another district into your district. When you import a document, all of its associated forms and attachments are also imported. You can import a transfer student's documents on the *"Recent Transfers tab"* or the *"Search Students tab."*

Recent Transfers tab

On the **Document Import** screen **Recent Transfers** tab, a list of all recent transfer students (including those without special education documents) displays in the grid.

1. On the **Recent Transfers** tab, in the row of the student for whom you want to import documents, click ⊕.

⊕ then updates to ➡, and the student's information displays in bold text.

Note: If a student has no special education documents to import, a message displays above the grid to indicate that there are no documents available for that student.

2. Click **Import Document**.

Note: If a student has no special education documents to import, a message displays to indicate that there are no documents available for that student.

A success message displays with the number of documents that were successfully imported.

Search Students tab

On the **Document Import** screen **Search Students** tab, you can search for the students for whom you want to import documents.

1. On the **Student Search** tab, in the search field, enter 2 or more letters of a student's first or last name.

2. When the results list displays, click the name of the appropriate student.

   The student's name now displays in the field.

   Note: *To clear the field, click* ✕ *.*

3. Click **Import Document**.

   Note: *If a student has no special education documents to import, a message displays to indicate that there are no documents available for that student.*

   A success message displays with the number of documents that were successfully imported.

EMIS

Navigation: StudentInformation > EMIS > SpecialServices EMIS Extract

On the **SpecialServices EMIS Extract** screen in StudentInformation, you can create an EMIS extract, check for errors, and import the extract into StudentInformation so that the data can be reported to ODE.

- *"EMIS Extract Records"*
- *"How Documents Are Selected by Date Range in EMIS"*
- *"Creating an EMIS Extract"*
- *"Viewing an EMIS Extract and Error Log File"*
- *"Correcting EMIS Extract Errors"*
- *"Processing an EMIS Extract"*

EMIS Extract Records

The EMIS extract contains only the information from documents marked with **Include in EMIS** in SpecialServices; it does not contain all of the records or data elements required by EMIS. To complete the information required by EMIS, you must process the EMIS extract in StudentInformation.

You can generate any of the following records when you create an EMIS extract:

- **Student Attributes (FD)** – Reports a change in the student's disability information.
- **Student Special Education Graduation Req Record (FE)** – Reports each assessment area selected in the **Graduations Tests** section (if applicable) on the **Exemptions** form of a student's IEP or SP.
- **Student Program (GQ)** – Reports each service and program code selected in the **Specially Designed Services** form of a student's IEP.
- **Student Special Education Events (GE)** – Reports each event for which information is completed on the **Special Education Events** form for students with a disability or students suspected to have a disability.

How Documents Are Selected by Date Range in EMIS

The date range entered in the **Start Date** and **End Date** fields on the StudentInformation **SpecialServices EMIS Extract** screen determines how tasks are selected based on the following event dates:

- **Meeting Date** – The value entered in the **Meeting Date** field on the **Cover Page** of an IEP, ETR, SP, or 504P. For documents to be included in the EMIS extract, the meeting date of the document must fall within the entered date range, including the first and last date of the range.

- **Effective Dates** – The values entered in the effective start and end date fields on the **Cover Page** of an IEP, SP, or 504P. For documents to be included in the EMIS extract, the entered date range must include the effective dates of the document, but the range can start or end before, after, or during the effective dates.
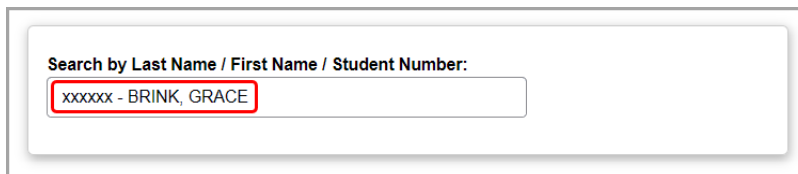
For example, if the date range entered for the EMIS extract is 06/01/2019 - 12/01/2019, documents with the following meeting or effective dates would display on the report:

- Any IEP, ETR, SP, or 504P with a meeting date of 06/01/2019 through, and including, 12/01/2019.
- Any IEP, SP, or 504P with an effective start date before 06/01/2019 and an effective end date before 12/01/2019, such as 05/10/2019 - 08/09/2019.
- Any IEP, SP, or 504P with an effective start date after 06/01/2019 and effective end date after 12/01/2019, such as 08/27/2019 - 05/31/2020.
- Any IEP, SP, or 504P with an effective start date after 06/01/2019 and effective end date before 12/01/2019, such as 08/30/2019 - 11/15/2019.
- Any IEP, SP, or 504P with an effective start date before 06/01/2019 and effective end date after 12/01/2019, such as 04/17/2019 - 04/16/2020.

Creating an EMIS Extract

1. On the **SpecialServices EMIS Extract** screen in StudentInformation, complete one of the following:

   - To create a district-level extract, put the appropriate district in context.
   - To create a building-level extract, put the appropriate school building in context.
   - To create an extract for an individual student, in the **Search by Last Name / First Name / Student Number** field, enter one of the following:
     - The student's full name in [Last Name, First Name] format
     - 2 or more letters of the student's first name
     - 2 or more letters of the student's last name
     - The student's identification number
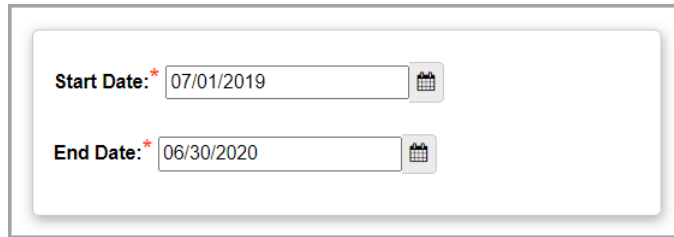
     Then, select the appropriate student from the results list that displays.
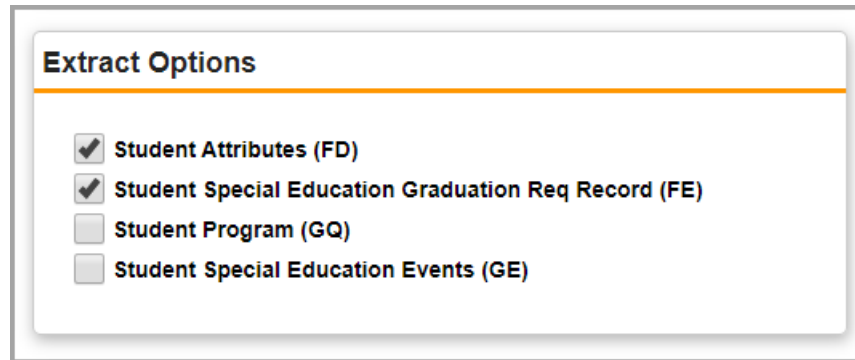
2. In the **Start Date** and **End Date** fields, enter or select a date range that includes the meeting or event dates of the SpecialServices documents that you want to include in the extract.

Start Date:* 07/01/2019

End Date:* 06/30/2020

3. In the **Extract Options** area, select the checkbox beside at least one option to include in the extract.

Extract Options

☑ Student Attributes (FD)
☑ Student Special Education Graduation Req Record (FE)
☐ Student Program (GQ)
☐ Student Special Education Events (GE)

4. Click **Submit**.

Viewing an EMIS Extract and Error Log File

On the **SpecialServices EMIS Extract** screen in StudentInformation, after you create an EMIS extract and click **Submit**, a grid with all EMIS extracts created for the school year displays.

> *Note: You can also access this grid by clicking **View Extract Files**.*

> *Note: For information on how EMIS extract files are named, see "File Naming Conventions."*

Complete either of the following actions:

- In the row of the appropriate extract, click the **Filename** to view the extract as a .txt file. If the extract does not have an error log file associated with it, it is ready to be processed (see *"Processing an EMIS Extract"*).

EMIS Extract File

```
GE 2020N043505A27490455RIEP20190923IE13**2019092420200922STA****
GE 2020N043505A27271559TETR20190916ET10**2019091620220519*******
GE 2020N043505A27271559TIEP20190830IE13**2019083020200527STA****
GE 2020N043505A27271719TETR20190915ET12**2019091520200426*******
GE 2020N043505A27271719TIEP20190828IE13**2019082820200505STA****
GE 2020N043505A27590498RIEP20190912IE13**2019091320200911STA****
GE 2020N043505A27505109RIEP20190925IE13**2019092620200924STA****
GE 2020N043505A27969954RIEP20190925IE14**2019092620200924ALT****
GE 2020N043505A27280077TIEP20190905IE13**2019090520200107STA****
GE 2020N043505A27696971TETR20190916ET12**2019091620210409*******
GE 2020N043505A27696971TIEP20190919IE14**2019092020200409STA****
GE 2020N043505A27696967RETR20190925ET09**0000000000000000*******
GE 2020N043505A27696967RIEP20190925IE14**2019092620200924ALT****
GE 2020N043505A27696806RIEP20190912IE15**2019091320200911ALT****
GE 2020N043505A27590523RIEP20190918IE13**2019091920200917STA****
GE 2020N043505A27590523TETR20190909ET10**2019090920210523*******
GE 2020N043505A27271752TETR20190916ET10**2019091620220410*******
GE 2020N043505A27271752TIEP20190912IE14**2019091320200410ALT****
GE 2020N043505A27190614RIEP20190912IE13**2019091320200911STA****
GE 2020N043505A27190711RIEP20190913IE14**2019091420200912STA****
```

- In the row of the appropriate extract, click ⚠ to view the extract error log file (if applicable) as a .txt file. You can use the EMIS extract error log file to review and correct errors in the extract so that you can resubmit your EMIS extract request (see *"Correcting EMIS Extract Errors"*).

EMIS Extract Error Log File

```
BROWN, JOHN (xxxxxxxxx) - GE - NonCompliance Id is missing from IETR
FELDMAN, KELSI (xxxxxxxxx) - GE - Start Date is missing from IISP
GORDON, AARON (xxxxxxxxx) - GE - End Date is missing from IISP
MONROE, BLAKE (xxxxxxxxx) - GE - Start Date is missing from RISP
YAMIN, AIDEN (xxxxxxxxx) - GE - End Date is missing from RISP
```

Note: Only extracts with no associated error log file can be processed.

File Naming Conventions

EMIS extracts and error log files are named using the selection criteria and school year for which you create the extract. The naming convention varies based on whether you create an extract for a district, building, or an individual student.

- *"District-Level Extract Naming Convention"*
- *"Building-Level Extract Naming Convention"*
- *"Student Extract Naming Convention"*

District-Level Extract Naming Convention

If you create the extract for an entire district, the file name comprises the following parts:

- The district IRN (prefixed by D); e.g., D999123
- The fiscal year (prefixed by FY) for which you created the file; e.g., FY2020

For example, an EMIS extract file created for district 999123 in the 2019–2020 school year displays as **SpSEMISExtract_D999123_FY2020.txt**.

Building-Level Extract Naming Convention

If you create the extract for a single building, the file name comprises the following parts:

- The building IRN (prefixed by B); e.g., B999321
- The district IRN (prefixed by D); e.g., D999123
- The fiscal year (prefixed by FY) for which you created the file; e.g., FY2020

For example, an EMIS extract file created for building 999321 and district 999123 in the 2019–2020 school year displays as **SpSEMISExtract_B999321_D999123_FY2020.txt**.

Student Extract Naming Convention

If you create the extract for a single student, the file name comprises the following parts:

- The student's EMIS ID (prefixed by S); for example: S999246803
- The district IRN (prefixed by D); for example: D999123
- The fiscal year (prefixed by FY) for which you created the file; for example: FY2020

For example, an EMIS extract file created for student 999246803 and district 999123 in the 2019–2020 school year displays as **SpSEMISExtract_S999246803_D999123_FY2020.txt**.

Correcting EMIS Extract Errors

You should correct any errors in the EMIS extract (see *"EMIS Extract Error Log Messages"*) by modifying the appropriate form in the document.

1. Create a new document from the document that contains the incorrect information (see the "Creating a New Document**"** section of the *ProgressBook SpecialServices User Guide*).

2. Correct the appropriate forms in the document as necessary.

3. Complete the document (see the "Completing a Document" section of the *ProgressBook SpecialServices User Guide*).

4. On the **Student Documents** screen **Documents** tab, delete the incorrect document.

5. Create a new EMIS extract on the **SpecialServices EMIS Extract** screen in StudentInformation, and then verify that the error no longer occurs.

   Note: When correcting errors, you may find it easier to verify that the error has been corrected by creating an EMIS extract only for the student whose data you corrected.

EMIS Extract Error Log Messages

Error Message	Solution
General	
No records were found.	Verify that there is an applicable document in the date range you specified.
Student Attributes (FD)	
[Student Last Name, Student First Name] [EMIS ID] - FD - Disability Condition is missing	Select the applicable disability code in the drop-down list on the ETR **Eligibility** form for the indicated student.
[Student Last Name, Student First Name] [EMIS ID] - FD - Missing or invalid Effective Start Date	Enter or select the appropriate effective start date of the applicable document for the indicated student.
Student Program (GQ)	
[Student Last Name, Student First Name] [EMIS ID] - GQ - Missing or invalid Start Date for Program [Code]	Enter or select the appropriate date in the **Begin** field for the indicated service on the IEP or SP **Specially Designed Services** form in the **Related Services**, **Specially Designed Instruction**, and/or **Support for School Personnel** sections.
[Student Last Name, Student First Name] [EMIS ID] - GQ - Missing or invalid End Date for Program [Code]	Enter or select the appropriate date in the **End** field for the indicated service on the IEP or SP **Specially Designed Services** form in the **Related Services**, **Specially Designed Instruction**, and/or **Support for School Personnel** sections.
[Student Last Name, Student First Name] [EMIS ID] - GQ - Invalid Start Date for Program [Code]	Enter or select a valid date in the **Begin** field for the indicated service on the IEP or SP **Specially Designed Services** form in the **Related Services**, **Specially Designed Instruction**, and/or **Support for School Personnel** sections.
[Student Last Name, Student First Name] [EMIS ID] - GQ - Invalid End Date for Program [Code]	Enter or select a valid in the **End** field for the indicated service on the IEP or SP **Specially Designed Services** form in the **Related Services**, **Specially Designed Instruction**, and/or **Support for School Personnel** sections.

Error Message	Solution
[Student Last Name, Student First Name] [EMIS ID] - GQ - Missing or invalid IEP Effective Start Date for Program [Code]	Enter or select the appropriate date in the **IEP Effective Start Date** field for the indicated service in the **IEP Time Lines** section on the IEP **Cover Page** for the indicated student.
[Student Last Name, Student First Name] [EMIS ID] - GQ - Missing or invalid IEP Effective End Date for Program [Code]	Enter or select the appropriate date in the **IEP Effective End Date** field for the indicated service in the **IEP Time Lines** section on the IEP **Cover Page** for the indicated student.
[Student Last Name, Student First Name] [EMIS ID] - GQ - Invalid IEP Effective Start Date for Program [Code]	Enter or select a valid date in the **IEP Effective Start Date** field for the indicated service in the **IEP Time Lines** section on the IEP **Cover Page** for the indicated student.
[Student Last Name, Student First Name] [EMIS ID] - GQ - Invalid IEP Effective End Date for Program [Code]	Enter or select a valid date in the **IEP Effective End Date** field for the indicated service in the **IEP Time Lines** section on the IEP **Cover Page** for the indicated student.
[Student Last Name, Student First Name] [EMIS ID] - GQ - Start Date is not within the IEP Effective Start Date and IEP Effective End Date for Program [Code]	Enter or select a date in the **Begin** field for the indicated service on the IEP **Specially Designed Services** form that falls between the **IEP Effective Start Date** and **IEP Effective End Date** in the **IEP Time Lines** section on the IEP **Cover Page** for the indicated student. This error message does not apply to AIEPs.
[Student Last Name, Student First Name] [EMIS ID] - GQ - End Date is not within the IEP Effective Start Date and IEP Effective End Date for Program [Code]	Enter or select a date in the **End** field for the indicated service on the IEP **Specially Designed Services** form that falls between the **IEP Effective Start Date** and **IEP Effective End Date** in the **IEP Time Lines** section on the IEP **Cover Page** for the indicated student. This error message does not apply to AIEPs.
Student Special Education Events (GE)	
[Student Last Name, Student First Name] [EMIS ID] - GE - Outcome Id is missing from [Event]	Select the appropriate **Outcome ID** from the drop-down list for the indicated event on the **Special Education Events** form for the indicated student. This error message is valid for IIEPs, AIEPs, RIEPs, TIEPs, IISPs, RISPs, and TETRs.
[Student Last Name, Student First Name] [EMIS ID] - GE - NonCompliance Id is missing from [Event]	Select the appropriate **Non-Compliance ID** from the drop-down list for the indicated event on the **Special Education Events** form for the indicated student. This error message is valid for IIEPs, AIEPs, RIEPs, TIEPs, IISPs, RISPs, and TETRs.
[Student Last Name, Student First Name] [EMIS ID] - GE - IEP Test Type is missing from [Event]	Select the appropriate **IEP Test Type** from the drop-down list for the indicated event on the IEP **Special Education Events** form for the indicated student. This error message is valid for IIEPs, RIEPs, AIEPs, and TIEPs.

Error Message	Solution
[Student Last Name, Student First Name] [EMIS ID] - GE - Missing or invalid Start Date for [Event]	Enter or select the appropriate date in the **IEP Effective Start Date** field for the indicated event in the **IEP Time Lines** section on the IEP **Cover Page** for the indicated student. OR Enter or select the appropriate date in the **SP Effective Start Date** field for the indicated event in the **SP Time Lines** section on the SP **Cover Page** for the indicated student. This error message is valid for IIEPs, RIEPs, AIEPs, IISPs, and RISPs.
[Student Last Name, Student First Name] [EMIS ID] - GE - Missing or invalid End Date for [Event]	Enter or select the appropriate date in the **IEP Effective End Date** field for the indicated event in the **IEP Time Lines** section on the IEP **Cover Page** for the indicated student. OR Enter or select the appropriate date in the **SP Effective Start Date** field for the indicated event in the **SP Time Lines** section on the SP **Cover Page** for the indicated student. This error message is valid for IIEPs, RIEPs, AIEPs, IISPs, and RISPs.
[Student Last Name, Student First Name] [EMIS ID] - GE - Missing or invalid Event Date for [Event]	Enter or select the appropriate date in the **Date** field for the indicated event on the **Special Education Events** form for the indicated student. This error message is valid for IIEPs, AIEPs, RIEPs, TIEPs, IISPs, RISPs, and TETRs.
[Student Last Name, Student First Name] [EMIS ID] - GE - Invalid Event Date for [Event]	Enter or select a valid date in the **Date** field for the indicated event on the **Special Education Events** form for the indicated student. This error message is valid for IIEPs, AIEPs, RIEPs, TIEPs, IISPs, RISPs, and TETRs.

Error Message	Solution
[Student Last Name, Student First Name] [EMIS ID] - GE - Invalid Start Date for [Event]	Enter or select a valid date in the **IEP Effective Start Date** field for the indicated event in the **IEP Time Lines** section on the IEP **Cover Page** for the indicated student. OR Enter or select a valid date in the **SP Effective Start Date** field for the indicated event in the **SP Time Lines** section on the SP **Cover Page** for the indicated student. This error message is valid for IIEPs, AIEPs, RIEPs, TIEPs, IISPs, and RISPs.
[Student Last Name, Student First Name] [EMIS ID] - GE - Start Date must be greater than or equal to Event Date for [Event]	Enter or select a date in the **IEP Effective Start Date** field in the **IEP Time Lines** section on the IEP **Cover Page** that falls before or on the same date entered in the **Date** field for the indicated event on the IEP **Special Education Events** form for the indicated student. OR Enter or select a date in the **SP Effective Start Date** field in the **SP Time Lines** section on the SP **Cover Page** that falls before or on the same date entered in the **Date** field for the indicated event on the SP **Special Education Event** form for the indicated student. This error message is valid for IIEPs, AIEPs, RIEPs, TIEPs, IISPs, and RISPs.

Processing an EMIS Extract

Processing the EMIS extract pulls EMIS data that is reported to ODE from SpecialServices into StudentInformation.

1. On the **SpecialServices EMIS Extract** screen in StudentInformation, in the row of the EMIS extract you want to process, select the checkbox.

   Note: Only extracts with no associated error log file can be processed.

2. Click **Process Selected Files**.

A success message displays, and the extract is processed in StudentInformation. The extract can then be reported to ODE.