



- 1 On the **Dashboard** screen, **Student Documents** screen **Documents** tab, or **Student Profile** screen **Special Education** tab, click **New Document**.
- 2 On the **Create New Document** window that opens, to search for a student, in the **Student** field, enter 2 or more letters of the 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.
- 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) If you want to use a different name for the document than the default name, enter a **Name** in the field.
- 6 (Optional) If you want to create this document for a different school year than the current school year, select a **School Year** from the drop-down list.
- 7 (Optional) If you want to create this document for a different grade level than the student's current grade level, select a **Grade Level** from the drop-down list.
- 8 In the **Due Date** field, enter or select a due date.
- 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 account.
- 11 (Conditional) If the document is an IEP, ETR, SP, 504P, or MD and you want to exclude it from the EMIS extract, select the **Exclude from EMIS** checkbox. If you do not select the checkbox, the document is included in the EMIS extract.
- 12 Click **Create**.

SpecialServices > Student Documents

Documents Recycle Bin

1 + New Document ! Mark as Priority Delete

Create New Document Click to clear Student Field x

2 Student Haynes, Sharon x

3 Document Individualized Education Plan v

4 Type Initial IEP v

5 Name 2019-2020 Initial IEP

6 School Year 2019-2020 v

7 Grade Level 12 - 12 v

8 Due Date 10/01/2020

9 Copy From Select Document to Copy... v

10 Mark as Priority

11 Exclude from EMIS

Cancel 12 Create

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.