



ProgressBook SpecialServices User Guide



SpecialServices

ProgressBook SpecialServices User Guide

(This document is current for v21.3.0 or later.)

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Change Log

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

Product Version	Heading	Page	Reason
21.3.0	"Viewing the Student Profile"	8	Added a note that pronunciation information displays by the student's name if it has been entered in StudentInformation.
21.3.0	"Renaming a Document"	58	Added section.
21.0.0	"Special Education Tab"	13	Updated text to reflect that the District of Service field value can be manually entered.
21.0.0	"Adding Additional Forms"	32	Updated screenshots to reflect that the ACT/SAT Consent for Accommodations Request form has been renamed SAT Consent for Accommodation Request and the addition of the Consent to Release Information to ACT form.
20.2.0	"Student Documents"	18	Updated text and screenshot to reflect new icon in the Include in EMIS column.
20.2.0	"Creating a New Document"	26	Updated text and screenshot to reflect addition of the Exclude from EMIS checkbox on the Create New Document window.
20.2.0	"Include in EMIS"	52	Updated text to reflect that all IEP, ETR, SP, 504P, and MD documents with a Status of Open , In Review , or Completed are now marked with Include in EMIS by default. Updated text to include new icon in the Include in EMIS column.
N/A	"Special Education Tab"	13	Updated text and screenshot to reflect addition of the In Review Documents section.
20.1.0	"Accessing SpecialServices"	1	Updated screenshots to reflect that GradeBook and CentralAdmin headers and backgrounds have been updated to match the Frontline color scheme.
20.1.0	"Student Documents"	18	Updated text and screenshots to reflect addition of the Include in EMIS button and the Include in EMIS column.
20.1.0	"Filters"	20	Updated text to reflect addition of the Include EMIS filter in the Status drop-down list.
20.1.0	"Column Preferences"	21	Updated text and screenshot to reflect addition of the Include in EMIS category.
20.1.0	"Include in EMIS"	52	Added section.
20.1.0	"Accessing the DCF From the Documents Tab"	67	Updated screenshot to reflect addition of the Include in EMIS button.
N/A	"Student Documents"	18	Added bullet point for hourglass icon.
N/A	"Bank Codes"	47	Added section.

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Welcome to SpecialServices

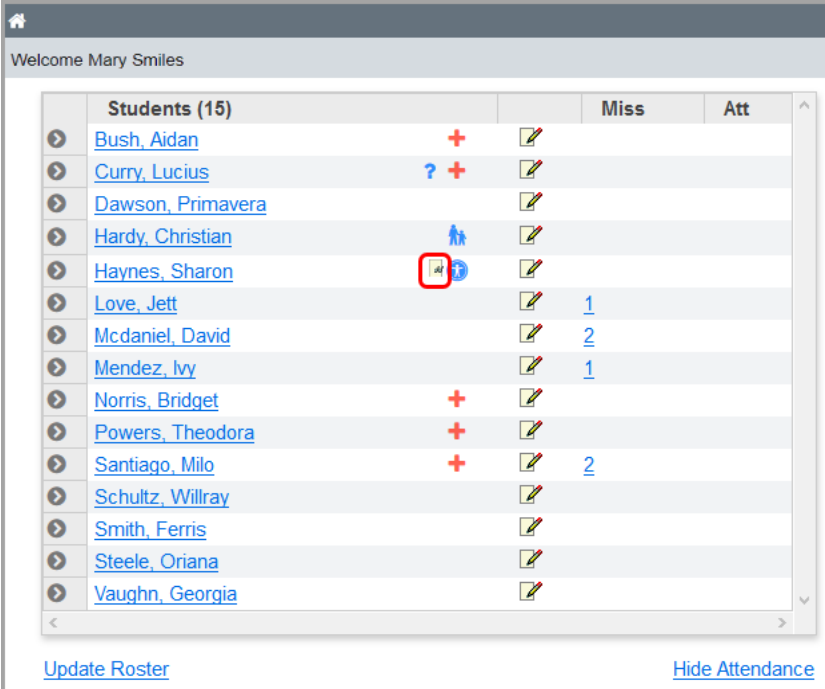
SpecialServices integrates the tasks necessary for special educators to identify, evaluate, and monitor a student's progress in a special education program. The application keeps state-required documents up to date so that districts can remain in compliance with state and federal laws. Information from these documents can then be extracted in the state-mandated format and imported into StudentInformation or a state data collection tool.

- [“Accessing SpecialServices”](#)
- [“Finding the Information You Need”](#)
- [“Navigating SpecialServices”](#)
- [“Special Education Process Flow”](#)


Accessing SpecialServices

You can access SpecialServices in any of the following ways:


- If you are a teacher in GradeBook with the appropriate security privileges to view and/or modify documents in SpecialServices, you can access documents for your students on the GradeBook **Class Dashboard** screen. Beside a student's name, click  to open the SpecialServices **Student Profile** screen **Special Education** tab.




Welcome Mary Smiles

Students (15)		Miss	Att
Bush, Aidan	+		
Curry, Lucius	? +		
Dawson, Primavera			
Hardy, Christian			
Haynes, Sharon			
Love, Jett			1
Mcdaniel, David			2
Mendez, Ivy			1
Norris, Bridget	+		
Powers, Theodora	+		
Santiago, Milo	+		2
Schultz, Willray			
Smith, Ferris			
Steele, Oriana			
Vaughn, Georgia			

[Update Roster](#) [Hide Attendance](#)

Note:  displays only if a student has completed documents in SpecialServices with event dates that fall within the last 13 months.

Welcome to SpecialServices

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

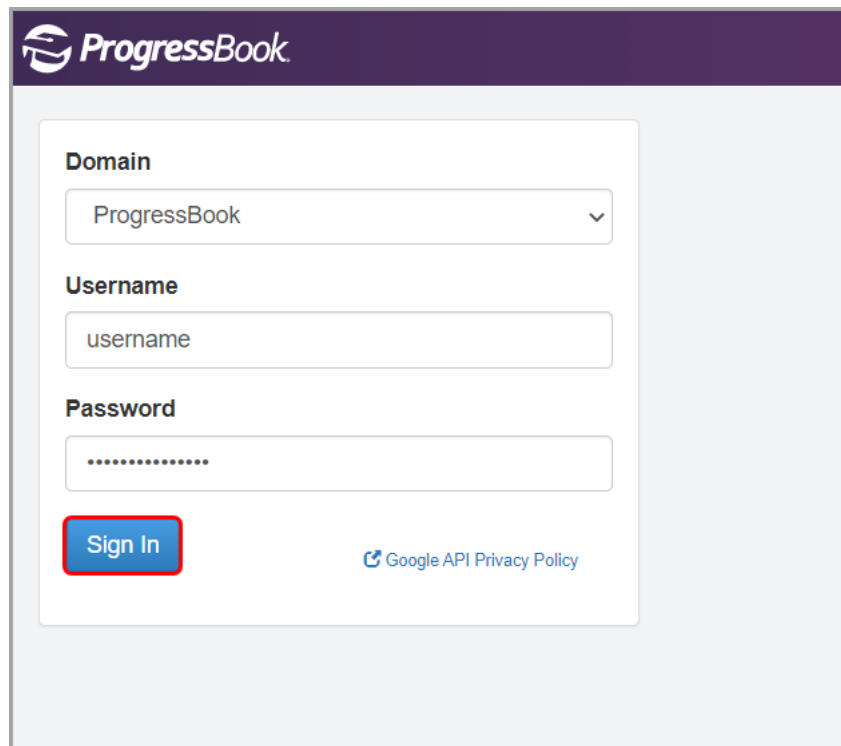


- If you are not already logged in to ProgressBook or if your district provides standalone access to SpecialServices via URL, you must log in (see [“Logging In to SpecialServices”](#)).

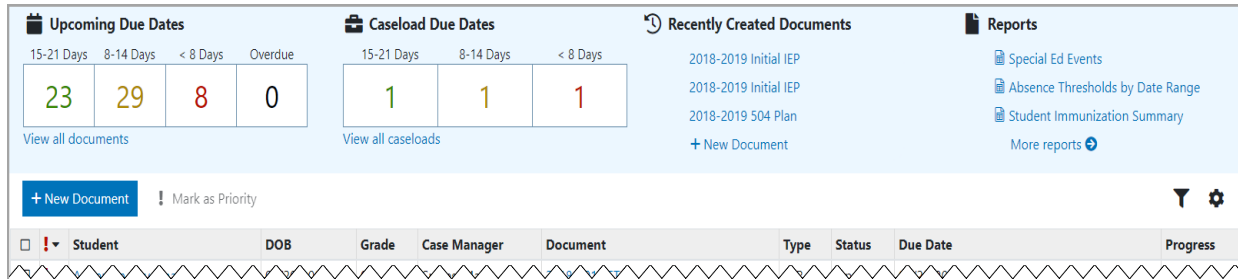
Logging In to SpecialServices

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**.


A screenshot of the ProgressBook login screen. The screen has a dark purple header with the ProgressBook logo. Below the header is a light gray background. In the center is a white login form with the following fields: a "Domain" drop-down menu with "ProgressBook" selected, a "Username" text input field with "username" entered, and a "Password" text input field with "....." entered. Below the password field is a blue "Sign In" button with a red border. To the right of the button is a link for "Google API Privacy Policy".

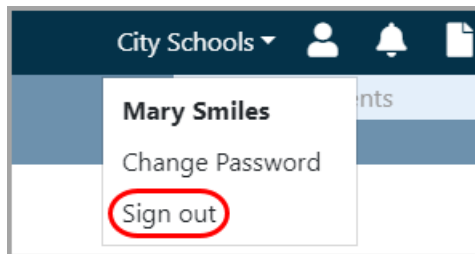
The SpecialServices **Dashboard** screen displays.



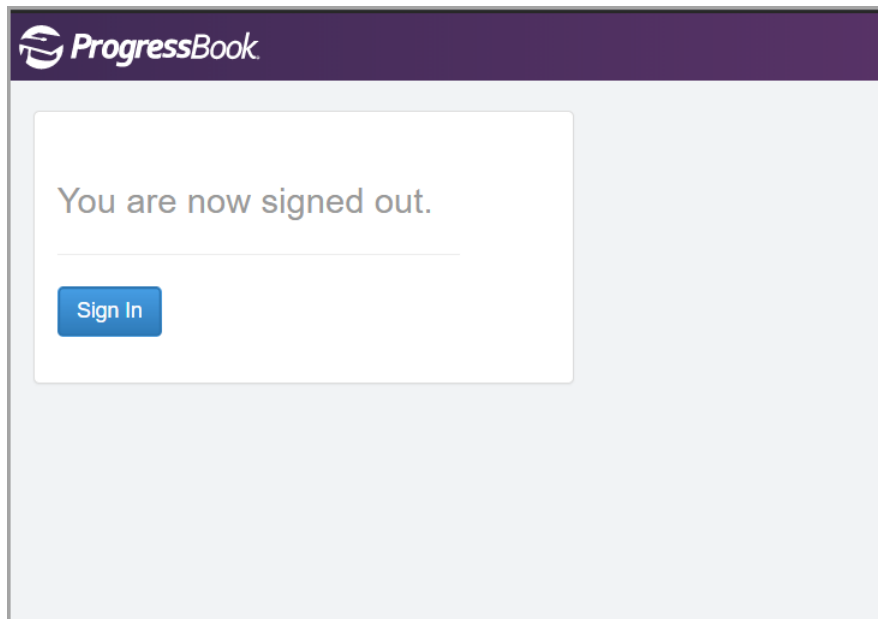
Note: For more information on the **Dashboard** screen, see [“Dashboard.”](#)

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, you are automatically logged out of ProgressBook after a period of inactivity, a length of time that is determined by an administrator. The time calculating inactivity resets each time you perform an action anywhere in ProgressBook. Once automatic logout occurs, the ProgressBook login screen displays and you must log in again to continue working.

Finding the Information You Need



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

- **WebHelp** – Click  on the top-right corner of any screen to view ProgressBook WebHelp (see [“Using SpecialServices WebHelp”](#)).
- **Tooltips** – To view the description of a button or symbol, hover your cursor over the icon.

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

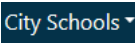




- [“Understanding the Banner”](#)
- [“Following Breadcrumbs”](#)
- [“Navigating to Other Screens”](#)

Understanding the Banner



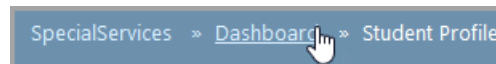
The banner at the top of every screen in SpecialServices lets you perform the following functions:

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 “Following Breadcrumbs”).


Icon	Function
	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 will be 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 <i>ProgressBook StudentInformation Analytics Hub Guide</i> .)
	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”).

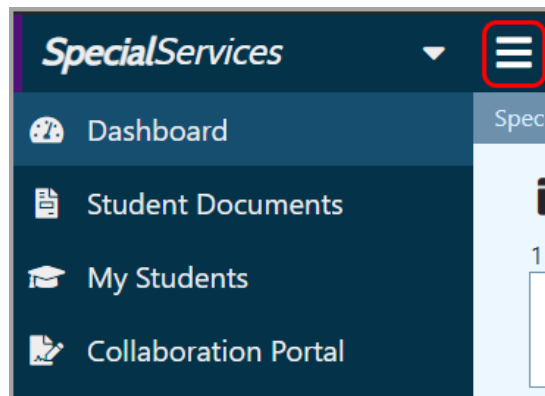
Following Breadcrumbs

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.



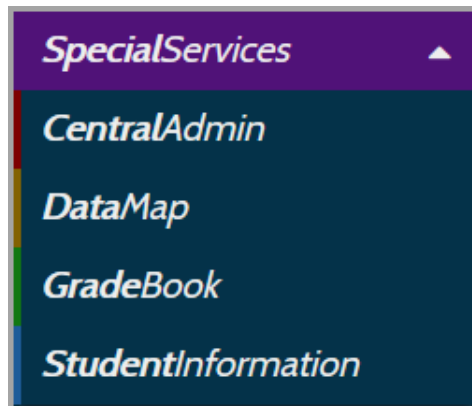
Note: Your security role determines which screens you can access.

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 .

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



Special Education Process Flow

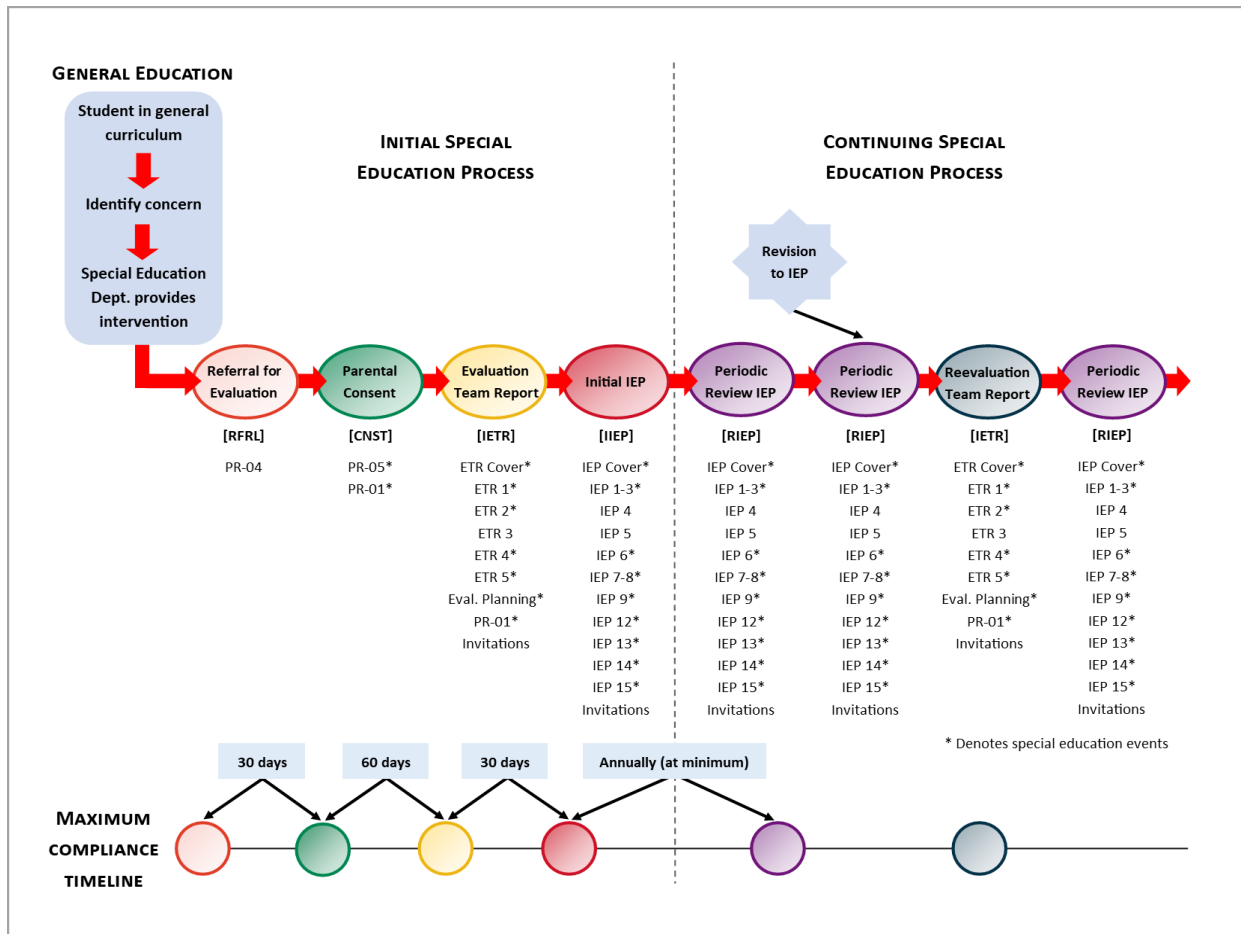
SpecialServices is designed to follow federal- and state-mandated timelines and procedures. To accommodate these requirements, SpecialServices uses documents that correspond with special education events and contain forms needed to complete the event. For more information about each document, see [“SpecialServices Documents.”](#)

In SpecialServices, an open document is the special education event in which the members of a special education team are editing forms. Only users with appropriate security privileges can view or edit open documents.

Once all the forms for a document are complete, the document must be marked as completed. You might complete a document to keep a historical copy of a draft document, such as an IEP, or only when the effective version of the document is implemented.

The last component of the special education process that SpecialServices provides is EMIS reporting. Certain events, such as an initial IEP or reevaluation ETR, are reported to the state to ensure compliance with federal- and state-mandated standards and ensure funding of special education programs for the district. The EMIS reporting tool selects data only from completed documents.

The following flowchart displays the special education process flow, the corresponding documents provided by SpecialServices, and the forms associated with each document.



Student Profile

The **Student Profile** screen provides an overview of a single student's information using data read directly from StudentInformation.

- [“Viewing the Student Profile”](#)
- [“Personal Tab”](#)
- [“Contacts Tab”](#)
- [“Special Education Tab”](#)

Viewing the Student Profile

On any screen where student names display, click the name of the student whose **Student Profile** screen you want to view.

<input type="checkbox"/>	! Student	Case Manager ▾	Document	Type	Due Date	Progress
<input type="checkbox"/>	Acosta, Brooke	Masters, Paul	2018-2019 Review IEP	IEP	08/30/2019 11 days	
<input type="checkbox"/>	Brown, Garrett	Masters, Paul	2018-2019 Initial IEP	IEP	08/20/2019 1 day	<div style="width: 60%;">60%</div>

The **Student Profile** screen **Personal** tab displays.

Acosta, Brooke ⊕

School Building: Local High School Gender: F Calendar: DFLT
 ID: xxxxxx BirthDate: 01/13/2004 Counselor: Martin, Juliet
 Status: ACTIVE RES Grade: 09 Homeroom:

Student Addresses & Contact Information

Residence
1234 Example Way
Cleveland, OH xxxxxx

Mailing
Same as Residence

Phone Number
(xxx) xxx-xxxx

Email Address
FakeAddress@Software-Answers.com

Parent/Guardian
Virginia Acosta
Cell: (xxx) xxx-xxxx

Parent/Guardian
Andrew Acosta
Cell: (xxx) xxx-xxxx

Transportation

Walks: ✓

Bussed: ✓ **Bus:** 10

Drives:

Personal

Contacts

Special Education

Additional Details

Ethnicity
White

Academic Locker
556

Admission History
10/15/2012 - Enrolled

Programs

Student received intervention provided during regular school Started - 8/27/2014

Student received intervention provided during regular school Started - 8/25/2016

Family Group

Savannah Austin Grade 11 Example High School

Isabella Austin ✓ Grade 04 Example Elementary School

✓ = Student is courier for family group

Note: All information on the **Student Profile** screen is read-only.

The blue header at the top of the **Student Profile** screen displays on each tab and contains the following information about the student:

- First and last name

***Note:** Pronunciation information displays by the student's name if it has been entered in StudentInformation.*

- **School Building**
- **Gender**
- **Calendar** type
- Identification number (**ID**)
- Birthdate
- **Counselor** name
- Student **Status**
- **Grade** level
- **Homerom**

Personal Tab


Navigation: SpecialServices > Student Profile > Personal tab

The **Student Profile** screen **Personal** tab displays all of a student's personal information that has been entered into StudentInformation.

- *["Student Addresses & Contact Information"](#)*
- *["Additional Details"](#)*
- *["Transportation"](#)*
- *["Programs"](#)*

Student Profile

- “Family Groups”



Acosta, Brooke

School Building: Local High School Gender: F Calendar: DFLT
ID: xxxxxx BirthDate: 01/13/2004 Counselor: Martin, Juliet
Status: ACTIVE RES Grade: 09 Homeroom:

Student Addresses & Contact Information

Residence 1234 Example Way Cleveland, OH xxxxx	Mailing Same as Residence
Phone Number (xxx) xxx-xxxx	Email Address FakeAddress@Software-Answers.com
Parent/Guardian Virginia Acosta Cell: (xxx) xxx-xxxx	Parent/Guardian Andrew Acosta Cell: (xxx) xxx-xxxx

Transportation

Walks:

Bussed: Bus: 10

Drives:

Programs

Student received intervention provided during regular school	Started - 8/27/2014
Student received intervention provided during regular school	Started - 8/25/2016

Family Group

Savannah Austin	Grade 11	Example High School
Isabella Austin <input checked="" type="checkbox"/>	Grade 04	Example Elementary School

= Student is courier for family group

Additional Details

Ethnicity White	Academic Locker 556
Program	Admission History 10/15/2012 - Enrolled

Personal

Contacts

Special Education

Student Addresses & Contact Information

Student Addresses & Contact Information

Residence 1234 Example Way Cleveland, OH xxxxx	Mailing Same as Residence
Phone Number (xxx) xxx-xxxx	Email Address FakeAddress@Software-Answers.com
Parent/Guardian Virginia Acosta Cell: (xxx) xxx-xxxx	Parent/Guardian Andrew Acosta Cell: (xxx) xxx-xxxx

- **Residence** – Displays the student’s resident address.
- **Mailing** – Displays the student’s mailing address. If this address is the same as the student’s resident address, **Same as Residence** displays.
- **Phone Number** – Displays the student’s primary phone number.
- **Email Address** – Displays the student’s email address.
- **Parent/Guardian** – Displays the first and last name and primary phone number for each of the student’s parents/guardians.

Additional Details

Additional Details	
Ethnicity	Academic Locker
White	556
Program	Admission History
	10/15/2012 - Enrolled

The **Additional Details** area displays miscellaneous information including the student's ethnicity, special education program membership, locker information, and admission history.

Transportation

Transportation		
Walks:	✓	
Bussed:	✓	Bus: 10
Drives:	✓	Parking Space: P198 Permit#: 198


- **Walks** – Displays with a checkmark if the student walks to/from school.
- **Bussed** – Displays with a checkmark if the student rides the bus to/from school.
- **Bus** – If a checkmark displays beside **Bussed**, displays the student's bus number.
- **Drives** – Displays a checkmark if the student drives to/from school.
- **Parking Space** – If a checkmark displays beside **Drives**, displays the student's parking space assignment.
- **Permit#** – If a checkmark displays beside **Drives**, displays the student's parking permit number.

Programs

Programs	
Student received intervention provided during regular school	Started - 8/27/2014
Student received intervention provided during regular school	Started - 8/25/2016

The **Programs** area displays the student's program membership(s) and the date they joined the program(s).

Family Groups

Family Group		
Savannah Austin	Grade 11	Example High School
Isabella Austin 	Grade 04	Example Elementary School
 = Student is courier for family group		

The **Family Groups** area displays the name, grade level, and school building for each member of the student’s family group and indicates the courier for the family group.

Contacts Tab

Navigation: SpecialServices > Student Profile > Contacts tab

				Personal
				Contacts
				Special Education
May Austin Mother <i>Primary Contact</i> Custody Parent Language ENG	Home (xxx) xxx-xxxx <i>Unlisted</i> Primary Email fakeaddress@email.com ParentAccess Account m.austin	Residence 1234 Example Way Cleveland, OH xxxxx County Cuyahoga	Flags <ul style="list-style-type: none">• Primary• Guardian• Emergency Contact• Living with Student• Same as Student Address• Copied on Correspondance• Medical• Access to Records• Access to SpS• Authorized to Pick Up• Disciplinary• Primary Care Provider• Custodial• Publically Viewable• Available at Work	
Gene Newman Dentist Language ENG	Work (xxx) xxx-xxxx Primary Email GeneNewman@email.com	Residence 9876 Example Street Cleveland, OH xxxxx County Cuyahoga	Flags <ul style="list-style-type: none">• Publically Viewable• Available At Work	

The **Student Profile** screen **Contact** tab displays the following information for each of the student’s parents/guardians (or for any other contacts entered into StudentInformation):

- First and last name
- Relationship to student
- Custody (if applicable)
- Whether they are the **Primary Contact**
- **Language**
- **Home** phone number
- **Cell** phone number
- **Primary Email** address
- **ParentAccess Account** (if applicable)

- Resident address
- **County** of residence
- All associated StudentInformation **Flags**

Note: For more information on StudentInformation flags, see the ProgressBook StudentInformation Student and Registration Guide.

Special Education Tab

Navigation: SpecialServices > Student Profile > Special Education tab

+ New Document

Personal

Contacts

Special Education

Case Manager Paul Masters	District Of Service Example District	Disability Condition VI - Visual Impairments
Most Recent IEP Summary 06/14/2015	District Of Residence Example District	Gifted Identification

Open Documents

Document Name	Type	Created By	Start Date	Due Date
2018-2019 Transition & Goals/Obj	PR	Masters, Paul	08/09/2019	08/17/2019
2018-2019 Review IEP	IEP	Masters, Paul	08/09/2019	08/16/2019
2018-2019 Reevaluation ETR	ETR	Allen, Betty	08/21/2019	08/28/2019

In Review Documents

Document Name	Type	Created By	Event Date	Completed Date
2019 - 2020 RIEP	IEP	Masters, Paul	05/17/2020	06/18/2020

Completed Documents

Document Name	Type	Event Date	Completed Date
No Documents Found			

Note: If you have the appropriate security privileges, the **New Document** button displays. You can click **New Document** to open the **Create New Document** window (see [“Creating a New Document”](#)).

The **Student Profile** screen **Special Education** tab displays the following special education information for the student:

- Student’s **Case Manager**
- A link to the student’s **Most Recent IEP Summary**
- **District of Service** (read from StudentInformation)
- **District of Residence** (read from StudentInformation or manually entered)
- Student’s **Disability Condition** code(s) (read from StudentInformation)

Student Profile

- Student's **Gifted Identification** code(s) (read from StudentInformation)
- Each open document as a link that you can click to view the document overview version of the **Student Documents** screen
- Each document currently in review as a link that you can click to view the document overview version of the **Student Documents** screen
- Each completed document as a link that you can click to open a PDF version of the completed document

Dashboard

The **Dashboard** screen is the default screen that displays when you access SpecialServices. The top half of the screen is composed of summary information regarding document due dates, your recently created documents, and your recently run reports. The bottom half of the screen displays all documents with a **Status of Open, In Review, or Completed** with due dates within the past 3 years for the students to whom you have access.

Note: Documents with a status of **Archived** display only on the **Student Documents** screen **Documents** tab (see [“Student Documents”](#)).

The screenshot shows the dashboard interface with four main sections:

- Upcoming Due Dates:** A grid showing counts for 15-21 Days (23), 8-14 Days (29), < 8 Days (8), and Overdue (0).
- Caseload Due Dates:** A grid showing counts for 15-21 Days (1), 8-14 Days (1), and < 8 Days (1).
- Recently Created Documents:** A list of three documents: 2018-2019 Initial IEP, 2018-2019 Initial IEP, and 2018-2019 504 Plan, with a '+ New Document' link.
- Reports:** A list of three reports: Special Ed Events, Absence Thresholds by Date Range, and Student Immunization Summary, with a 'More reports' link.

Below these sections is a toolbar with '+ New Document' and 'Mark as Priority' buttons, and a table header with columns: Student, DOB, Grade, Case Manager, Document, Type, Status, Due Date, and Progress.

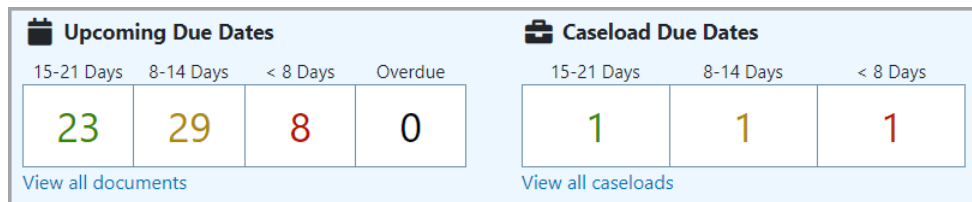
- **Upcoming Due Dates** – Displays the upcoming due dates for your documents within specified timeframes (see [“Upcoming Due Dates”](#)).
- **Caseload Due Dates** – Displays the upcoming due dates for your documents by caseload within specified timeframes. This area is used only by administrative users with access to multiple caseloads (for more information, see the *ProgressBook SpecialServices Administrator Guide*).
- **Recently Created Documents** – Displays your 3 most recently created documents as links to the overview version of the **Student Documents** screen as well as a **New Document** link that you can click to open the **Create New Document** window (see [“Creating a New Document”](#)).
- **Reports** – Displays your 3 most recently run reports as links to the report version of the **Dashboard** screen as well as a **More reports** link that you can click to access the StudentInformation Analytics Hub (see [“Reports”](#)).
- **New Document** – Click to open the **Create New Document** window (see [“Creating a New Document”](#)).
- **Mark as Priority** – Select the checkbox(es) for the document(s) you want to mark as priority (or, select the checkbox in the column header to select all documents), and then click **Mark as Priority**. Documents you mark as priority display as priority only for your user account.
- **!** – Indicates that a document has been marked as priority.
- **🔍** – Click to open the document filters (see [“Filters”](#)).
- Click **⚙️** to open the **Dashboard Preferences** window (see [“Dashboard Preferences”](#)).

Filtering Your Results

You can use the “[Upcoming Due Dates](#)” area or the “[Filters](#)” icon (🔍) to narrow the documents that display in the grid.

Upcoming Due Dates

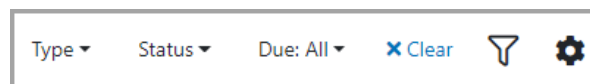
The **Upcoming Due Dates** area is composed of 4 boxes: **15-21 Days**, **8-14 Days**, **< 8 Days**, and **Overdue**. A number displays in each box to indicate the number of documents with upcoming due dates within that timeframe. Click any of the boxes to filter by that box’s category. To view all documents to which you have access, click **View all documents**.



Note: The **Caseload Due Dates** area displays upcoming due dates by caseload and is used only by administrative users with access to multiple caseloads. For more information, refer to the ProgressBook SpecialServices Administrator Guide.

Filters

On the right side of the **Dashboard** screen, click 🔍 to open the document filters. In the document filters area, you can select any combination of filter criteria to view documents that match only those criteria.



Type – In the drop-down list, select one or more document types. (To see a list of all available document types in SpecialServices, see “[SpecialServices Documents](#).”)


Status – In the drop-down list, select one or more document statuses (**Open**, **In Review**, and/or **Completed**).

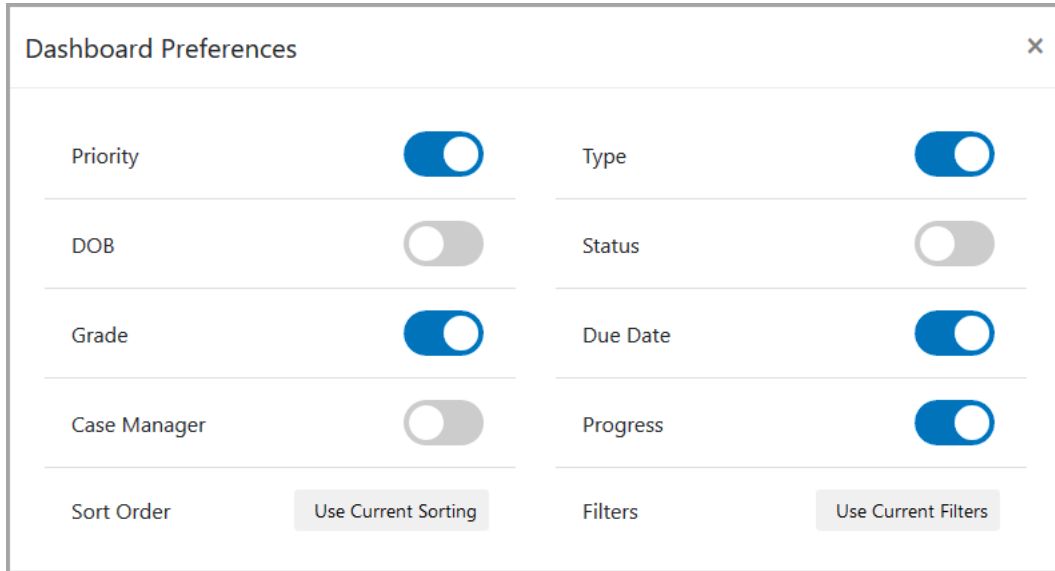
Due – In the drop-down list, select a due date range (**< 8 days**, **8-14 days**, **15-21 days**, **30 days**, **90 days**, or **Overdue**).

Note: Once you have selected a filter, 🔍 updates to 📏.

Note: To deselect a particular filter, click the filter. To clear all selected criteria in a particular drop-down list, scroll to the bottom of the list and click **Clear**. To clear all selected criteria in all drop-down lists, beside **Due**, click **Clear**.

Dashboard Preferences

The **Dashboard Preferences** window lets you set preferences that determine the type of information that displays for your documents. On the right side of the **Dashboard** screen, click . The **Dashboard Preferences** window opens.



Category	Toggle State	Category	Toggle State
Priority	On	Type	On
DOB	Off	Status	Off
Grade	On	Due Date	On
Case Manager	Off	Progress	On
Sort Order	Use Current Sorting	Filters	Use Current Filters

Toggle any category to display () or hide () columns for:

- Document **Priority**
- Student's birthdate (**DOB**)
- Student's **Grade** level
- Student's **Case Manager**
- Document **Type**
- Document **Status**
- Document **Due Date**
- Document **Progress**

Note: Click **Use Current Sorting** or **Use Current Filters** to save your current sort order or your current filters, respectively, for future sessions.

Student Documents




Navigation: SpecialServices > Student Documents > Documents tab

The **Student Documents** screen **Documents** tab is the main work area for your documents in SpecialServices.




- [“Accessing the Document Overview”](#)
- [“Filters”](#)
- [“Column Preferences”](#)
- [“SpecialServices Documents”](#)
- [“Creating a New Document”](#)
- [“Editing a Document”](#)
- [“Sending a Document for Review via the Frontline Collaboration Portal”](#)
- [“Include in EMIS”](#)
- [“Completing a Document”](#)
- [“Printing a Document”](#)
- [“Deleting a Document”](#)
- [“Renaming a Document”](#)

Documents		Recycle Bin									
+ New Document		! Mark as Priority		★ Include in EMIS		🗑 Delete				🔍 ⚙	
<input type="checkbox"/>	! Student	DOB	Grade	Case Manager	Document	Type	Include in EMIS	Status	Event Date	Due Date	Progress
<input type="checkbox"/>	! Barnes, Amanda	12/21/2004	10	Smiles, Mary	2020-2021 Initial IEP	IEP	★	Open		08/01/2020	<div style="width: 6%;"><div>6%</div></div>
<input type="checkbox"/>	Carson, Serena	05/05/2004	11	Smiles, Mary	2020-2021 Initial IEP	IEP	★	Open		07/28/2020	
<input type="checkbox"/>	! Corbin, John	08/29/2003	11	Masters, Paul	2020-2021 Initial IEP	IEP	★	Open		07/24/2020	
<input type="checkbox"/>	Miller, Casey	02/06/2008	07	Masters, Paul	2020-2021 Initial IEP	IEP	★	Completed	☒		
<input type="checkbox"/>	Nelson, Amber	03/03/2011	04	Brown, Kendra	2020-2021 Initial IEP	IEP	★	Completed	☒	04/16/2020	
<input type="checkbox"/>	Stevenson, Aaron	07/05/2015	PS	Smiles, Mary	2019-2020 Initial ETR	ETR	★	Completed			

- **Documents tab** – Displays a grid of all the documents for the students to whom you are assigned.
- **New Document** – Click to open the **Create New Document** window (see [“Creating a New Document”](#)).
- **Mark as Priority** – Select the checkbox(es) for the document(s) you want to mark as priority (or, select the checkbox in the column header to select all documents), and then click **Mark as Priority**. Documents you mark as priority display as priority only for your user account.
- **Include in EMIS** – Select the checkbox(es) for the document(s) you want to include in the EMIS extract (or, select the checkbox in the column header to select all documents), and then click **Include in EMIS** (see [“Include in EMIS”](#)).

-  – Indicates that an open document or a document that has been sent for review via the Frontline Collaboration Portal will be included in the EMIS extract pending the document's completion.
-  – Indicates that a completed document is included in the EMIS extract.
-  – Indicates that a document has been marked as priority.
- **Delete** – Select the checkbox(es) for the document(s) you want to delete (or, select the checkbox in the column header to select all documents), and then click **Delete** (see [“Deleting a Document”](#)).
- **Recycle Bin tab** – Displays your recently deleted documents. You can restore these documents if necessary (see [“Recycle Bin Tab”](#)).

Note: *This tab displays only if you have the appropriate security privileges.*

-  – Indicates that a document that has been sent for review is in the process of being published to the Frontline Collaboration Portal or that a completed document is in the process of being published to permanent storage.
-  – Click to open the document filters (see [“Filters”](#)).
-  – Click to open the **Column Preferences** window (see [“Column Preferences”](#)).

Accessing the Document Overview

On any screen where documents display, click the name of a document to view it on the document overview version of the **Student Documents** screen.

<input type="checkbox"/>	! ▾	Student	Grade	Document	Type	Due Date	Progress
<input type="checkbox"/>		Haynes, Sharon	5	2019 - 2020 RIEP	IEP	10/05/2019 3 days overdue	100%
<input type="checkbox"/>		Barker, Sabrina	5	2019 - 2020 RIEP	IEP	10/07/2019 1 day overdue	100%

SpecialServices > Student Documents

Haynes, Sharon ACCESS Middle School ID: 3201021 Grade: 5 Case Mgr: unassigned Homeroom: Casey, Marlene

2019 - 2020 RIEP > ! Mark as Priority Print Preview + Add Additional Forms ✓ Complete Delete


Due: 10/05/2019 Created By: SysLoad

Individualized Education Plan Overview 100%

- Cover Page ✓ Completed
- 1. Future Planning ✓ Completed
- 2. Special Instructional Factors ✓ Completed
- 3. Profile ✓ Completed
- 4. Extended Services ✓ Completed
- 6. Measurable Annual Goals 1 Goal ✓ Completed
- 7. Specially Designed Services ✓ Completed
- 8. Transportation ✓ Completed
- 9. Nonacademic Services ✓ Completed
- 10. General Factors ✓ Completed

Note: For information on editing a document on this screen, see [“Editing a Document.”](#)

Filters

On the right side of the **Student Documents** screen **Documents** tab, click  to open the document filters. In the document filters area, you can select any combination of filter criteria to view documents that match only those criteria.

Student Name ×
Type ▾
Status ▾
Due: All ▾
Event Date: 07/01/2019 - 06/30/2020 ▾
✕ Clear

- **Student Name** – In the field, enter 2 or more letters of a student’s first or last name.
- **Type** – In the drop-down list, select one or more document types. (To see a list of all available document types in SpecialServices, see [“SpecialServices Documents.”](#))

- **Status** – In the drop-down list, select one or more document statuses (**Open, In Review, Completed, Archived, and/or Include EMIS**).

Note: The **Status** of a document automatically updates to **Archived** when the due date of the document falls prior to the past 3 years. **Archived** documents do not display on the **Dashboard** screen (see “[Dashboard](#)”).

- **Due** – In the drop-down list, select a due date range (**< 8 days, 8-14 days, 15-21 days, 30 days, 90 days, or Overdue**).
- **Event Date** – In the drop-down list, enter or select a **Begin** and **End** date. (The **Event Date** filter displays the date range of the current school year by default. To clear the dates you entered and restore the default date range, click **Restore Defaults**.)

Note: Once you have selected a filter,  updates to .

Note: To deselect a particular filter, click the filter. To clear all selected criteria in a particular drop-down list, scroll to the bottom of the list and click **Clear**. To clear all selected criteria in all drop-down lists, beside **Due**, click **Clear**.

Column Preferences

The **Column Preferences** window lets you set preferences that determine the type of information that displays for your documents. On the right side of the **Student Documents** screen

Documents tab, click .

The **Column Preferences** window opens.

Column Preferences
×

Priority <input checked="" type="checkbox"/>	Type <input checked="" type="checkbox"/>
DOB <input type="checkbox"/>	Include in EMIS <input checked="" type="checkbox"/>
Grade <input checked="" type="checkbox"/>	Status <input type="checkbox"/>
Case Manager <input type="checkbox"/>	Due Date <input checked="" type="checkbox"/>
Event Date <input type="checkbox"/>	Progress <input checked="" type="checkbox"/>
Sort Order <input type="button" value="Use Current Sorting"/>	Filters <input type="button" value="Use Current Filters"/>

Toggle any category to display () or hide () columns for:

- Document **Priority**

Student Documents

- Student's birthdate (**DOB**)
- Student's **Grade** level
- Student's **Case Manager**
- Document **Event Date**
- Document **Type**
- **Include in EMIS**
- Document **Status**
- Document **Due Date**
- Document **Progress**

Note: Click **Use Current Sorting** or **Use Current Filters** to save your current sort order or your current filters, respectively, for future sessions.

Special Services Documents

- *“Individualized Education Plan (IEP)”*
- *“Evaluation Team Report (ETR)”*
- *“504 Plan (504)”*
- *“Written Education Plan (WEP)”*
- *“Prior Written Notice (PWN)”*
- *“Progress Report (PR)”*
- *“Parent Invitation (PR-02)”*
- *“Summary of Performance (OP-08)”*
- *“Manifestation Determination (PR-03)”*
- *“Service Plan (SP)”*
- *“Written Acceleration Plan (WAP)”*
- *“Behavior Intervention Plan (BIP)”*
- *“Due Process (DP)”*
- *“Other Meeting”*

Individualized Education Plan (IEP)

- **Initial IEP (IIEP)** – Includes the forms required for students who are not already enrolled in an IEP. For all subsequent IEPs, create the applicable RIEP document.
- **Amended IEP (AIEP)** – Includes the forms required for students who are already enrolled in an IEP and for whom modifications to the IEP are required.
- **Review IEP (RIEP)** – Includes the forms required for students who are already enrolled in an IEP and for whom a periodic review determines that a new IEP is required.
- **Transfer IEP (TIEP)** – Includes the forms required for students who are already enrolled in an IEP and who transferred to their current school district from a different school district. Select this document only if your district will accept the student’s transferred IEP without modifying it. If your district wants to make modifications to the student’s IEP, create an IIEP document.

Evaluation Team Report (ETR)

- **Initial Evaluation Team Report (IETR)** – Includes the forms required for students who are not already enrolled in an ETR. This document is dynamic and can be used for preschool or school-aged students for whom you want to begin the initial evaluation to determine eligibility for enrollment in an ETR. For all subsequent ETRs, create the applicable RETR document.
- **Reevaluation Team Report (RETR)** – Includes the forms required for students who are already enrolled in an ETR and for whom a reevaluation is required. This document is dynamic and can be used for preschool or school-aged students who are subject to reevaluation.

- **Transfer ETR (RETR)** – Includes the forms required for students who already receive ETR services and who transferred to their current school district from a different school district. Select this document only if your district will accept the student’s transferred ETR without modifying it. If your district wants to make modifications to the student’s ETR, create an IETR document.

504 Plan (504)

- **504 Plan (504P)** – Includes the forms required for students who are enrolled in a 504 Plan.
- **504 Eval (504E)** – Includes the forms required for students for whom you want to begin the initial evaluation to determine eligibility for enrollment in a 504 Plan.
- **504 Referral (504R)** – Form used to refer students to be evaluated to determine eligibility for enrollment in a 504 Plan.
- **504 Notification (504N)** – Form used to notify parent(s)/guardian(s) of a meeting regarding their child’s 504 Plan.
- **504 Grievances (504G)** – Form used by a student or parent/guardian to express dissatisfaction with the services the student receives while enrolled in a 504 Plan.
- **504 Prior Written Notice (504PWN)** – Required form used to inform parent(s)/guardian(s) of the actions your district is taking in regard to services their child receives while enrolled in a 504 Plan.
- **504 Consent (504C)** – Form used to obtain parent/guardian consent for their child to be evaluated to determine eligibility for enrollment in a 504 Plan.

Written Education Plan (WEP)

- **Written Education Plan (WEP)** – Includes the forms required for students who are enrolled in a WEP.
- **Gifted WEP - (NW - ELEM)** – Custom WEP created for Northwest Elementary School.
- **Gifted WEP - (NW - MS)** – Custom WEP created for Northwest Middle School.
- **Gifted WEP - (Darke County ESC)** – Custom WEP created for Darke County Educational Service Center.
- **Gifted WEP - (North Point ESC)** – Custom WEP created for North Point Educational Service Center.

Prior Written Notice (PWN)

The **Prior Written Notice** form (PR-01) is a required form used to inform parent(s)/guardian(s) of the actions your district is taking in regard to a student’s special education services.

Progress Report (PR)

- **Goals Progress Report (OP-6A)** – Form that provides a **Goal** field, an area for commenting on the student’s progress toward their goal, and an objective/benchmark section that lets you add as many objectives/benchmarks as applicable.

- **Transition Progress Report (OP-6B)** – Form used to track the student’s progress toward their transition goals. This form provides 3 **Goal** fields, an area for commenting on the student’s progress toward each of their goals, and 3 **Comment** fields.
- **Written Education Plan Progress Report (WEP PR)** – This PR form is used to track the student’s progress while enrolled in a WEP (see “*Written Education Plan (WEP)*”).
- **Transition and Goals/Obj by Date Progress Report (Transition & Goals/Obj)** – This PR contains both the **OP-6A** form and the **OP-6B** form. Select this document only for students who will turn 14 years old before the end of their current IEP.

Parent Invitation (PR-02)

The **Parent Invitation** form (PR-02) is a required form used to invite parent(s)/guardian(s) to any meeting involving the educational welfare of a student receiving special education services.

Summary of Performance (OP-08)

The **Summary of Performance** form (OP-08) is used to report students who are exiting special education and (for students age 14 or older) information regarding assistance in meeting postsecondary goals.

Manifestation Determination (PR-03)

The **Manifestation Determination** form (PR-03) is a required form used to assess whether a student’s improper conduct in school is related to their disability.

Service Plan (SP)

- **Initial Individual Service Plan (IISP)** – Includes the forms required for students who receive special education services from a nonpublic school. Select this document only for students who are not already enrolled in an SP. For all subsequent SPs, create the applicable RISP document.
- **Review Individual Service Plan (RISP)** – Includes the forms required for students who are already enrolled in an SP and for whom an annual review has determined that a new SP is required.

Written Acceleration Plan (WAP)

The **Written Acceleration Plan** (WAP) document contains all of the forms required for students who receive accelerated services.

Behavior Intervention Plan (BIP)

The **Behavior Intervention Plan** (BIP) document contains all of the forms required for students who will receive special education services in the future.

Due Process (DP)

The **Due Process** (DP or PR-08) form is used to file a complaint about the student's special services determination.

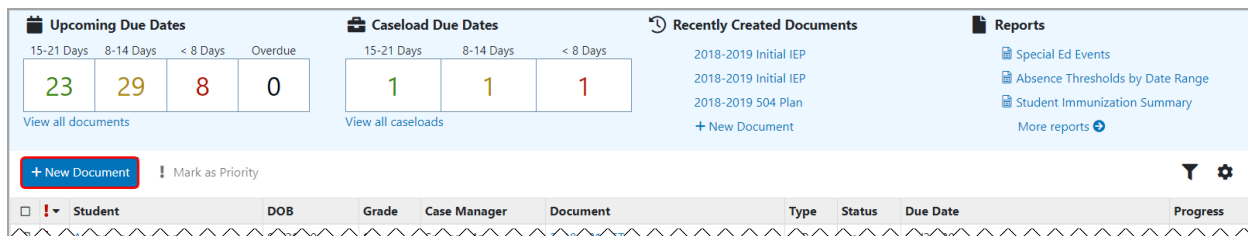
Other Meeting

The **Other Meeting** document does not contain any forms by default. However, you can upload attachments relevant to the meeting or add additional forms as necessary. Select this document only for other purposes that cannot be covered by any other document type.

Creating a New Document

Note: You must have the appropriate security privileges to create a new document.

1. On the **Dashboard** screen, **Student Documents** screen **Dashboard** tab, or **Student Profile** screen **Special Education** tab, click **New Document**.



2. On the **Create New Document** window that opens, in the **Student** field, enter 2 or more letters of a student's first or last name. Then, in the results list that displays, select the appropriate student.
3. In the **Document** drop-down list, select the document you want to create.

Note: For more information on the documents available in *SpecialServices*, see [“SpecialServices Documents.”](#)

4. (Conditional) If you selected an IEP, ETR, WEP, PR, or SP in [step 3](#), the **Type** drop-down list displays. In the drop-down list, select the type of document you want to create.
5. (Optional) The **Name** field displays the current school year and document type by default. Enter a different document name if desired.
6. (Optional) In the **School Year** drop-down list, the current school year displays. Select a different school year if desired.
7. (Optional) In **Grade Level** drop-down list, the student's current grade level displays. Select a different grade level if desired.
8. Enter or select a **Due Date** in the field.
9. (Optional) If you want to create this document using information from an existing document, in the **Copy From** drop-down list, select the appropriate document.
10. (Optional) If you want to mark this document as priority, select the **Mark as Priority** checkbox. Documents you mark as priority display as priority only for your user account.

11. (Conditional) If you selected an IEP, ETR, SP, 504P, or MD in [step 3](#), the **Exclude from EMIS** checkbox displays. Select the checkbox if you want to exclude the document from the EMIS extract. If you do not select the checkbox, the document is included in the EMIS extract.

Note: All other document types are excluded from the EMIS extract by default.

Note: To manually include or exclude a document from the EMIS extract after its creation, see [“Include in EMIS.”](#)

12. Click **Create**.

The screenshot shows a 'Create New Document' dialog box with the following fields and options:

- Student:** Acosta, Brooke (with a close button)
- Document:** Individualized Education Plan (dropdown)
- Type:** Initial IEP (dropdown)
- Name:** 2019-2020 Initial IEP (text input)
- School Year:** 2019-2020 (dropdown)
- Grade Level:** 12 - 12 (dropdown)
- Due Date:** 10/15/2020 (calendar icon)
- Copy From:** Select Document to Copy... (dropdown)
- Mark as Priority:**
- Exclude from EMIS:**
- Buttons:** Cancel, Create (highlighted with a red border)

The **Create New Document** window closes, and the document overview version of the **Student Documents** screen displays. You can now edit any section of the document as desired (see [“Editing a Document”](#)).

Editing a Document

The document overview version of the **Student Documents** screen displays an outline of the current document with each form as an editable section.

- [“Editing a Form”](#)
- [“Quick Document Menu”](#)
- [“Adding Additional Forms”](#)
- [“Adding Form Tabs”](#)
- [“Collaborating on a Form”](#)
- [“Uploading Attachments”](#)
- [“Importing Contacts”](#)
- [“Import From Document”](#)
- [“Electronic Signatures”](#)
- [“Completing a Form”](#)

SpecialServices » Student Documents

Acosta, Brooke High School ID: 4309035 Grade: 12 Case Mgr: unassigned Homeroom: Rice, Steve Search Students

2019-2020 Initial IEP > Mark as Priority Print Preview + Add Additional Forms Delete

Due: 10/01/2019 Created By: Masters, Paul

Individualized Education Plan Overview

Cover Page	Edit
1. Future Planning	Start
2. Special Instructional Factors	Start
3. Profile	Start
4. Extended Services	Start
6. Measurable Annual Goals	Start
7. Specially Designed Services	Start
8. Transportation	Start
9. Nonacademic Services	Start
10. General Factors	Start
11. Least Restrictive Environment	Start
12. Statewide And District Testing	Start
13. Exemptions	Start
14. Meeting Participants	Start

- – Click to modify the name of this document. Enter the desired document name in the field. Your changes save automatically.
- **Mark as Priority** – Click to mark this document as priority. The documents you mark as priority display as priority only for your user account.
- **Print Preview** – Click to view the print preview version of the screen where you can review and print this document (see [“Printing a Document”](#)).

- **Add Additional Forms** – Click to open the **Add Additional Forms** window (see “[Adding Additional Forms](#)”).
- **Complete** – Click to complete this document (see “[Completing a Document](#)”).

Note: This option displays only when all forms for the document have been marked as complete.

Note: You must have the appropriate security privileges to complete a document.

- **Delete** – Click to delete this document (see “[Recycle Bin Tab](#)”).

Note: The **Delete** icon displays only if you have the appropriate security privileges.

Editing a Form

To edit a form, on the document overview version of the **Student Documents** screen, click the name of the form. Or, click **Start**.

Note: If the form has been modified previously, **Edit** displays instead of **Start**.

The screenshot shows the 'Student Documents' interface for a student named Acosta, Brooke. The document is titled '2019-2020 Initial IEP'. Below the title, there are options to 'Mark as Priority', 'Print Preview', 'Add Additional Forms', and 'Delete'. The document is due on 01/01/2020 and was created by Masters, Paul. The main content is an 'Individualized Education Plan Overview' with a table of forms:

Form Name	Action
Cover Page	Start
1. Future Planning	Start
2. Special Instructional Factors	Start
3. Profile	Start

The edit version of the **Student Documents** screen displays.

SpecialServices - Student Documents

Barker, Sabrina SADoc High School ID: 4301022 Grade: 10 Case Mgr: unassigned Homeroom:

2019 - 2020 IIEP > Cover Page > Child's Information - ✓ Mark as Completed Print Preview

Due: 10/08/2019 Created By: SysLoad

+ New Attachment

Name: Barker, Sabrina ID Number: 4301022 Date of Birth: 11/13/2004

Street: 1295 Highland Road Gender: F Grade: 10 / 11

City: SADoc State: OH Zip: 44320

District of Residence: SADoc County of Residence: Summit District of Service: SADoc

Is the child in preschool? Yes No

Will the child be 14 years old before the end of this IEP? Yes No

Is the child younger than 14 years of age but has transition and postsecondary goal information? Yes No


Is the child a ward of the state? Yes No

IEP by third birthday? (If transitioning from Part C services) Yes No

Additional Information

Additional Information...


<< Overview Parent/Guardian Information >

-  – Click to modify the name of this document. Enter the desired document name in the field. Your changes save automatically.
- Cover Page > **Child's Information** – Click the name of a form section to expand a drop-down list that displays all sections of the form. Click a section name to view that section.

Note: This drop-down list displays only if a form has multiple sections.


- **Mark as Completed** – Click to mark this form as completed (see [“Completing a Form”](#)).

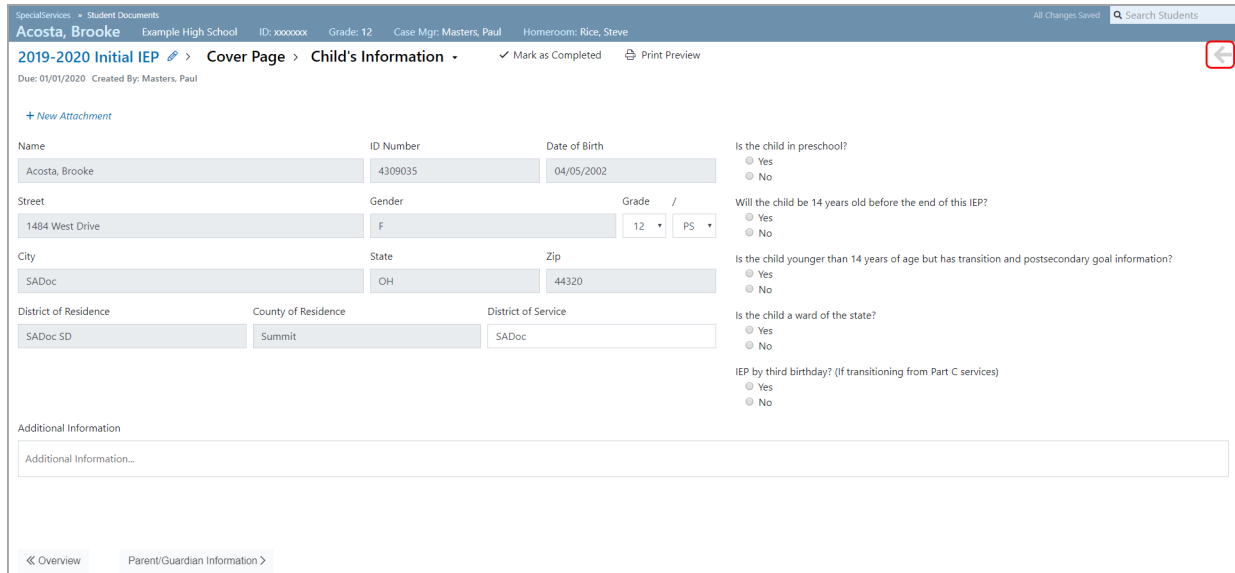
Note: A form can be completed only if data has been entered on it.

- **Print Preview** – Click to view the print preview version of the screen where you can review and print this document (see [“Printing a Document”](#)).
- **New Attachment** – Click to upload an attachment to this form (see [“Uploading an Attachment to an Individual Form”](#)).
- Click  to expand the Quick Document Menu (see [“Quick Document Menu”](#)).

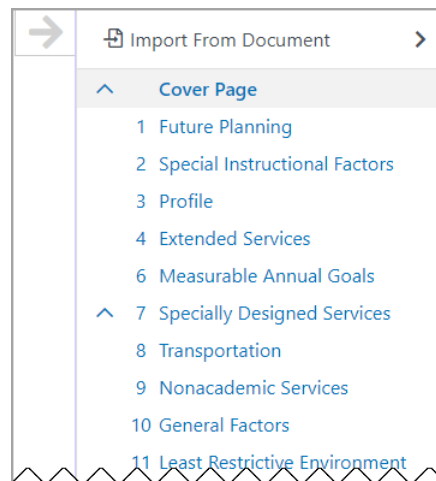
Quick Document Menu




The Quick Document Menu lets you navigate to any form or form section in a document. To expand the Quick Document Menu, on the right side of the edit version of the **Student Documents** screen, click

.



The Quick Document Menu expands. Click the name of a form or form section to navigate directly to that form or form section.

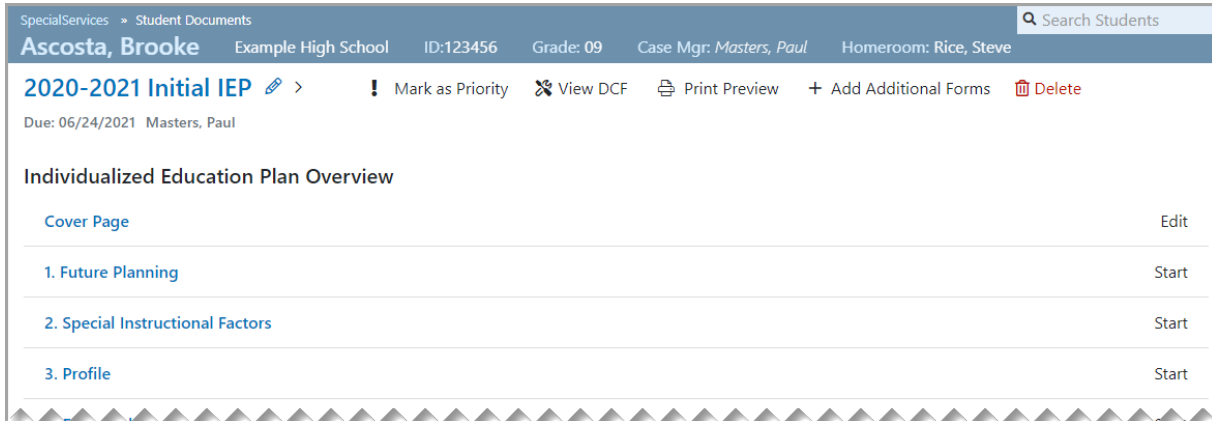


-  – Click to collapse the Quick Document Menu.
- **Import From Document** – Click **Import From Document** to import information from another document into the current document (see *“Import From Document”*).
-  – Click to expand the list the sections (if any) on this form.
-  – Click to minimize the list of sections (if any) on this form.

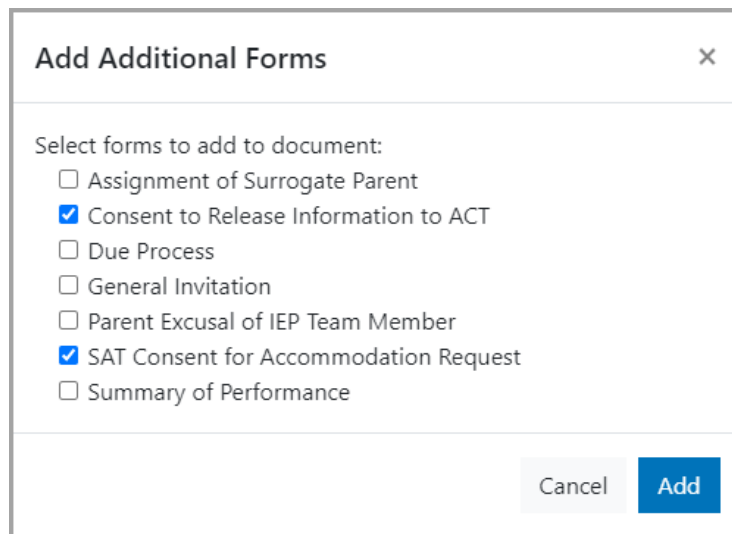
Adding Additional Forms

You can add additional (i.e., optional) forms to a document on the document overview version of the **Student Documents** screen.

1. On the document overview version of the **Student Documents** screen, click **Add Additional Forms**.



2. On the **Add Additional Forms** window that opens, beside the name of each additional form you want to add to the document, select the checkbox.
3. Click **Add**.



On the document overview version of the **Student Documents** screen, the additional forms display.

SpecialServices > Student Documents All changes saved

Ascosta, Brooke Example High School ID:123456 Grade: 09 Case Mgr: *Masters, Paul* Homeroom: Rice, Steve

2020-2021 Initial IEP > Mark as Priority View DCF Print Preview + Add Additional Forms Delete

Due: 06/24/2021 Masters, Paul

Individualized Education Plan Overview

Cover Page	Edit
1. Future Planning	Start
2. Special Instructional Factors	Start
3. Profile	Start
4. Extended Services	Start
6. Measurable Annual Goals	2 Goal Edit
7. Specially Designed Services	Start
8. Transportation	Start
9. Nonacademic Services	Start
10. General Factors	Start
11. Least Restrictive Environment	Start
12. Statewide And District Testing	Start
13. Exemptions	Start
14. Meeting Participants	Start
15. Signatures	Start
Prior Written Notice	Start
Parent Invitation	Start
Special Education Events	Start
Medicaid Parental Consent	Start
SAT Consent for Accommodation Request	Start
Consent to Release Information to ACT	Start
Attachments	

Note: To remove an additional form from a document, beside the name of the form, click .

Adding Form Tabs

On some forms, you can add tabs so that you can enter additional information on the form. For example, you can add multiple **Goal** tabs on the **Measurable Annual Goals** form of an IEP.

1. On the edit version of the **Student Documents** screen, click **New [Tab Name]**.

The screenshot shows the 'Measurable Annual Goals' form for 'Acosta, Brooke' at 'Example High School'. The form is titled '2019-2020 Initial IEP' and is currently on the '6 Measurable Annual Goals' tab. The 'Goal' tab is selected, and a '+ New Goal' button is highlighted with a red box. The form includes fields for 'NUMBER:' (containing '1') and 'AREA:', and a section for 'PRESENT LEVEL OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE'.

Note: Tabs are not available on all forms.

Note: You can add a new tab only if you have entered information on the current tab.

The new tab displays and **New [Tab Name]** displays with an underline.

The screenshot shows the 'Measurable Annual Goals' form with the 'Goal' tab selected. The '+ New Goal' button is highlighted with a yellow box. The 'NUMBER:' field is empty, and the 'PRESENT LEVEL OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE' section is also empty.


2. Enter information on the tab as desired.

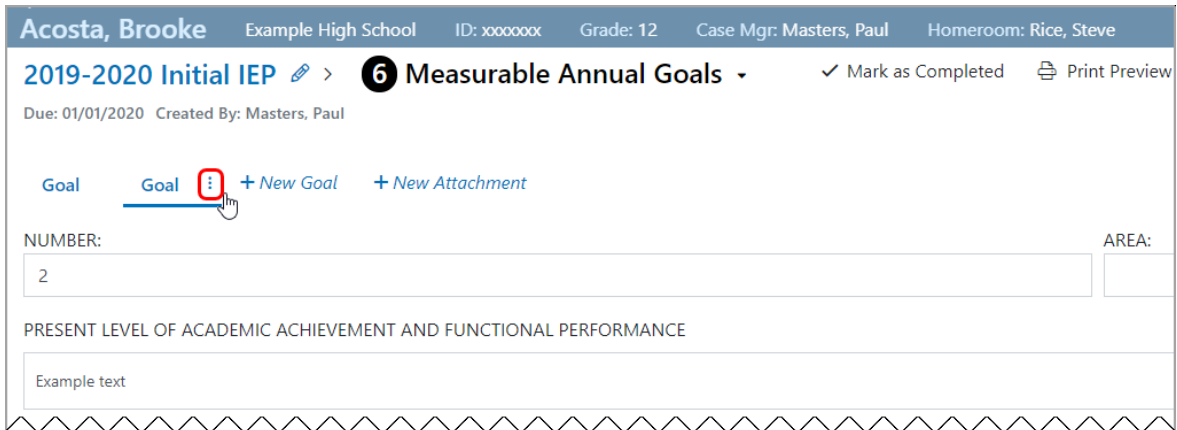
Your changes save automatically, and the tab name updates to reflect the category of information added.

The screenshot shows the 'Measurable Annual Goals' form with the 'Goal' tab selected. The 'Goal' tab is highlighted with a yellow box. The 'NUMBER:' field contains the number '2', and the 'PRESENT LEVEL OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE' section contains the text 'Example text'.

Note: For more information on copying, renaming, arranging, or deleting form tabs, see [“Form Tab Options.”](#)

Form Tab Options


On the edit version of the **Student Documents** screen, on any form where tabs display, click  beside the name of a tab to view options for that tab.



Acosta, Brooke Example High School ID: xxxxxx Grade: 12 Case Mgr: Masters, Paul Homeroom: Rice, Steve

2019-2020 Initial IEP > **6** Measurable Annual Goals - ✓ Mark as Completed Print Preview

Due: 01/01/2020 Created By: Masters, Paul

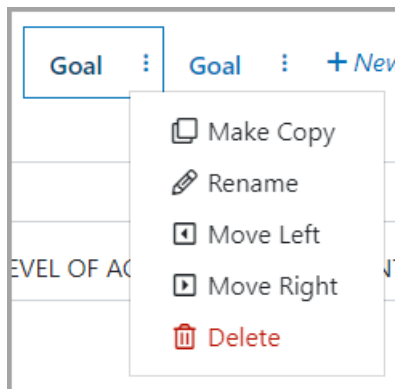
Goal Goal  + New Goal + New Attachment

NUMBER: 2 AREA:

PRESENT LEVEL OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE

Example text

The form tab options drop-down list displays.



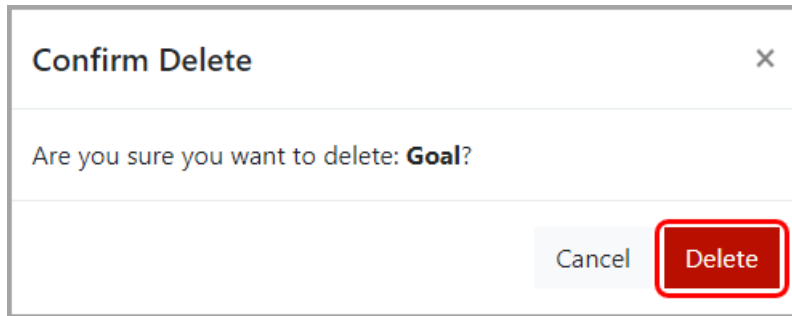
- **Make Copy** – Click to copy the information on this tab to a new tab. The new tab name displays as **[Original Tab Name] (copy)**.
- **Rename** – Click to rename this tab. You can also rename a tab by double-clicking the tab name.
- **Move Left** – Click to move this tab to the left.

***Note:** This option displays only if there are 1 or more tabs to the left of the current tab.*

- **Move Right** – Click to move this tab to the right.

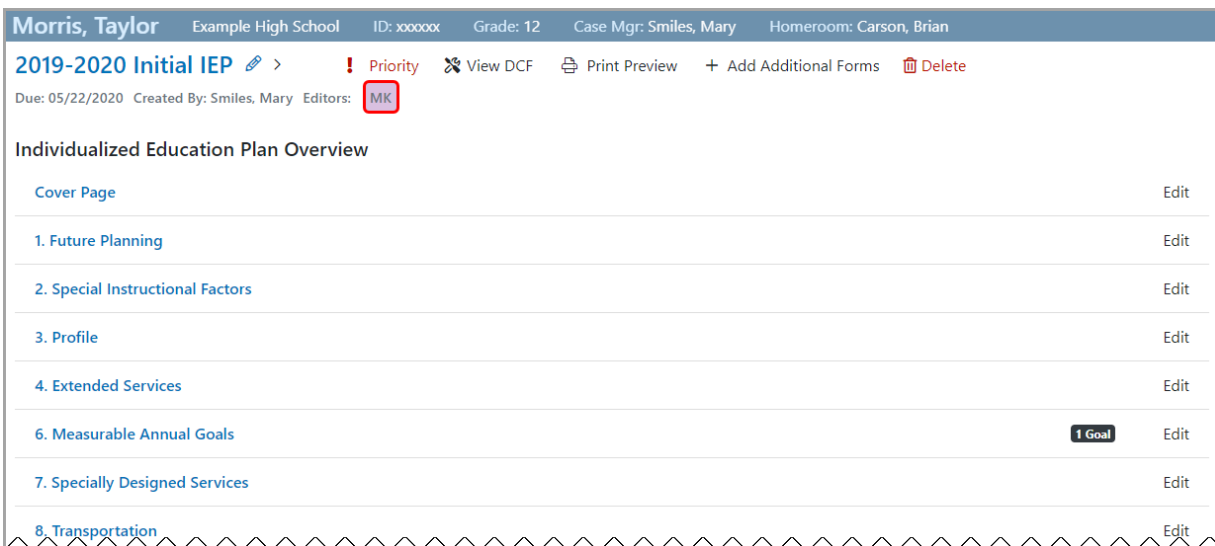
***Note:** This option displays only if there are 1 or more tabs to the right of the current tab.*

- **Delete** – Click **Delete** to delete this tab. On the **Confirm Delete** window that opens, click **Delete**.




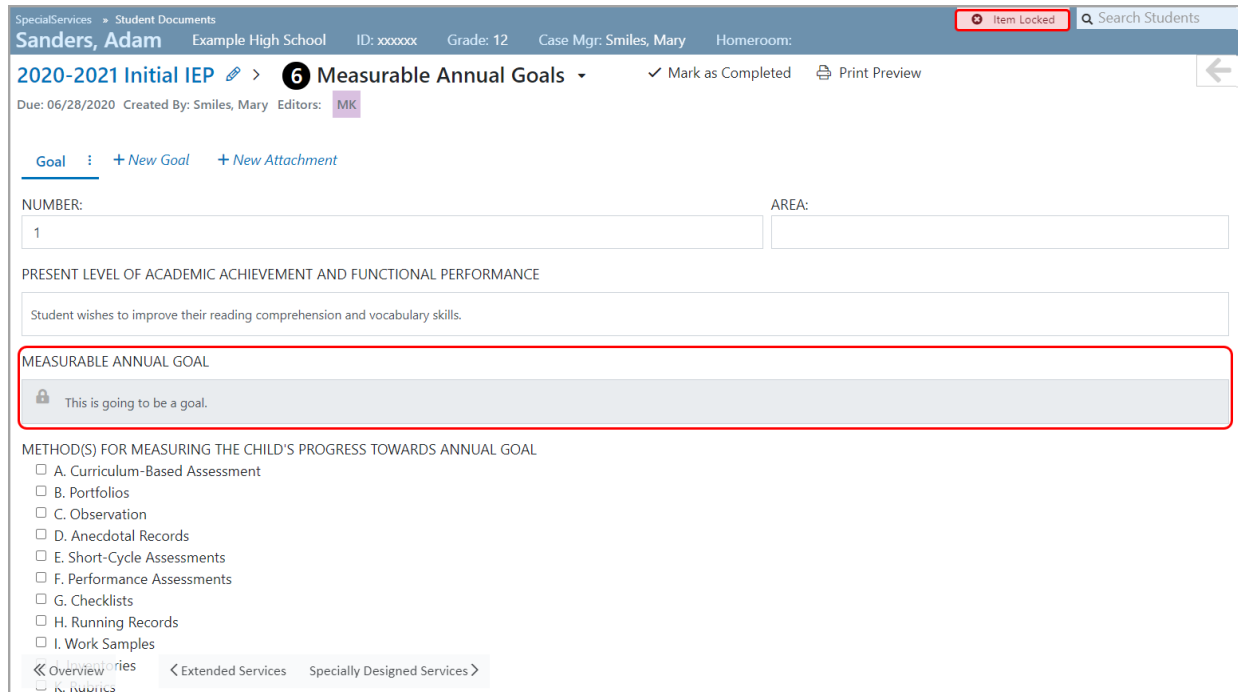
Collaborating on a Form

You and other staff members can work on a form at the same time. When another staff member is working on the same form as you, on the document overview and edit versions of the **Student Documents** screen, an icon displays with that staff member's initials.



Note: Hover your cursor over the icon to view the staff member's full name.

If a staff member is working on the same form section as you,  displays in the field they are currently editing, the section is grayed out, and the **Item locked** message displays on the top-right corner of the screen.



The screenshot shows the '2020-2021 Initial IEP' form for Adam Sanders. The 'Measurable Annual Goals' section is highlighted with a red box. A lock icon and the text 'Item Locked' are visible in the top right corner of the interface. The goal text reads: 'This is going to be a goal.' Below the goal, there is a list of methods for measuring progress, including Curriculum-Based Assessment, Portfolios, Observation, Anecdotal Records, Short-Cycle Assessments, Performance Assessments, Checklists, Running Records, and Work Samples.

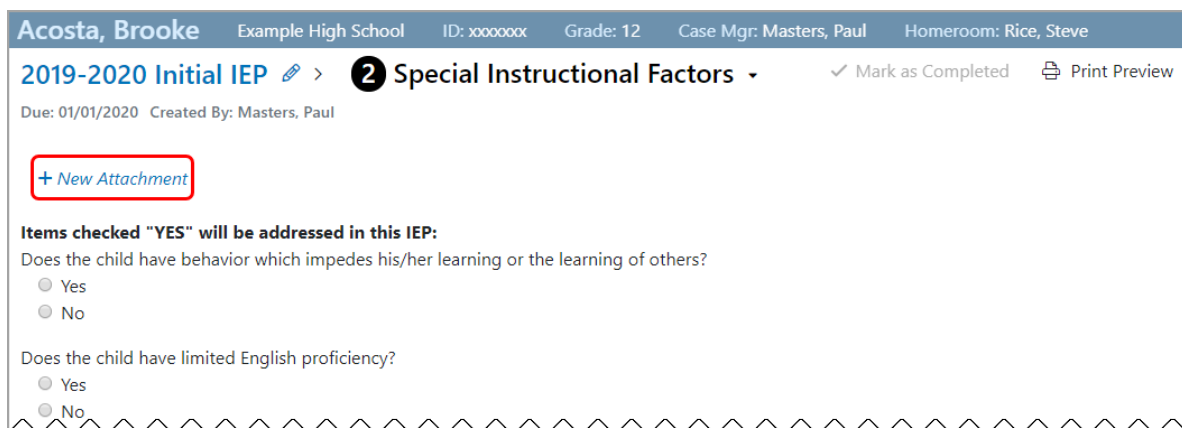
Uploading Attachments

You can upload attachments at the form level or at the document level.

- [“Uploading an Attachment to an Individual Form”](#)
- [“Uploading an Attachment to an Entire Document”](#)

Uploading an Attachment to an Individual Form

1. On the edit version of the **Student Documents** screen, click **New Attachment**.



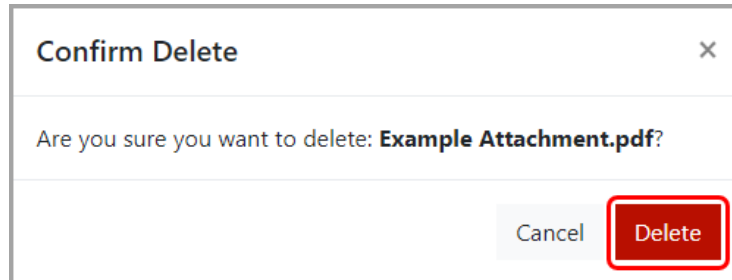
The screenshot shows the '2019-2020 Initial IEP' form for Brooke Acosta. The 'Special Instructional Factors' section is highlighted with a red box. A red box highlights the '+ New Attachment' button. Below the button, there are two questions with radio button options: 'Does the child have behavior which impedes his/her learning or the learning of others?' and 'Does the child have limited English proficiency?'. Both questions have 'Yes' and 'No' options.

2. On the window that opens, locate and open the attachment you want to upload.

The attachment uploads and displays with  at the top of the screen.



Note: To remove an attachment from a form, hover your cursor over the attachment name, and then click **X**. On the **Confirm Delete** window that opens, click **Delete**.



Uploading an Attachment to an Entire Document

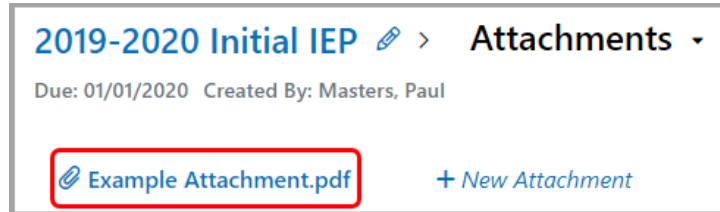
1. On the document overview version of the **Student Documents** screen, click **Attachments**.




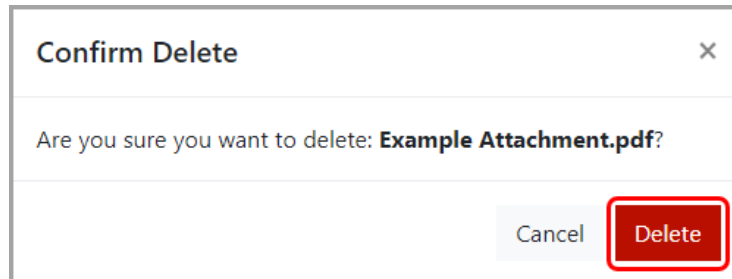
The **Attachments** section of the document displays.

2. Click **New Attachment**.
3. On the window that opens, locate and open the attachment you want to upload.

The attachment uploads and displays with  at the top of the screen.



Note: To remove an attachment from a form, hover your cursor over the attachment name, and then click . On the **Confirm Delete** window that opens, click **Delete**.

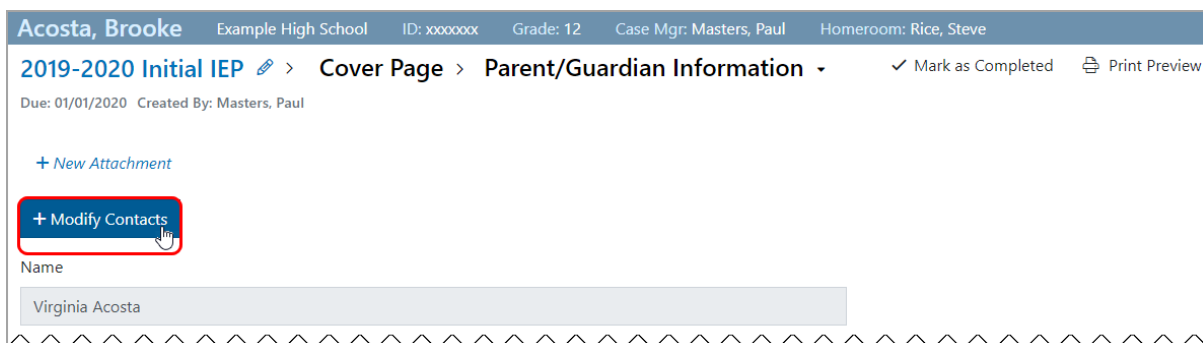


Importing Contacts

You can import contacts from StudentInformation on the **Cover Page** of IEPs, ETRs, 504Ps, 504Es, SPs, and BIPs.

Note: If the form on which you are importing contacts is blank, proceed to [step 3](#).

1. On the edit version of the **Student Documents** screen, on the **Cover Page** of the desired document, in the **Parent/Guardian Information** section, click **Modify Contacts**.

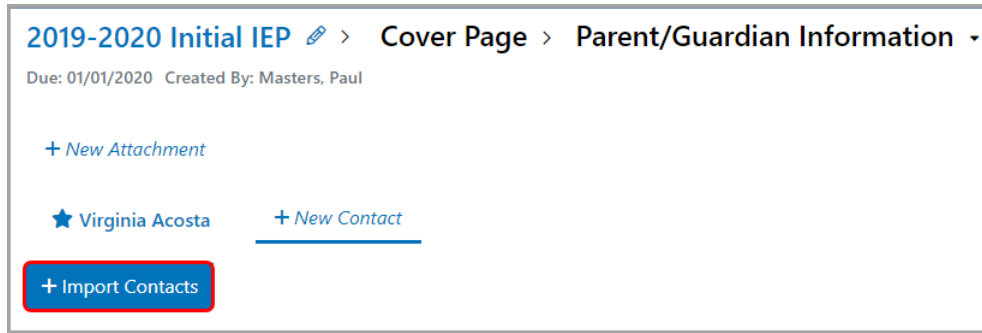


Tabs display for each of the available contacts.

2. Complete one of the following:
 - To add a new contact, click **New Contact**.
 - To replace an existing contact, click the tab for that contact.

Note: The student's primary contact is denoted by .

3. Click **Import Contacts**.

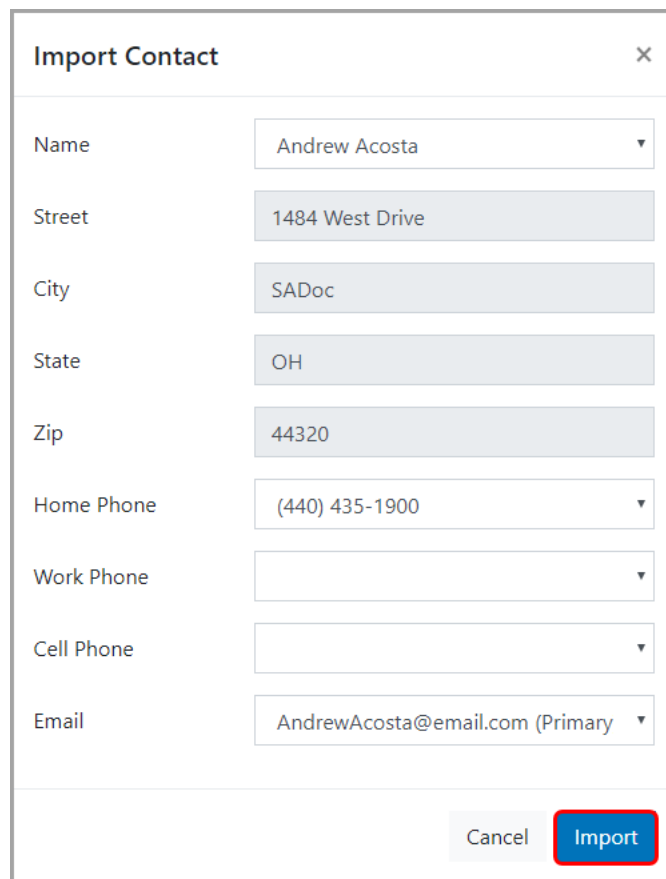


4. On the **Import Contact** window that opens, in the **Name** drop-down list, select the name of the contact you want to import.

Contact information displays.

5. Review the information. If there is no information for a particular section, the section remains blank. If there are multiple options for a section (e.g., multiple **Email** addresses), select the desired option from the drop-down list.

6. Click **Import**.

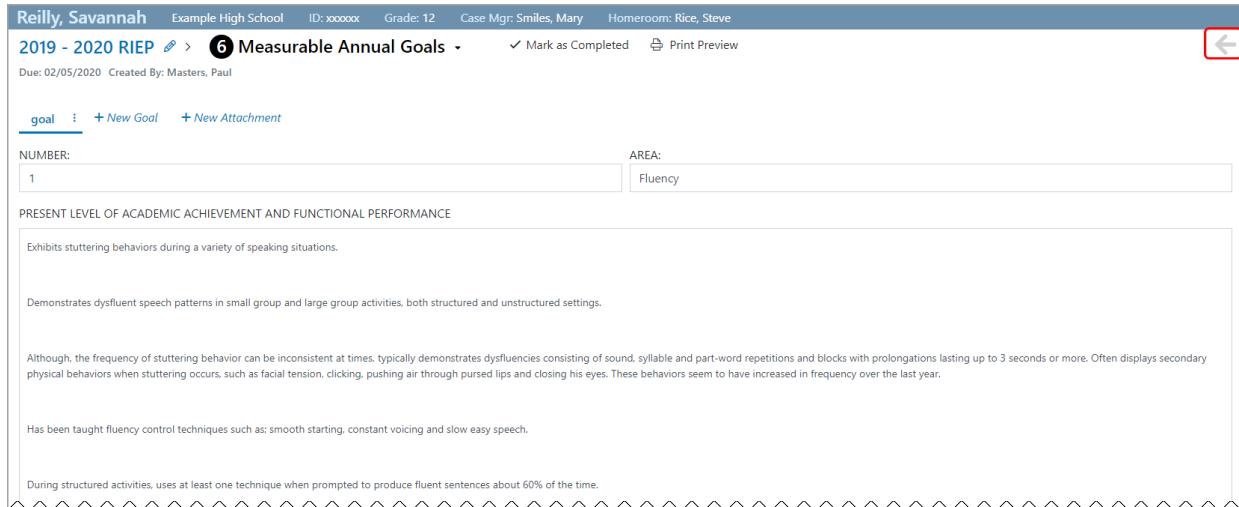


If you added a new contact, the contact now displays on a new tab in the **Parent/Guardian** section. If you replaced an existing contact, the new contact (instead of the previous contact) now displays on the current tab.

Import From Document

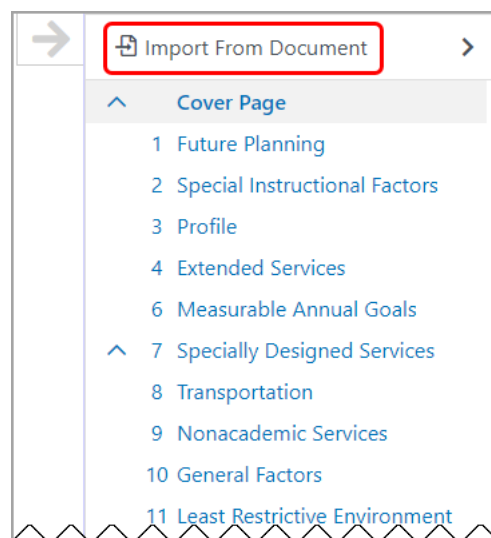
If enabled by your administrator, you can use the **Import From Document** area in the Quick Document Menu to import information from another document into the current document.

1. On the edit version of the **Student Documents** screen, click .



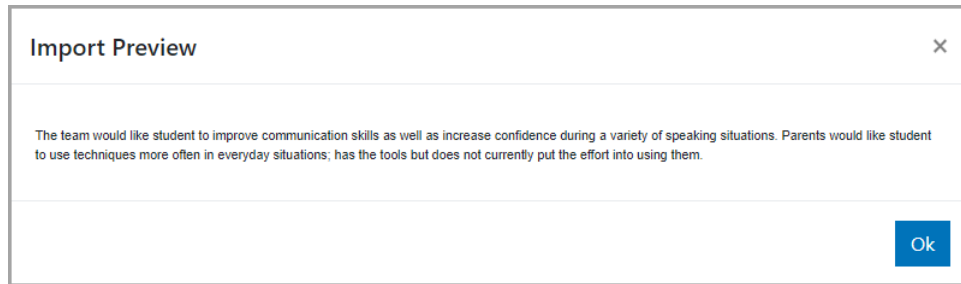
The Quick Document Menu expands.

2. Click **Import From Document**.



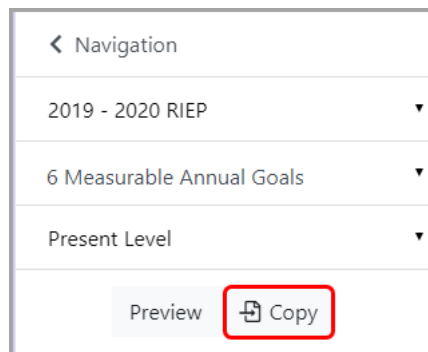
3. In the **Select a Document** drop-down list, select the document from which you want to import information.
4. In the **Select a Section** drop-down list, select the document form and section from which you want to import information.
5. In the **Field** drop-down list, select the field from which you want to import information.
6. (Optional) Click **Preview** to preview the text that will be imported.

On the **Import Preview** window that opens, the text displays.



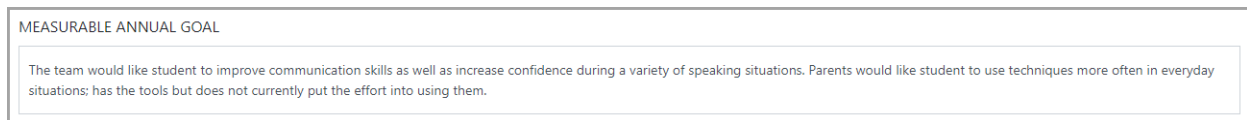
Note: Click **Ok** or **X** to close the **Import Preview** window.

7. In the Quick Document Menu, click **Copy**.



8. Click the field to which you want to import the text. Then, press CTRL + V.

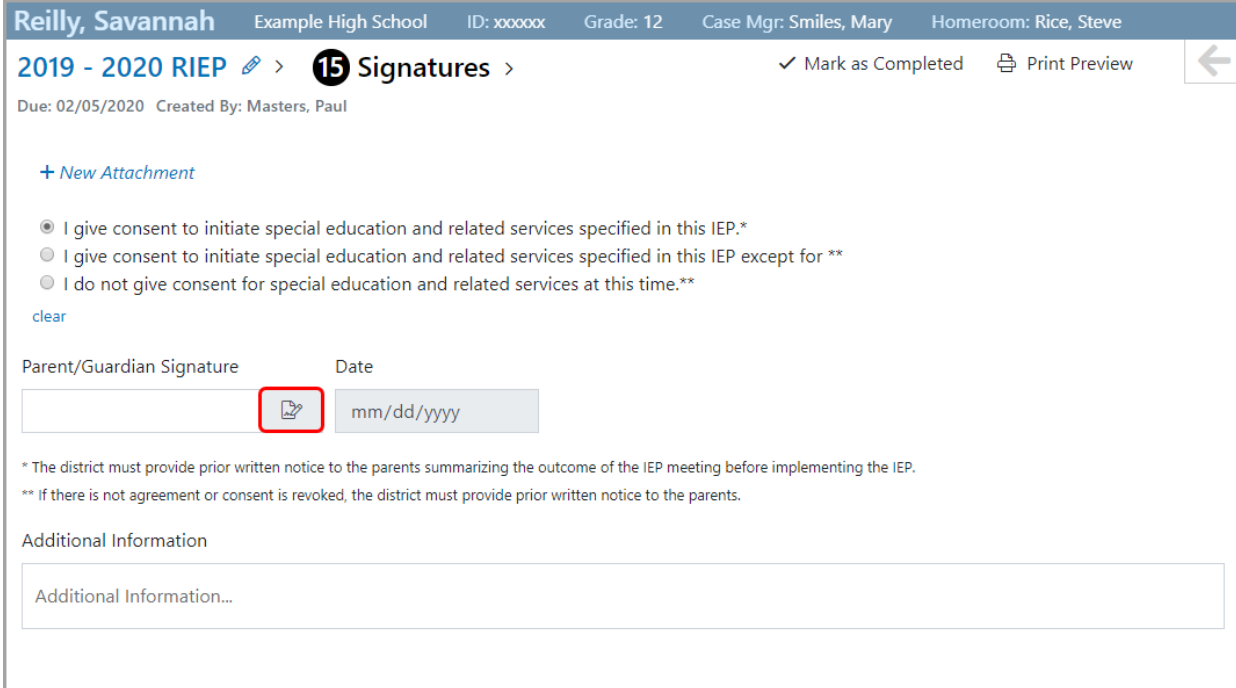
The text displays in the field.



Electronic Signatures

If your administrator has enabled electronic signatures, you can sign certain forms using your mouse, stylus, or finger.

1. On the edit version of the **Student Documents** screen, beside the field to which you want to add a signature, click .



Reilly, Savannah Example High School ID: xxxxxx Grade: 12 Case Mgr: Smiles, Mary Homeroom: Rice, Steve

2019 - 2020 RIEP > 15 Signatures > ✓ Mark as Completed Print Preview


Due: 02/05/2020 Created By: Masters, Paul

+ New Attachment

I give consent to initiate special education and related services specified in this IEP.*
 I give consent to initiate special education and related services specified in this IEP except for **
 I do not give consent for special education and related services at this time.**

clear

Parent/Guardian Signature Date



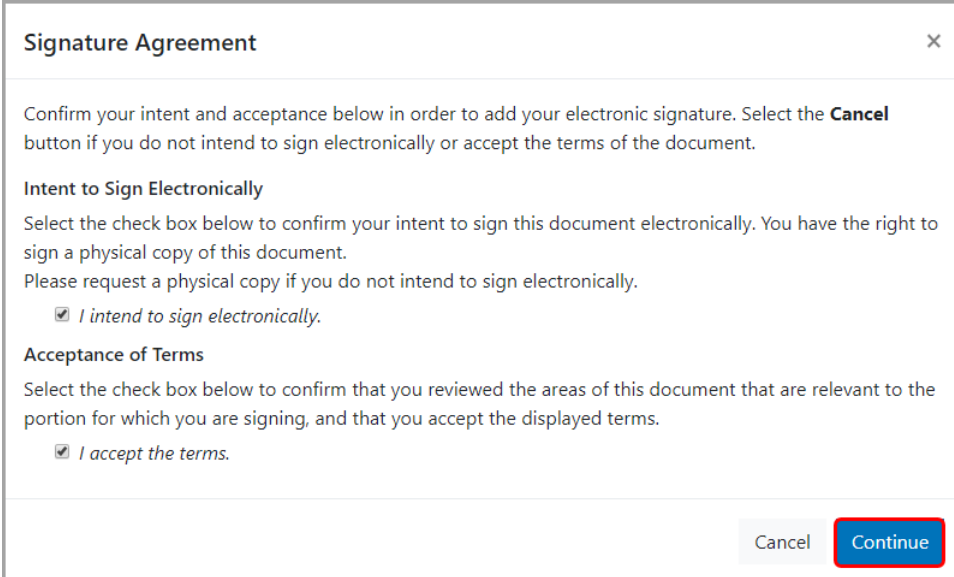
* The district must provide prior written notice to the parents summarizing the outcome of the IEP meeting before implementing the IEP.
 ** If there is not agreement or consent is revoked, the district must provide prior written notice to the parents.

Additional Information

Additional Information...

2. On the **Signature Agreement** window that opens, select the **I intend to sign electronically** and the **I accept the terms** checkbox. Then, click **Continue**.

Note: Be sure to read all of the terms and conditions before selecting the checkboxes.



Signature Agreement

Confirm your intent and acceptance below in order to add your electronic signature. Select the **Cancel** button if you do not intend to sign electronically or accept the terms of the document.

Intent to Sign Electronically

Select the check box below to confirm your intent to sign this document electronically. You have the right to sign a physical copy of this document.
Please request a physical copy if you do not intend to sign electronically.

I intend to sign electronically.

Acceptance of Terms

Select the check box below to confirm that you reviewed the areas of this document that are relevant to the portion for which you are signing, and that you accept the displayed terms.

I accept the terms.

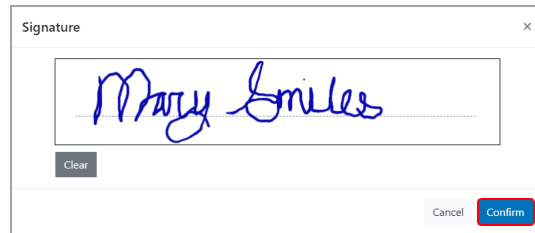
Cancel Continue

Student Documents

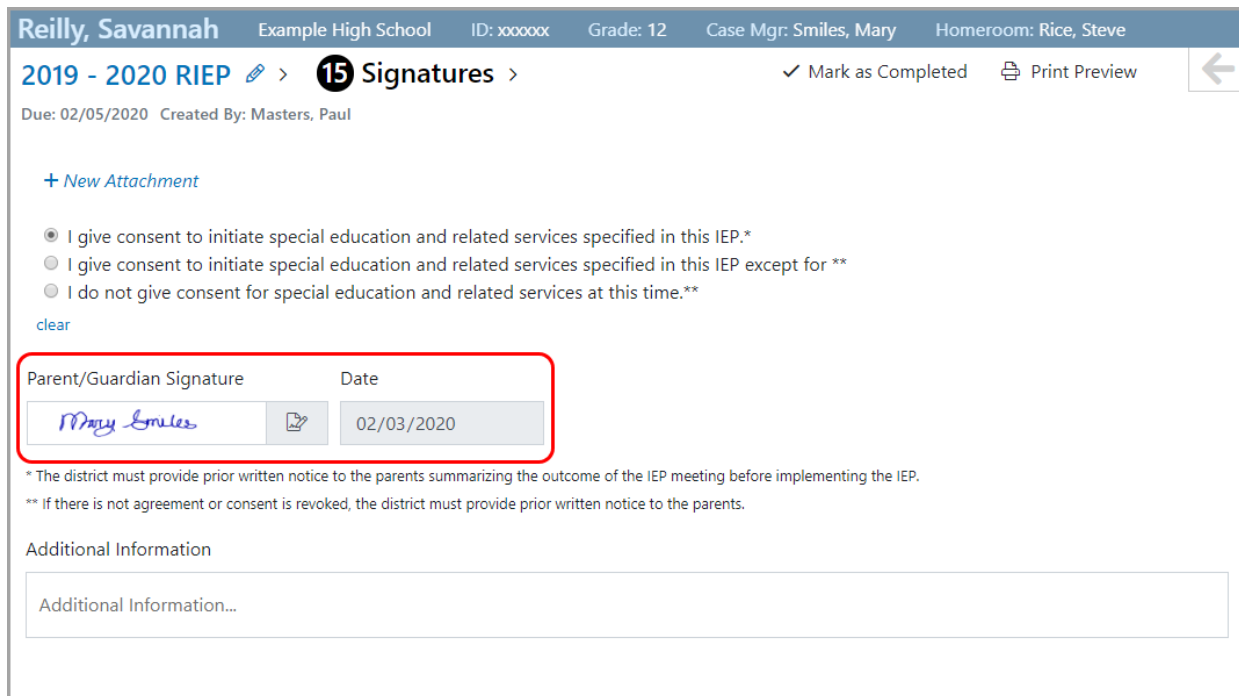
3. On the **Signature** window that opens, sign your name (or let someone else sign their name) on the dotted line.

Note: If necessary, click **Clear** to delete the signature.

4. Click **Confirm**.



On the edit version of the **Student Documents** screen, the signature displays in the applicable field.



Reilly, Savannah Example High School ID: xxxxxx Grade: 12 Case Mgr: Smiles, Mary Homeroom: Rice, Steve


2019 - 2020 RIEP > 15 Signatures > ✓ Mark as Completed Print Preview

Due: 02/05/2020 Created By: Masters, Paul

+ New Attachment

- I give consent to initiate special education and related services specified in this IEP.*
- I give consent to initiate special education and related services specified in this IEP except for **
- I do not give consent for special education and related services at this time.**

clear

Parent/Guardian Signature	Date
	02/03/2020

* The district must provide prior written notice to the parents summarizing the outcome of the IEP meeting before implementing the IEP.
** If there is not agreement or consent is revoked, the district must provide prior written notice to the parents.


Additional Information

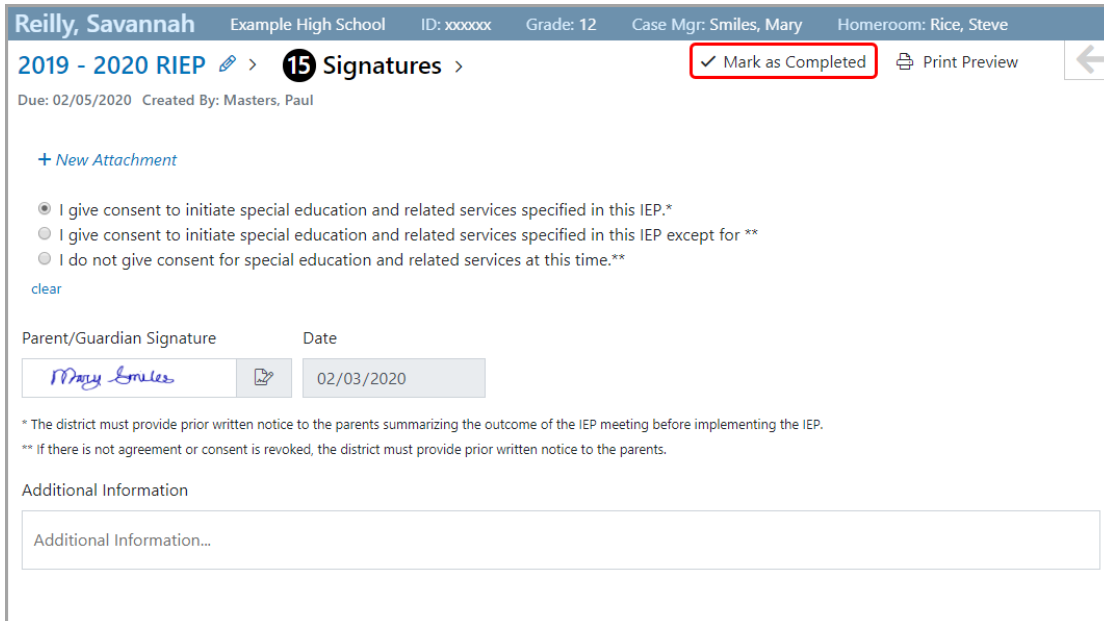
Additional Information...

Note: If a **Date** field displays beside the signature field on the form, the **Date** field automatically displays the date that the form was signed.





Completing a Form

Once you are finished editing a form in a document, you can mark that form as complete.

On the edit version of the **Student Document** screen, on the form you want to mark as complete, click  **Mark as Completed**.



Reilly, Savannah Example High School ID: xxxxxx Grade: 12 Case Mgr: Smiles, Mary Homeroom: Rice, Steve


2019 - 2020 RIEP  > **15 Signatures** >  **Mark as Completed**  Print Preview 

Due: 02/05/2020 Created By: Masters, Paul

[+ New Attachment](#)

I give consent to initiate special education and related services specified in this IEP.*
 I give consent to initiate special education and related services specified in this IEP except for **
 I do not give consent for special education and related services at this time.**

[clear](#)



Parent/Guardian Signature	Date
	02/03/2020

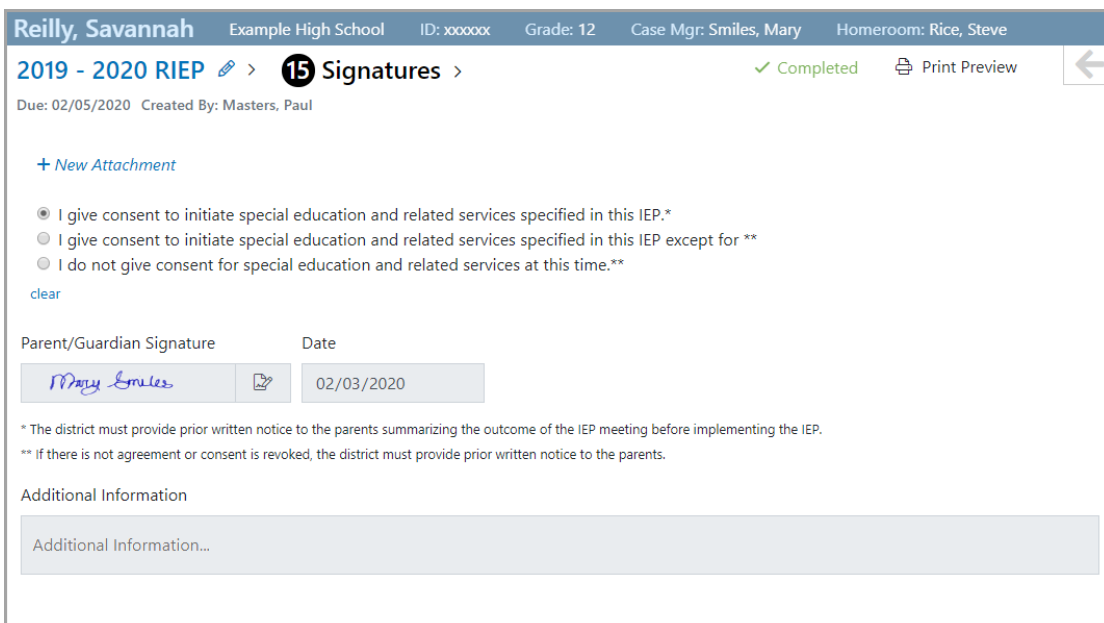
* The district must provide prior written notice to the parents summarizing the outcome of the IEP meeting before implementing the IEP.
 ** If there is not agreement or consent is revoked, the district must provide prior written notice to the parents.

Additional Information





Additional Information...

Note: You can mark a form as completed only if data has been entered on the form.

The form is now completed;  **Mark as Completed** updates to  **Completed**, and all fields are grayed out.



Reilly, Savannah Example High School ID: xxxxxx Grade: 12 Case Mgr: Smiles, Mary Homeroom: Rice, Steve


2019 - 2020 RIEP  > **15 Signatures** >  **Completed**  Print Preview 

Due: 02/05/2020 Created By: Masters, Paul

[+ New Attachment](#)

I give consent to initiate special education and related services specified in this IEP.*
 I give consent to initiate special education and related services specified in this IEP except for **
 I do not give consent for special education and related services at this time.**

[clear](#)

Parent/Guardian Signature	Date
	02/03/2020

* The district must provide prior written notice to the parents summarizing the outcome of the IEP meeting before implementing the IEP.
 ** If there is not agreement or consent is revoked, the district must provide prior written notice to the parents.

Additional Information

Additional Information...

Note: If necessary, click  **Completed** to reopen the form.

Banks

You can set up and maintain your own bank of items (such as phrases, lists, tables, graphics, etc.) that you plan to reuse on forms. You can also use bank items that are set up and maintained by your district.

- [“Creating User Bank Items”](#)
- [“Inserting User and District Bank Items”](#)

Creating User Bank Items

Note: Only administrators can add, edit, and/or delete district bank items. For more information, see the ProgressBook SpecialServices Administrator Guide.

1. On the edit version of the **Student Documents** screen, click the field for which you want to create a user bank item. Then, click **Create**.

Note: Banks are unavailable for some fields.

The screenshot shows the ProgressBook interface for a student named Acosta, Brooke, in Example High School, Grade 12. The page is titled '2019-2020 Initial IEP' and '6 Measurable Annual Goals'. The 'Goal' section is active, showing a 'NUMBER' field with the value '1' and an 'AREA' field. Below the goal fields is a rich-text editor with a toolbar containing options for bold, italic, underline, strikethrough, bulleted list, numbered list, indent, and paragraph. The 'Create' button is highlighted with a red box, and a mouse cursor is pointing at it.

2. In the **My Banks** area that opens, enter a **Bank Name** in the field.
3. In the rich-text field, enter the desired content for the bank item.

Note: You can use the [“Bank Codes”](#) in the table on the following page as shortcuts that automatically add the correct value to a field depending on the name and gender of the student.

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 .

4. Click **Create**.

The **My Banks** area closes, and the new user bank item displays below the current field on the **Personal** tab.

Note: For information on inserting user and district bank items on a form, see [“Inserting User and District Bank Items.”](#)

Inserting User and District Bank Items

1. On the edit version of the **Student Documents** screen, click the field in which you want to insert a user or district bank item.

Below the field, beside **Copy From**, displays if user bank items are available, and displays if district bank items are available.

Note: If no bank items are available, you can create a new user bank item for this field (see “[Creating User Bank Items](#)”).

2. Click **Copy From**.

The screenshot shows the top navigation bar with user information: Acosta, Brooke, Example High School, ID: xxxxxx, Grade: 12, Case Mgr: Masters, Paul, Homeroom: Rice, Steve. Below this is the document title '2019-2020 Initial IEP' and a sub-section '6 Measurable Annual Goals'. A 'Copy From' button is highlighted with a red box, and a mouse cursor is pointing at it. The button has a radio button next to it that is currently selected (filled).

All available user bank items display below the current field on the **Personal** tab.

Note: To view district bank items, click the **District** tab.

3. Locate the desired bank item. Then, click **Insert**.

The screenshot shows a 'Present Level' dialog box with a rich text editor. Below the editor are two tabs: 'Personal' and 'District'. Under the 'Personal' tab, there is a section titled 'Achievement & Performance' with the text 'Example text'. To the right of this text are three buttons: 'Insert', 'Copy', and 'Edit'. The 'Insert' button is highlighted with a red box.

Note: To copy the bank item to your clipboard, click **Copy**. To edit or delete the bank item, click **Edit**. (**Edit** displays only if the bank item is a user bank item.)

The bank item displays in the current field. Click **X** to return to the form.

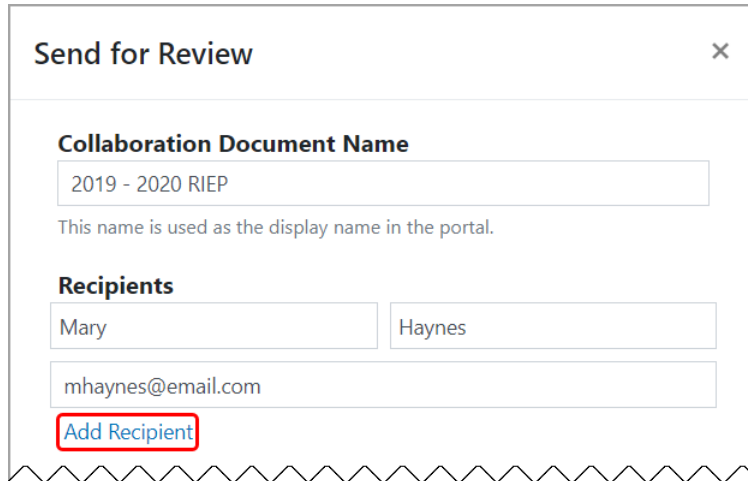
Sending a Document for Review via the Frontline Collaboration Portal

Before a document is completed, you can send it to the desired recipients for review via the Frontline Collaboration Portal. Recipients can then sign and/or annotate the document as necessary.

1. On the document overview version of the **Student Documents** screen, click **Complete**.

2. On the **Send for Review** window that opens, click **Continue to Review**.

3. In the **Collaboration Document Name** field, enter a name for the document. (The name of the document in SpecialServices displays by default.) This name is used as the display name in the Frontline Collaboration Portal.
4. In the **Recipients** area, enter the **First Name**, **Last Name**, and **Email Address** of the desired recipient in the appropriate fields.
5. Click **Add Recipient**.



The email address of the newly added recipient displays below the fields.

Note: To remove the recipient, click .



6. (Optional) Repeat [step 4](#) and [step 5](#) as necessary.
7. In the **Create Unique Access Code** field, enter an access code with at least 4 characters.
8. (Optional) If you want to include a message in the notification email that will be sent to the recipient(s), in the **Message (Optional)** field, enter a message.
9. Select the **I have reviewed the Acknowledgment and agree to the terms above** checkbox.

10. Click **Send**.

Create Unique Access Code

1234

Message (Optional)

Enter your message here.

ACKNOWLEDGEMENT

By creating and sharing this document with student personally identifiable information, I attest: (i) to the accuracy and integrity of the document(s); (ii) that the recipient email address and access code are correct for this student; and (iii) that the recipient is, by District records, authorized to view and sign the document(s).

I have reviewed the Acknowledgment and agree to the terms above.

Send Cancel

The document is sent to the Frontline Collaboration Portal, and the document **Status** changes from **Open** to **In Review** in SpecialServices.


Note: You can reopen a document that has been sent to the portal if necessary. On the document overview version of the **Student Documents** screen, click **In Review**. On the **Re-open Document in Review** window that opens, click **Continue**.

Re-open Document In Review ×

This document is in review in the Collaboration Portal. Re-opening the document will remove it from the portal and all signatures will be lost.

Cancel **Continue**

The document is reopened, and its **Status** changes from **In Review** to **Open**.

Note: If you have the appropriate security privileges, you can access the Frontline Collaboration Portal directly from SpecialServices. On any screen, click  to expand the left navigation menu. Then, click **Collaboration Portal**. The portal opens in a new window or tab.

Note: For more information on the Frontline Collaboration Portal, see the [Collaboration Portal User Guide](#).

Include in EMIS

Note: For information on creating an EMIS extract on the Student Information SpecialServices EMIS Extract screen, see the ProgressBook SpecialServices Administrator Guide.

Per ODE's requirements, all IEPs, ETRs, SPs, 504Ps, and MDs with a **Status** of **Open**, **In Review**, or **Completed** are marked with **Include in EMIS** and included in the EMIS extract by default. If desired, you can exclude an IEP, ETR, SP, 504P, or MD from the EMIS extract when you create it (see [step 11](#) of "[Creating a New Document](#)"). You can also manually include or exclude a document using the **Include in EMIS** and **Exclude from EMIS** buttons, respectively, on the **Student Documents** screen **Documents** tab.

- ["Manually Including Documents in the EMIS Extract"](#)
- ["Manually Excluding Documents from the EMIS Extract"](#)

Manually Including Documents in the EMIS Extract

1. On the **Student Documents** screen **Documents** tab, select the checkbox(es) for the document(s) you want to include in the EMIS extract. Or, select the checkbox in the column header to select all documents.
2. Click **Include in EMIS**.

Documents											
Recycle Bin											
+ New Document ! Mark as Priority ★ Include in EMIS 🗑 Delete 🔍 ⚙											
<input type="checkbox"/>	! Student	DOB	Grade	Case Manager	Document	Type	Include in EMIS	Status	Event Date	Due Date	Progress
<input type="checkbox"/>	Barnes, Amanda	12/21/2004	10	Smiles, Mary	2020-2021 Initial IEP	IEP		Open		08/01/2020	6%
<input type="checkbox"/>	Carson, Serena	05/05/2004	11	Smiles, Mary	2020-2021 Initial IEP	IEP		Open		07/28/2020	
<input type="checkbox"/>	Corbin, John	08/29/2003	11	Masters, Paul	2020-2021 Initial IEP	IEP		Open		07/24/2020	
<input type="checkbox"/>	Miller, Casey	02/06/2008	07	Masters, Paul	2020-2021 Initial IEP	IEP	★	Completed			
<input type="checkbox"/>	Nelson, Amber	03/03/2011	04	Brown, Kendra	2020-2021 Initial IEP	IEP	★	Completed	04/16/2020		
<input checked="" type="checkbox"/>	Stevenson, Aaron	07/05/2015	PS	Smiles, Mary	2019-2020 Initial ETR	ETR		Completed			

Note: When you click **Include in EMIS** for a document that should not be reported to ODE, the **This document type is not included in EMIS by default** error message displays, and in the **Include in EMIS** column for the selected document(s), **!** displays until you refresh the screen.

All selected documents with a **Status** of **Completed** are now included in the EMIS extract, and in the **Include in EMIS** column, **★** displays for the applicable documents. All selected documents with a **Status** of **Open** or **In Review** will automatically be included in the EMIS extract once they are completed, and in the **Include in EMIS** column, **☆** displays for the applicable documents.

Manually Excluding Documents from the EMIS Extract

1. On the **Student Documents** screen **Documents** tab, select the checkbox(es) for the document(s) you want to exclude from the EMIS extract. Or, select the the checkbox in the column header to select all documents.
2. Click **Exclude from EMIS**.

Note: *Exclude from EMIS displays only if all selected documents were previously marked with **Include in EMIS**.*

Documents		Recycle Bin											
+ New Document		! Mark as Priority		★ Exclude from EMIS		🗑 Delete						🔍 ⚙	
<input type="checkbox"/>	!	Student	DOB	Grade	Case Manager	Document	Type	Include in EMIS	Status	Event Date	Due Date	Progress	
<input type="checkbox"/>	!	Barnes, Amanda	12/21/2004	10	Smiles, Mary	2020-2021 Initial IEP	IEP		Open		08/01/2020	<div style="width: 6%;"><div>6%</div></div>	
<input type="checkbox"/>		Carson, Serena	05/05/2004	11	Smiles, Mary	2020-2021 Initial IEP	IEP		Open		07/28/2020		
<input type="checkbox"/>	!	Corbin, John	08/29/2003	11	Masters, Paul	2020-2021 Initial IEP	IEP		Open		07/24/2020		
<input type="checkbox"/>		Miller, Casey	02/06/2008	07	Masters, Paul	2020-2021 Initial IEP	IEP	★	Completed				
<input type="checkbox"/>		Nelson, Amber	03/03/2011	04	Brown, Kendra	2020-2021 Initial IEP	IEP	★	Completed	04/16/2020			
<input checked="" type="checkbox"/>		Stevenson, Aaron	07/05/2015	PS	Smiles, Mary	2019-2020 Initial ETR	ETR	★	Completed				

The selected documents are now excluded from the EMIS extract, and in the **Include in EMIS** column, ☆ or ★ (depending on whether each selected document has a **Status** of **Open**, **In Review**, or **Completed**) no longer displays.

Completing a Document



Caution: *Once a document is marked as completed, it cannot be reopened. Make sure that this is what you intend before taking this action.*

Once all of the forms in a document are marked as completed, if you have the appropriate security privileges, you can complete the document. Once a document is completed, a read-only PDF is generated for it. It is important to complete a document when all of its forms are complete for the following reasons:

- Users with read-only security privileges can view the forms in the document.
- You or other users can start the next cycle of forms for the document. (You cannot create a new document if a document of the same type is currently open for a particular student.)
- You or other users can generate the EMIS data that will be reported to ODE. (The system extracts EMIS data only from completed documents.)

1. On the document overview version of the **Student Documents** screen, click **✓ Complete**.

Reilly, Savannah Example High School ID: xxxxxx Grade: 12 Case Mgr: Smiles, Mary Homeroom: Rice, Steve

2019 - 2020 RIEP > ! Mark as Priority Print Preview + Add Additional Forms **✓ Complete** Delete

Due: 02/05/2020 Created By: Masters, Paul

Individualized Education Plan Overview 100%

Cover Page	✓ Completed
1. Future Planning	✓ Completed
2. Special Instructional Factors	✓ Completed
3. Profile	✓ Completed
4. Extended Services	✓ Completed
6. Measurable Annual Goals 1 Goal	✓ Completed
7. Specially Designed Services	✓ Completed
8. Transportation	✓ Completed
9. Nonacademic Services	✓ Completed
10. General Factors	✓ Completed
11. Least Restrictive Environment	✓ Completed

2. On the **Send for Review** window that opens, click **Complete**.

Send for Review [X]

Sending this document for review lets recipients sign and annotate it via the Frontline Collaboration Portal.

Note: This document cannot be edited or deleted while it is being reviewed.

✓ Complete Continue to Review >

Note: If you want to send the document for review via the Frontline Collaboration Portal before completing it, see [“Sending a Document for Review via the Frontline Collaboration Portal.”](#)

The document is completed and a read-only PDF is generated for it.

Printing a Document

1. On the document overview or edit versions of the **Student Documents** screen, click **Print Preview**.

Reilly, Savannah Example High School ID: xxxxxx Grade: 12 Case Mgr: Smiles, Mary Homeroom: Rice, Steve

2019 - 2020 RIEP > ! Mark as Priority **Print Preview** + Add Additional Forms ✓ Complete 🗑 Delete

Due: 02/05/2020 Created By: Masters, Paul

Individualized Education Plan Overview 100%

Cover Page	✓ Completed
1. Future Planning	✓ Completed
2. Special Instructional Factors	✓ Completed
3. Profile	✓ Completed
4. Extended Services	✓ Completed
6. Measurable Annual Goals	1 Goal ✓ Completed
7. Specially Designed Services	✓ Completed
8. Transportation	✓ Completed
9. Nonacademic Services	✓ Completed
10. General Factors	✓ Completed
11. Least Restrictive Environment	✓ Completed

The print preview version of the screen displays.

2. (Optional) If you want to include a draft watermark on all pages of the printed document, click **Show Draft Watermark**.

3. Click **Print**. Then, follow the printing procedure for the browser you are using.

Show Draft Watermark **Print** ← Exit Preview

IEP

Individualized Education Program

Example School District

THIS IEP WILL BE IMPLEMENTED DURING THE REGULAR SCHOOL TERM UNLESS NOTED IN SECTION 4 EXTENDED SCHOOL YEAR SERVICES

CHILD'S INFORMATION

NAME: Savannah Reilly ID NUMBER: xxxxxxxx
 STREET: 1841 Lincoln Ave GENDER: F GRADE: 12 / 12
 CITY: City STATE: OH ZIP: xxxxxx
 DATE OF BIRTH: 11/01/2010

DISTRICT OF RESIDENCE: Example SD COUNTY OF RESIDENCE: Example County DISTRICT OF SERVICE: xxxxxxxx DOS

Is the child in preschool? Yes No
 Will the child be 14 years old before the end of this IEP? Yes No
 Is the child younger than 14 years of age but has transition and postsecondary goal information? Yes No
 Is the child a ward of the state? Yes No
 IEP by third birthday? (If transitioning from Part C services) Yes No

PARENT/GUARDIAN INFORMATION

NAME: Katherine Reilly
 STREET: 1841 Lincoln Ave
 CITY: City STATE: OH ZIP: xxxxxx
 HOME PHONE: (xxx) xxx-xxxx WORK PHONE: _____
 CELL PHONE: _____ EMAIL: KatherineReilly@email.com

OTHER INFORMATION:

The following document was given to the parent at the IEP meeting; Scholarship Information letter

MEETING INFORMATION

MEETING DATE: 05/08/2015
 MEETING TYPE:
 INITIAL IEP
 ANNUAL REVIEW
 REVIEW OTHER THAN ANNUAL REVIEW
 AMENDMENT
 OTHER

IEP TIME LINES

ETR COMPLETION DATE: 05/08/2015
 NEXT ETR DUE DATE: 05/07/2018
 IEP EFFECTIVE DATES
 START: 05/08/2015
 END: 05/07/2016
 NEXT IEP REVIEW: 05/07/2016

IEP FORM STATUS
 (Check when complete)

1. FUTURE PLANNING
 2. SPECIAL INSTRUCTIONAL FACTORS
 3. PROFILE
 4. EXTENDED SCHOOL YEAR SERVICES
 5. POSTSECONDARY TRANSITION SERVICES
 6. MEASURABLE ANNUAL GOALS
 7. SPECIALLY DESIGNED SERVICES
 8. TRANSPORTATION AS A RELATED SERVICE
 9. NONACADEMIC AND EXTRA CURRICULAR
 10. GENERAL FACTORS
 11. LEAST RESTRICTIVE ENVIRONMENT
 12. STATEWIDE AND DISTRICT TESTING
 13. EXEMPTIONS

Note: To return to the previous screen, click **Exit Preview**.

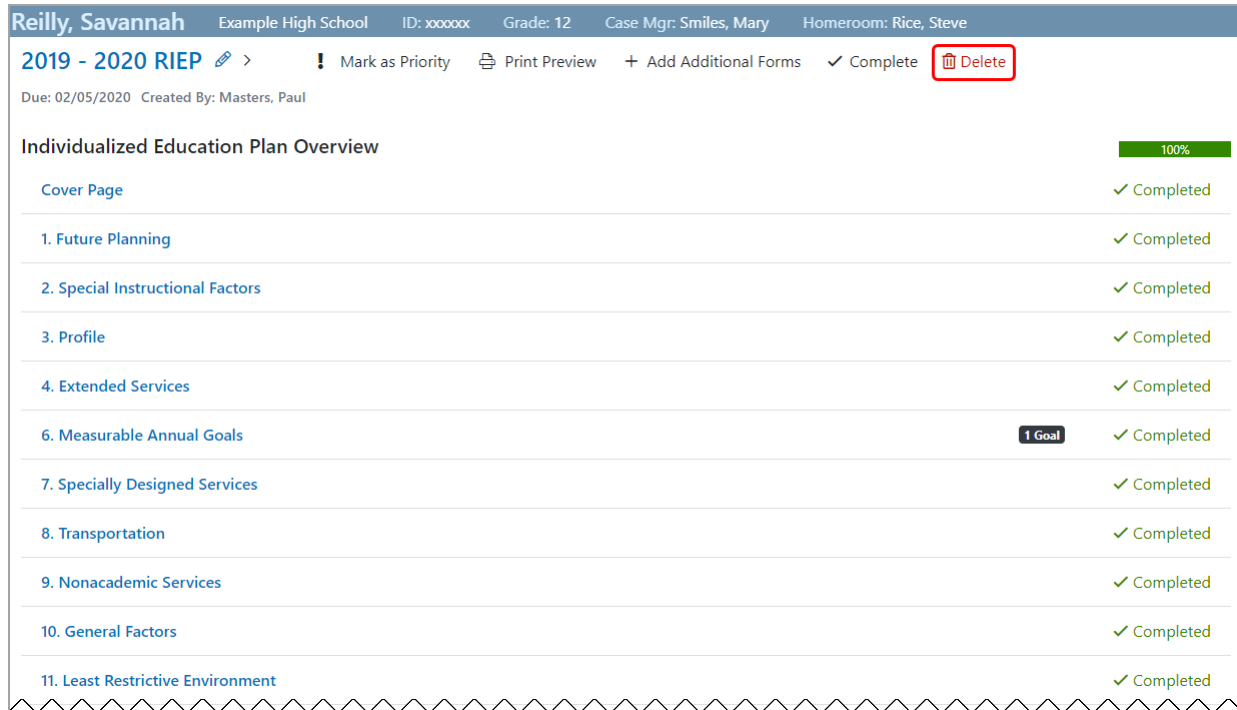
Deleting a Document

You can delete an individual document on the document overview version of the **Student Documents** screen, or you can delete multiple documents at once on the **Student Documents** screen **Documents** tab. Once a document is deleted, it displays on the **Student Documents** screen **Recycle Bin** tab where you can restore the deleted document if necessary.






- [“Deleting a Document on the Document Overview”](#)
- [“Deleting a Document on the Student Documents Screen”](#)
- [“Recycle Bin Tab”](#)

Deleting a Document on the Document Overview

On the document overview version of the **Student Documents** screen, click  **Delete**.



Reilly, Savannah Example High School ID: xxxxxx Grade: 12 Case Mgr: Smiles, Mary Homeroom: Rice, Steve

2019 - 2020 RIEP  >  Mark as Priority  Print Preview + Add Additional Forms  Complete  **Delete**

Due: 02/05/2020 Created By: Masters, Paul


Individualized Education Plan Overview 100%

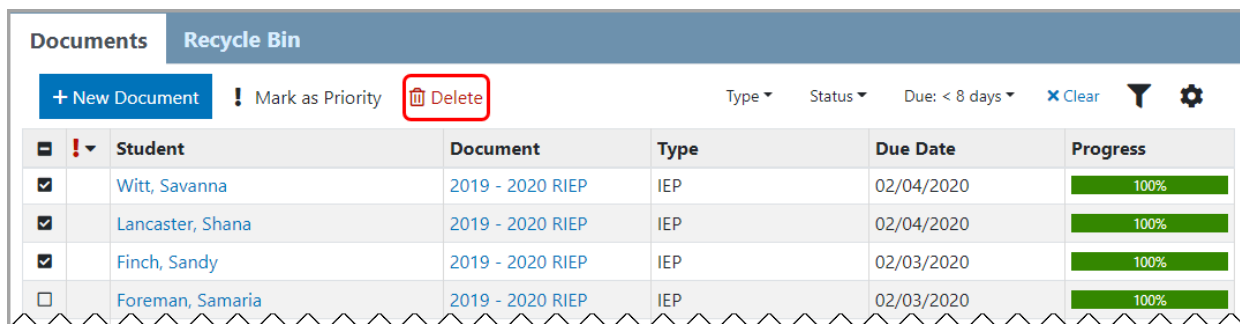
Cover Page	✓ Completed
1. Future Planning	✓ Completed
2. Special Instructional Factors	✓ Completed
3. Profile	✓ Completed
4. Extended Services	✓ Completed
6. Measurable Annual Goals 1 Goal	✓ Completed
7. Specially Designed Services	✓ Completed
8. Transportation	✓ Completed
9. Nonacademic Services	✓ Completed
10. General Factors	✓ Completed
11. Least Restrictive Environment	✓ Completed

The document is deleted and displays on the **Student Documents** screen **Recycle Bin** tab (see [“Recycle Bin Tab”](#)).







Note: If you need to restore the document, before you navigate away from the document overview of the **Student Documents** screen, click  **Restore**.

Deleting a Document on the Student Documents Screen

1. On the **Student Documents** screen **Documents** tab, in the row(s) of the document(s) you want to delete, select the checkbox(es). Then, click  **Delete**.

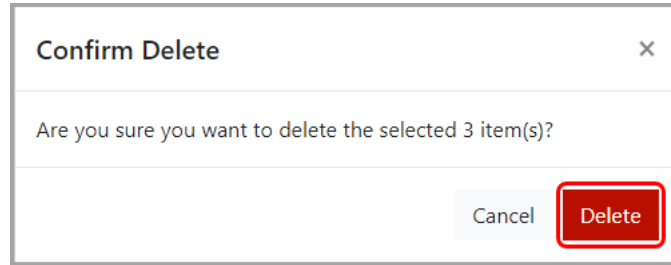


Documents **Recycle Bin**

 New Document  Mark as Priority  **Delete** Type Status Due: < 8 days  Clear  

<input type="checkbox"/>	Student	Document	Type	Due Date	Progress
<input checked="" type="checkbox"/>	Witt, Savanna	2019 - 2020 RIEP	IEP	02/04/2020	100%
<input checked="" type="checkbox"/>	Lancaster, Shana	2019 - 2020 RIEP	IEP	02/04/2020	100%
<input checked="" type="checkbox"/>	Finch, Sandy	2019 - 2020 RIEP	IEP	02/03/2020	100%
<input type="checkbox"/>	Foreman, Samaria	2019 - 2020 RIEP	IEP	02/03/2020	100%


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








The document is deleted and displays on the **Student Documents** screen **Recycle Bin** tab (see “[Recycle Bin Tab](#)”).

Recycle Bin Tab

The **Student Documents** screen **Recycle Bin** tab displays all of the deleted documents to which you have access and lets you restore those documents if necessary.

To restore a document, click .

Documents	Banks	Recycle Bin				
	Student	Grade	Case Manager	Document	Type	Deleted
	Henderson, Slate	4	Masters, Paul	2018 - 2019 RIEP	IEP	02/03/2020 by Masters, Paul
	Simpson, Skye	4	Smiles, Mary	2018 - 2019 RIEP	IEP	02/03/2020 by Masters, Paul
	Wagner, Shea	4	Smiles, Mary	2018 - 2019 RIEP	IEP	02/03/2020 by Masters, Paul
	Case, Liv	10	Masters, Paul	2019-2020 Initial IEP	IEP	02/03/2020 by Masters, Paul
	Battle, Steven	10	Masters, Paul	2019 - 2020 IIEP	IEP	02/03/2020 by Masters, Paul

Note: To sort by a column, click the column heading.

Once restored, the document no longer displays in the grid and instead displays on the **Student Documents** screen **Documents** tab.

Renaming a Document

If you have the appropriate security privileges to edit open documents, you have the ability to rename a document, if needed.

Navigation: SpecialServices > Student Documents > Documents tab

1. On the **Student Documents** screen **Documents** tab, in the row of the document you want to rename, click .

- In the drop-down list that displays, select **Rename**.

SpecialServices » Student Documents

Documents Banks Recycle Bin

+ New Document ! Mark as Priority ★ Include in EMIS 🗑 Delete

Student	Grade	Document	Type	Include in EMIS	Due Date	Progress
Palmer, Simone	3	2019 - 2020 RIEP	IEP			
Payne, Soraya	3	2019 - 2020 RIEP	IEP			
Bradley, Sirisha	3	2019 - 2020 RIEP	IEP			
Austin, Siri	3	2019 - 2020 RIEP	IEP			
Montgomery, Shane	3	2019 - 2020 RIEP	IEP			

The Rename Document window opens.

Rename Document

Document Name 2019 - 2020 RIEP

Cancel Save

- The **Document Name** field displays the current name of the document, but you can modify this as necessary.
- Click **Save** to save your changes.

A message informs you that the document rename was successful, and the updated name displays in the **Document** column.

SpecialServices » Student Documents

Documents Banks Recycle Bin

+ New Document ! Mark as Priority ★ Include in EMIS 🗑 Delete

Document rename Successful

Student	Grade	Document	Type	Include in EMIS	Due Date	Progress
Palmer, Simone	3	Renamed Document	IEP			
Payne, Soraya	3	2019 - 2020 RIEP	IEP			

My Students

Navigation: SpecialServices > My Students

The **My Students** screen displays student data for all the students to whom you have access. If you are a case manager or service provider, you can assign students to a related service on this screen. If you are a teacher, the information on this screen is read-only.

Note: For more information on administrative access to the **My Students** screen, see the ProgressBook SpecialServices Administrator Guide.

Teacher (General Education) View

My Students							
Student	Id	Code	Related Services	Documents	Status	Due Date	Progress
Allen, Orby	6712002	DD	Masters, Paul Case Manager Smiles, Mary Assistive technology	2018-2019 Initial IEP	Open	08/23/2019	
Anderson, Journey	6711001	TBI	Masters, Paul Case Manager Johnson, John Occupational therapy	2018-2019 Reevaluation ETR	Open	08/23/2019	
Palmer, Simone	6701011	MD	Masters, Paul Case Manager	2018-2019 Review IEP	Open	08/23/2019	<div style="width: 40%;"><div style="background-color: #0070C0; color: white; padding: 2px;">40%</div></div>
				2018-2019 Transition & Goals/Obj	Open	08/23/2019	
Small, Shannelle	6701038	ASD	Masters, Paul Case Manager	2016-2017 RIEP	Completed	02/08/2017	
				2017-2018 RIEP	Completed	02/09/2018	
				2018-2019 RIEP	Open	08/06/2019	
Smiles, Sebastian	6701001	VI	Masters, Paul Case Manager Johnson, John Occupational therapy Smiles, Mary Assistive technology	2018-2019 Transition & Goals/Obj	Open	08/17/2019	
				2018-2019 Review IEP	Open	08/16/2019	

- **Student** – Displays the student’s name as a link you can click to view the **Student Profile** screen (see “[Student Profile](#)”).
- **Id** – Displays the student’s identification number.
- **Code** – Displays the student’s disability code(s) (if applicable).
- **Related Services** – Displays the student’s related special education services and the names of the staff members who provide those services.

Note: Click a staff member’s name to open your default email application and create a new message with the staff member as the recipient.

- **Documents** – Displays each of the student’s documents as a link you can click to view the overview version of the **Student Documents** screen (for open documents) or a PDF version of the document (for completed documents) (see “[Student Documents](#)”).

Note: You can view only the documents to which you have access.

Case Manager/Service Provider View

My Students		Assign Students						
Student	Id	Code	Related Services	Documents	Status	Due Date	Progress	
Allen, Orby	6712002	DD	<ul style="list-style-type: none"> ✘ Masters, Paul Case Manager ✘ Smiles, Mary Assistive technology 	2018-2019 Initial IEP	Open	08/23/2019		
Anderson, Journey	6711001	TBI	<ul style="list-style-type: none"> ✘ Masters, Paul Case Manager ✘ Johnson, John Occupational therapy 	2018-2019 Reevaluation ETR	Open	08/23/2019		
Palmer, Simone	6701011	MD	<ul style="list-style-type: none"> ✘ Masters, Paul Case Manager 	2018-2019 Review IEP	Open	08/23/2019	40%	
Small, Shannelle	6701038	ASD	<ul style="list-style-type: none"> ✘ Masters, Paul Case Manager 	2018-2019 Transition & Goals/Obj	Open	08/23/2019		
				2016-2017 RIEP	Completed	02/08/2017		
				2017-2018 RIEP	Completed	02/09/2018		
Smiles, Sebastian	6701001	VI	<ul style="list-style-type: none"> ✘ Masters, Paul Case Manager ✘ Johnson, John Occupational therapy ✘ Smiles, Mary Assistive technology 	2018-2019 RIEP	Open	08/06/2019		
				2018-2019 Transition & Goals/Obj	Open	08/17/2019		
				2018-2019 Review IEP	Open	08/16/2019		

- **Assign Students** (case manager/service provider view only) – Click to assign one or more students to a related service (see [“Assigning Students to a Related Service”](#)).
- **✘** (case manager/service provider view only) – Click to unassign the student from the related service.

Assigning Students to a Related Service

If you are a case manager, you can assign students to a related service and select the staff member who will provide the service. If you are a service provider, you can assign students only to yourself.

1. On the **My Students** screen, click **Assign Students**.
2. On the **Assign Students** window that opens, complete one of the following:
 - If you are a case manager, in the **Choose a Provider** field, enter 2 or more letters of a staff member’s first or last name. Then, select the appropriate staff member from the results list that displays. (You can select yourself if desired.)

Assign Students
✘

Choose a Provider

Smiles, Mary

✘

Choose a Service

Case Manager self assign only

Assistive Technology

Parent counseling and training

Physical therapy

Note: To remove the staff member, click **✘**.

- If you are a service provider, make sure that your name displays in the **Choose a Provider** field.

3. In the **Choose a Service** area, click the name of the service that the staff member will provide to the student(s).

The name of the service you selected is highlighted in green, and a checkmark displays beside it.

4. Click **Students**.

The screenshot shows a window titled "Assign Students" with a close button (X) in the top right corner. Below the title bar, there is a section labeled "Choose a Provider" with a dropdown menu showing "Masters, Paul" and a clear button (X). Below this is a section labeled "Choose a Service" with a list of services. The service "Occupational therapy" is selected and highlighted in green, with a checkmark (✓) to its left. The other services listed are: Case Manager, Speech-language and audiology services, Interpreting services, Psychological services, Physical therapy, Assistive technology, Recreation, including therapeutic recreation, Counseling services, Orientation and mobility, Medical services, School health and/or school nurse services, Social work services, Parent counseling and training, and Other. At the bottom right of the window, there are two buttons: "Students >" (highlighted with a red box) and "Cancel".

5. On the student search version of the **Assign Students** window, search for a student by entering a student ID number or at least 3 letters of the student's first or last name.

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

6. When the results list displays, click **+** beside the name of the student whom you want to assign.

The student's name displays in the **Student to Assign** list.

Note: To remove the student, click **X**.

7. Repeat [step 5](#) and [step 6](#) as necessary.

8. Click **Assign**.

Assign Students
✕

Masters, Paul
Occupational therapy

mo ✕

6 results

+	Morgan, Ashley Middle School	xxxxxx Grade: 06
+	Monroe, Kelsi Elementary School	xxxxxx Grade: 06

	Student to Assign	ID
✕	Morgan, Ashley	xxxxxx
✕	Monroe, Kelsi	xxxxxx

Assign
Cancel

The staff member and related service display in the grid for the appropriate student(s).

Reports

In SpecialServices, you can access and run StudentInformation Analytics Hub reports.

- [“Accessing Reports”](#)
- [“Running Reports”](#)

Accessing Reports

You can access your 3 most recently run reports from the banner or the **Dashboard** screen. You can also access the StudentInformation Analytics Hub to view all available reports.

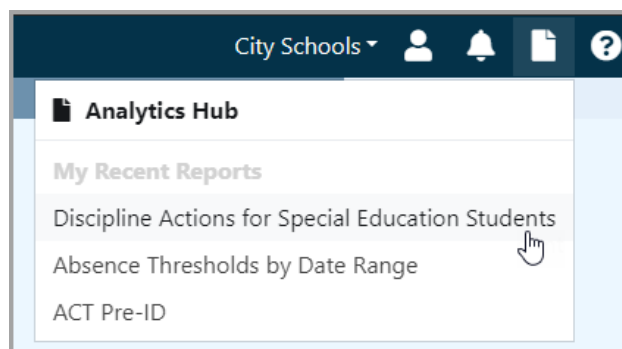
- [“Accessing Reports from the Banner”](#)
- [“Accessing Reports from the Dashboard”](#)

Accessing Reports from the Banner

1. On the banner, click .

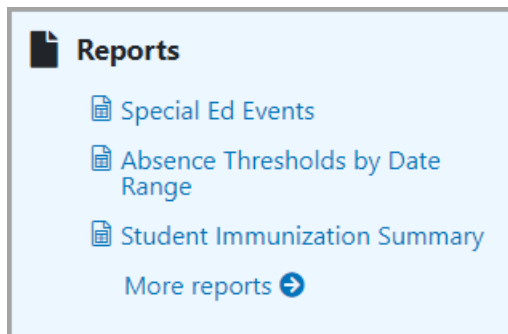
A drop-down list displays with your 3 most recently run reports.

2. To view a report, click the report name. Or, to open the StudentInformation Analytics Hub, click **Analytics Hub**.



Accessing Reports from the Dashboard

On the **Dashboard** screen, in the **Reports** area, click the name of a report to view it. Or, click **More reports** to open the StudentInformation Analytics Hub.

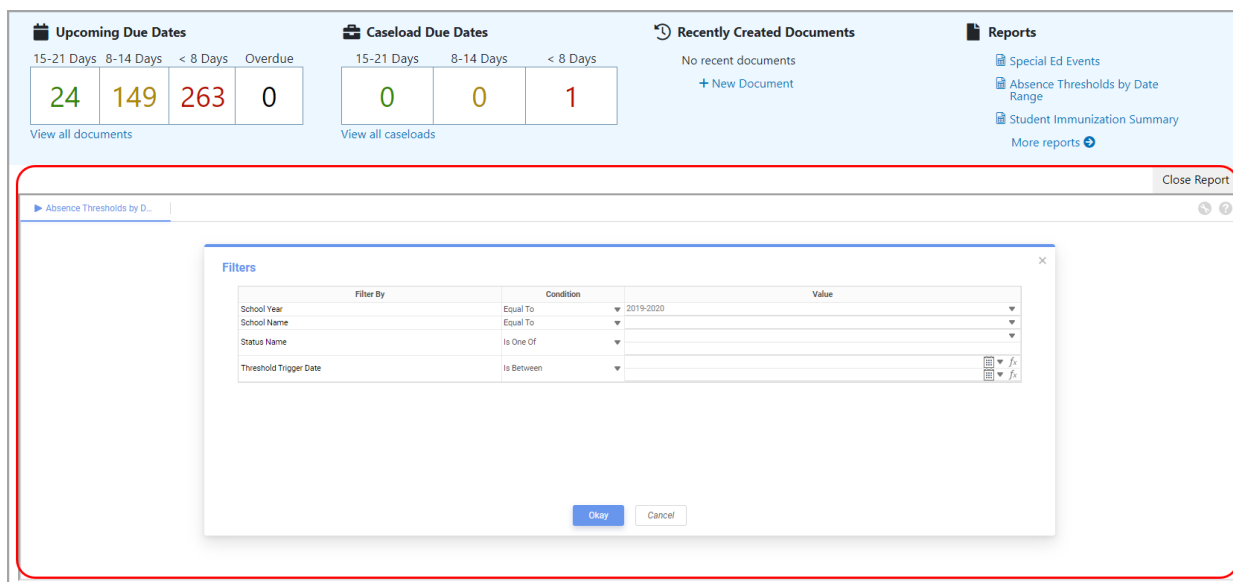


Running Reports

Note: For more detailed instructions on running reports and using the StudentInformation Analytics Hub, see the ProgressBook Reporting Analytics Hub Guide.

1. On the banner or on the **Dashboard** screen, click the name of the report you want to run (see [“Accessing Reports”](#)).

The **Filters** area displays on the bottom half of the screen.



2. (Optional) Select different **Conditions** for each filter to ensure that the data you need is returned. In most cases, it is not necessary to modify the preselected conditions.

Reports

3. Select the value(s) for each filter. Values are available only if there is data to return. If you do not see any values, try changing a prior value.

Note: Each value you select for a filter affects the value(s) available for the next filter; therefore, it is recommended that you select the value(s) in top-down sequential order. If you leave a value blank, the report assumes that all available values were selected.

Note: Selecting too many filters may return no results.

4. Click **Okay**.

Filter By	Condition	Value
School Year	Equal To	2019-2020
School Name	Equal To	High School
Status Name	Is One Of	ACTIVE RES
Threshold Trigger Date	Is Between	

The report displays.

Threshold Type	Trigger Date	Grade
High School		
#: 590536		
Grade: 10		
ConsecutiveHabitualTruancy	09/03/2019 12:00 AM	
MonthlyExcessiveAbsences	09/10/2019 12:00 AM	
YearlyExcessiveAbsences	09/10/2019 12:00 AM	
MonthlyHabitualTruancy	09/11/2019 12:00 AM	
YearlyHabitualTruancy	09/11/2019 12:00 AM	
#: 790746		
Grade: 11		
MonthlyExcessiveAbsences	09/25/2019 12:00 AM	
YearlyExcessiveAbsences	09/30/2019 12:00 AM	
#: 697009		
Grade: 10		
ConsecutiveHabitualTruancy	09/09/2019 12:00 AM	
MonthlyExcessiveAbsences	09/10/2019 12:00 AM	
MonthlyHabitualTruancy	09/12/2019 12:00 AM	
YearlyExcessiveAbsences	09/17/2019 12:00 AM	
ConsecutiveHabitualTruancy	09/18/2019 12:00 AM	
YearlyHabitualTruancy	09/18/2019 12:00 AM	
ConsecutiveHabitualTruancy	09/30/2019 12:00 AM	
#: 697122		
Grade: 09		
MonthlyExcessiveAbsences	09/23/2019 12:00 AM	

EMIS

In SpecialServices, information from special education documents can be extracted in the state-mandated format and imported into StudentInformation or a data collection tool. For more information, see [“Viewing the Data Collection Form.”](#)

Note: Users with the appropriate security privileges can also access the **SpecialServices EMIS Extract** screen in StudentInformation. For more information, see the ProgressBook SpecialServices Administrator Guide.


Viewing the Data Collection Form

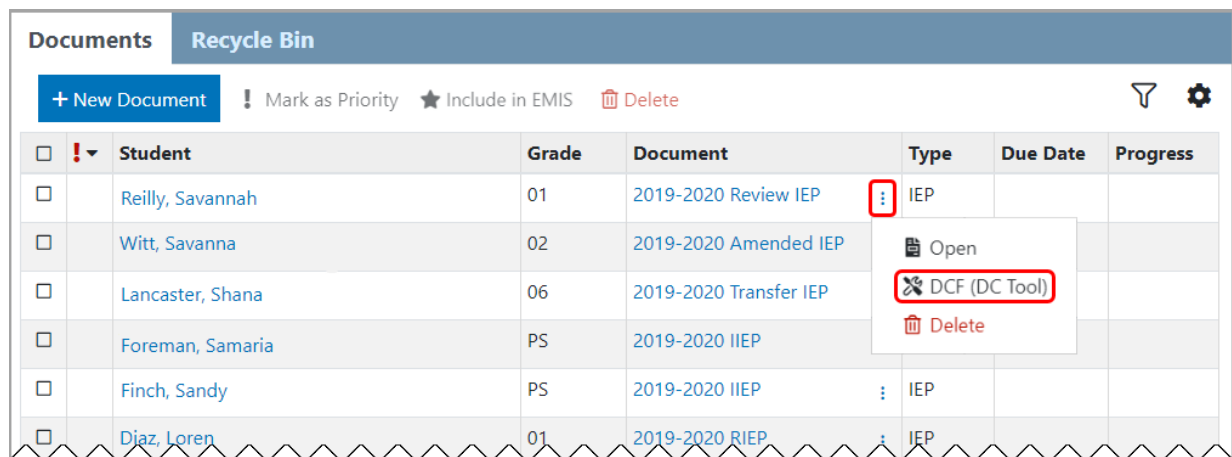
The **Data Collection Form** (DCF) lets districts record required EMIS information that is reported to ODE. You can access the DCF on the **Student Documents** screen **Documents** tab or the overview version of the **Student Documents** screen.

- [“Accessing the DCF From the Documents Tab”](#)
- [“Accessing the DCF From the Document Overview”](#)

Accessing the DCF From the Documents Tab



Navigation: SpecialServices > Student Documents > Documents tab

1. On the **Student Documents** screen **Documents** tab, in the row of the document for which you want to view the **Data Collection Form**, click .
2. In the drop-down list that displays, select **DCF (DC Tool)**.



Documents		Recycle Bin				
+ New Document		! Mark as Priority	★ Include in EMIS	🗑 Delete	🔍	⚙
<input type="checkbox"/>	! Student	Grade	Document	Type	Due Date	Progress
<input type="checkbox"/>	Reilly, Savannah	01	2019-2020 Review IEP	IEP		
<input type="checkbox"/>	Witt, Savanna	02	2019-2020 Amended IEP	IEP		
<input type="checkbox"/>	Lancaster, Shana	06	2019-2020 Transfer IEP	IEP		
<input type="checkbox"/>	Foreman, Samaria	PS	2019-2020 IIEP	IEP		
<input type="checkbox"/>	Finch, Sandy	PS	2019-2020 IIEP	IEP		
<input type="checkbox"/>	Djaz, Loren	01	2019-2020 RIEP	IEP		

The Data Collection Form displays.

 Print
  Exit Preview

EMIS Data Collection Form for Students with Disabilities

City Schools
Savannah Reilly

CHILD'S INFORMATION

NAME: Savannah Reilly DISTRICT OF RESIDENCE: Example District of Residence
 ID NUMBER: xxxxxxxx GRADE: 01 DISTRICT OF SERVICE: Example District of Service
 DATE OF BIRTH: 07/06/2012 GENDER: F DISABILITY CATEGORY: ** - Not Applicable (**)
 BUILDING OF ATTENDANCE: Example Elementary School DISABILITY START DATE (if changed):

SPECIAL EDUCATION EVENTS

CODE	EVENT DATE	OUTCOME ID	START DATE	END DATE	NON-COMPLIANCE ID
PSTC			---	---	---
RIEP	10/31/2019	IE64 - PS-SpEd Program - Residential Facility			03 - Staff Not Available - School Year
CIEP		---	---	---	---
SEMD		---	---	---	---

SECONDARY PLANNING ELEMENT (Result of transition planning on the IEP for students age 14 and above): TFGY FYG Transition Plan in Place

SERVICES (Including Preschool Itinerant Services, if applicable)

SERVICE	START DATE	END DATE	SERVICE	START DATE	END DATE
No Services Found					

IEP REQUIRED TEST TYPE (Method student will take tests in general, not limited to state testing): STA Standard with accommodations

OHIO GRADUATION EXEMPTIONS

Is the child excused from the consequences of not passing the required graduation tests? YES NO

The child is excused from the consequences of not passing the required graduation tests in the following subjects:

-

DISTRICT REPRESENTATIVE SIGNATURE: _____ DATE: _____

EMIS DATA COLLECTION FORM REVISED BY SPS: September 19, 2018
Page 1 of 1

Note: To print the **Data Collection Form**, click **Print**. Then, follow the printing procedure for the browser you are using.

Note: To return to the **Student Documents** screen **Documents** tab, click **Exit Preview**.

Accessing the DCF From the Document Overview

Navigation: SpecialServices > Dashboard

OR

SpecialServices > Student Documents

OR

SpecialServices > Student Profile > Special Education tab

1. On the **Dashboard** screen, **Student Documents** screen, or **Student Profile** screen **Special Education** tab, click the name of the document for which you want to view the **Data Collection Form**.

Student	Grade	Document	Type	Due Date	Progress
Reilly, Savannah	4	2019 - 2020 RIEP	IEP	01/26/2020	95%
Witt, Savanna	4	2019 - 2020 RIEP	IEP	01/28/2020	100%
Lancaster, Shana	4	2019 - 2020 RIEP	IEP	01/23/2020	100%
Goff, Silvia	4	2019 - 2020 RIEP	IEP	01/23/2020	100%
Finch, Sandy	4	2019 - 2020 RIEP	IEP	01/27/2020	100%

The overview version of the **Student Documents** screen displays.

2. On the overview version of the **Student Documents** screen, click **View DCF**.

Reilly, Savannah Example Middle School ID: xxxxxx Grade: 4 Case Mgr: Smiles, Mary Homeroom: Mccarthy, Joy



2019 - 2020 RIEP [View DCF](#) [Print Preview](#) [Add Additional Forms](#) [Delete](#)

Due: 01/26/2020 Created By: Smiles, Mary

Individualized Education Plan Overview 95%

- Cover Page ✓ Completed
- 1. Future Planning Edit
- 2. Special Instructional Factors ✓ Completed
- 3. Profile ✓ Completed
- 4. Extended Services ✓ Completed
- 6. Measurable Annual Goals 1 Goal ✓ Completed
- 7. Specially Designed Services ✓ Completed
- 8. Transportation ✓ Completed

The Data Collection Form displays.

 Print
  Exit Preview

EMIS

City Schools
Savannah Reilly

Data Collection Form for Students with Disabilities

CHILD'S INFORMATION

NAME: Savannah Reilly DISTRICT OF RESIDENCE: Example District of Residence
 ID NUMBER: xxxxxxxx GRADE: 01 DISTRICT OF SERVICE: Example District of Service
 DATE OF BIRTH: 07/06/2012 GENDER: F DISABILITY CATEGORY: ** - Not Applicable (**)
 BUILDING OF ATTENDANCE: Example Elementary School DISABILITY START DATE (if changed):

SPECIAL EDUCATION EVENTS

CODE	EVENT DATE	OUTCOME ID	START DATE	END DATE	NON-COMPLIANCE ID
PSTC			---	---	---
RIEP	10/31/2019	IE64 - PS-SpEd Program - Residential Facility			03 - Staff Not Available - School Year
CIEP			---	---	---
SEMD			---	---	---

SECONDARY PLANNING ELEMENT (Result of transition planning on the IEP for students age 14 and above) TIFYG FYG Transition Plan in Place

SERVICES (Including Preschool Itinerant Services, if applicable)

SERVICE	START DATE	END DATE	SERVICE	START DATE	END DATE
No Services Found					

IEP REQUIRED TEST TYPE (Method student will take tests in general, not limited to state testing): STA Standard with accommodations

OHIO GRADUATION EXEMPTIONS

Is the child excused from the consequences of not passing the required graduation tests? YES NO

The child is excused from the consequences of not passing the required graduation tests in the following subjects:

- No Subjects Found

DISTRICT REPRESENTATIVE SIGNATURE: _____ DATE: _____

EMIS DATA COLLECTION FORM REVISED BY SPS: September 19, 2018 Page 1 of 1

Note: To print the **Data Collection Form**, click **Print**. Then, follow the printing procedure for the browser you are using.

Note: To return to the document overview version of the **Student Documents** screen, click **Exit Preview**.