WSIPC Guide to Special Education

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About This Guide

The Special Education module allows districts to track and manage Special Education information on students. It contains all of the data elements required to produce Special Education State Reports such as the P223H Monthly Special Education Enrollment Report, Initial Evaluation Timeline Report, Transition From Part-C to Part-B Report, and CEDARS Reports. In addition to State Reporting, the Special Education module assists districts in tracking a student through the Special Education process, and provides the tools you need to manage the student's Special Education data and keep that data up-to-date.

This Guide shows you how to manage Special Education data and how to perform the following tasks related to tracking and sharing Special Education information:

- Managing Special Education data using the Special Education Student Profile
- Running Special Education Reports
- Using Special Education Utilities
- Using other access options so that Case Managers and IEP Managers can view their Special Education caseload information
- Using other access options so that administrators and teachers can view Special Education information for students in their building
- Configuring the Special Education module for use, including adding Special Education Codes, Staff, Services, and Forms
- Setting up Special Education Auto Emails and Student Indicators for students who qualify for Special Education services

The following areas are outside the scope of this Guide:

- Details about Student Demographics
- Details about Test Scores
- Details about Educator Access Plus

What You Should Know Before You Start

You'll find that the Guide is much more helpful if you have a general understanding of Special Education state and federal guidelines, your district's Special Education business processes, and basic Special Education concepts and terminology.

Be Sure You're Signed In

This Guide is intended to be read while you are working in the Special Education module, so be sure you are signed in. Many of the procedures and concepts discussed in the Guide are best understood if you practice as you read.

How to Use This Guide

This section shows you how to follow navigation paths in a Guide, and how to navigate around the Guide using various features. This section also describes how and when screen shots are used in the Guide.

Navigation Paths

The procedures in this Guide begin with navigation menu paths. Select the Display Navigation Menu Paths check box in User Preferences to ensure that you can follow these paths. The option is not available in User Preferences if it is already enabled for the entire district. To learn more about setting User Preferences, see the *WSIPC Guide to Skyward's School Management System*.

Getting Around

If you're using this Guide electronically, you can click any text in blue font to move to the section of the Guide that the text refers to. Because the Guides are published in PDF format, you can also use the PDF navigation pane to quickly move from one section to another. If the pane is hidden, click the Bookmark button in the menu bar on the left side of the screen.

Screen shots

You'll find screen shots throughout the guide to help you learn how to use the software. These screen shots are updated with each edition to make sure what you see on your screen matches what you see in the Guide. To prevent the Guide from becoming a lengthy picture book, WSIPC Guides use screen shots only to help illustrate a key idea or when options on a screen are described. This allows WSIPC Guides to be effective *and* concise.

What is in a WSIPC Guide

WSIPC Guides are designed to provide readers with everything they need to know to safely and effectively use Skyward's software. WSIPC strives to make Guides that address the diverse needs of these audiences. Therefore, this Guide doesn't contain information customized for specific audiences, districts, or schools.

If you need to create educational materials that address the specific needs of your Service Center or district, consider using this Guide as a starting point for developing your own customized materials.

What's New in This Edition

This section highlights the significant changes to the Guide since the last edition such as content about new features, important notes and warnings, and sections of the Guide that have been expanded or moved.

Description of Change	Page #
This Guide has been updated to reflect WSIPC's July 2015 software release version 05.15.06.00.02.	N/A
Updated all dates to reflect the 2015-2016 school year.	N/A
Added a new section: "Adding Evaluation and IEP Forms."	43
Added information about new Medicaid options: Annual Billing Notification and Billing Consent.	50
Added a new section: "Using the Staff Calendar."	59
Added a new section: "Using Special Education Forms."	59

Description of Change	Page #
Added a new section: "Cloning to Split an IEP between Two Evaluations."	83
Added a section for a new utility: "Mass Exit Special Education Students Utility."	114
Added a section for a new utility: "Update Medicaid Eligibility Flag."	117
Added information about Message Center to the "Using Case Manager" section.	121
Added information about Message Center to the "Using IEP Manager" section.	126
Added information about Message Center to the "Using Service Provider Access" section.	130
Added information about Message Center to the "Using Team Member Access" section.	131
Added information about the Display Only SE Staff for Case/IEP Manager option to "Configuring Special Education Options" section.	135
Updated the "Setting Up Teacher Access Display Options" section in "Configuring Special Education Options."	150
Added the Defaults option to "Table 28 - District Service Maintenance options".	176
Added a new section: "Configuring Special Education Custom Forms."	195
Added a new section: "Using the Special Ed WIP Evaluation or IEP Indicator."	205
Added the Do not show Indicator in Educator Access Plus option to the "Using the Special Ed Program Indicator" section.	206

Using the Special Education Student Profile

The Special Education Student Profile displays a single student's Special Education information and is organized by tabs, sub-tabs, and screens.

To use the Special Education Student Profile:

- Go to Student Management\Student Services\SE\PR.

The Special Education Student Profile (Figure 1) contains four main parts:
1. Tabs and Sub-tabs
2. Student Demographic Header
3. Special Education Header
4. Body

The sections below explain each of these parts.

Figure 1 - Special Education Profile with the four main parts outlined

Tabs and Sub-Tabs

A Profile screen organizes information using a list of tabs and sub-tabs on the left side of the screen. You can change the order of the tabs and hide tabs that you do not use on a regular basis. To learn how to customize your tabs in the Special Education Student Profile, see the *WSIPC Guide to Skyward's School Management System*.

Figure 2 shows the Special Education Student Profile with the Evaluation Information tab selected and highlighted for reference.

Tabs listed with an arrow next to them indicate that there are one or more sub-tabs available. In Figure 2, the student has an arrow next to the IEP Information tab. When the arrow is expanded, the list of sub-tabs available for that student appears. In this example, three IEP Records are listed for the student. The date displayed in the sub-tab list is the Start IEP date for that IEP, as indicated by the IEP Type Code of "S" in front of the IEP date. The Start IEP date is the default date that displays from the IEP but districts can configure other dates from the IEP to appear on the sub-tab and whether or not to display the IEP Type Code. To learn more about configuring which IEP date to display, see the "Setting Up Student Profile Options" (page 148).

The following tab names are preceded by an asterisk when data exists under that tab for the student you are viewing.

- Referral
- Disabilities
- Contacts
- Team Members
- Recheck
- Medicaid
- IHP

Figure 2 – Special Education Student Profile tabs and sub-tabs display on the left side of the screen

Student Demographic Header

Student Demographic Header information appears at the top of the screen for all of the tabs in the Special Education Student Profile.

Information from Student Demographics is displayed in three rows. The first two rows contain basic student demographic information, including Student Indicators. You can customize the third row to display other demographic information that you want visible at all times while working in the Special Education Student Profile. Click the Customize link located just above the third row to make any changes.

Figure 3 shows the section of the header that displays information from Student Demographics.

Use the left and right arrows to move to the next or previous Special Education student in alphabetical order. The students who are available in the Special Education Student Profile are determined by the Ranges you define. To learn how to set the ranges in the Special Education Student Profile, see "Setting Special Education Student Ranges" (page 70).

The student demographic header information contains an Add Student button. This is used to add a student to the Special Education module. To learn more about this function, see "Adding a Student to Special Education" (page 12).

Next to the student's Default Entity, School, and Status, is the Student Indicator box. All of the indicators configured for the entity appear in this box if the student's information meets the criteria for the indicators. In the example in Figure 3, the student has a green colored "D" and a red colored "H" indicator. When you position the cursor over a specific indicator, you see a brief description for the indicator. To view details about all the indicators for a student, click anywhere in the indicator box. To learn more about configuring indicators for Special Education students, see "Using Special Education Student Indicators" (page 204).

Figure 3 – Student Demographic header information

Click the Student Information ⓘ icon next to the student's name to view the Student Information screen (Figure 4). This screen provides a summary view of the student's demographic information that appears within Student Profile (Student Management\Students\ST\PR).

If you do not see the ⓘ icon next to the student's name, or don't see all the information on the Student Information screen you need, contact your district's security administrator to discuss expanding your view of student data.

Note	The security line item, WS\ST\SI\IF, determines whether the ⓘ icon appears on the Student Demographic header and what data appears on the user's Student Information screen.

Figure 4 – The Student Information screen with demographic information for the student

Special Education Header

Special Education Header information appears near the top of the screen at all times in the Special Education Student Profile. Figure 5 shows the section of the header that displays information from Special Education.

Information displayed in the Special Education Header includes a list of the student's Evaluation Records on file and their current Special Education Exit information.

The information displayed in the Evaluations List includes the Evaluation Start and Date Created, the Type of Evaluation (T of E), Evaluation Type (T), Response Date, Status, and Completion Date (Compl Date).

The Special Education Header includes a number of different buttons that are used to add, edit and delete Evaluation information. To learn more about these buttons, see "Maintaining Evaluation Information" (page 71).

The additional functions within the Special Education Header information are explained in detail in "Additional Special Education Header Functions" (page 75).

Figure 5 – Special Education header information

Body

When you select a tab or sub-tab, related information appears in the Body of the Profile screen. Figure 6 is an example of the information that appears when you click the Disabilities tab. The tab's or sub-tab's title appears at the top of the screen and also at the top of the body portion of the screen.

Any existing data for the student appears in the Body of the screen. The Body also includes options for managing the data in that area.

Figure 6 – Body of the Special Education Student Profile with the Disabilities tab selected

Adding a Student to Special Education

To add a student to the Special Education module, the student must first be enrolled in an Entity in your district as a basic education student. Through the basic education enrollment process, you enter the student's demographic information, such as their Name, Birth Date, Gender, Language, Family Information, Emergency Contacts, and School Information. To learn how to enroll a student in basic education, see the *WSIPC Guide to Student Demographics and Families*. Once basic education enrollment is complete, you can add the student to the Special Education module and track their Special Education information.

As a minimum, the student must have a Special Education evaluation in process. This begins the tracking of Special Education data in the Special Education module. The student's Special Education information can be maintained from Entity 000 or at the building level. Since Special Education is managed by your district's Special Education department, the information is usually maintained from Entity 000.

Adding a student to Special Education involves the following core processes:

- Selecting a Student to Add to Special Education
- Adding Referral Information
- Adding Consent Information
- Adding Evaluation Information
- Adding Disability Information
- Adding IEP Information

These core processes complete all of the necessary fields of data used to produce State Reports for your district, and are explained in this section.

Note	You can maintain additional data and use more features in the Special Education module to track students through the Special Education process. To learn more about maintaining additional data, see "[Maintaining Other Special Education Information](#)" (page 33).

Selecting a Student to Add to Special Education

Once the student is enrolled in an Entity in your district, he or she is available to select in the Special Education module. The students available for you to select depends on which Entity you are signed in to. For example, if you are signed in to a specific Entity, you can only select a student from that particular Entity. However, if you are signed in to Entity 000, you have access to all students within your district.

The procedure described below is for a student who has never had Special Education Records in your district.

To select a student to add to Special Education:

1. Go to Student Management\Student Services\SE\PR.

2. On the right side of the Student Header, click Add Student.

3. In the Student Information area on the Evaluation Maintenance screen (Figure 7), do one of the following to find and select the student to add:

    ▪ In the Name box, type the student's Namekey if known, or up to the first 5 characters of the student's last name. Matching Namekeys are listed for you to select from. Click the student to be added.

Note	In the example in Figure 7, the student to be added is Lavette Allensworthscr. After entering the first five characters of her last name in the Name box, Lavette and other students with matching Namekeys appear below the Name box for selection.

    ▪ Click the Name link to access the Students Available to Add to Special Education list (Figure 8). Students are listed in alphabetical order based on the selected Filters. The With SE column contains a "Y" if the student is already a Special Education student. Locate the student to be added and click Select.

Note	If you are working in an Entity other than 000, not all of the students available in the district are listed. To see all students in your district, click the Back button to navigate to the Special Education Student Profile main screen. Select Entity 000 from the Entity box at the top of the screen.

Tip	To list only students with a CY Status of Active, select the Only Active Students filter at the top of the screen.

4. In the Hardcopy File Number box, enter a Hardcopy File Number if your district assigns this to Special Education files.

5. Do one of the following:

    ▪ If the student's evaluation is complete and the student qualifies for Special Education services, select the Special Education Student check box located below the Name box.

    ▪ If the student's evaluation is not complete or the student does not qualify for Special Education services, do *not* select the Special Education Student check box.

6. Once the student is selected and the Student Information is completed, continue to "Adding Referral Information" (page 16).

Figure 7 – Adding a student using the Name box in the Student Information area on the Evaluation Maintenance screen

Figure 8 – Adding a student using Students Available to Add to Special Education list

Adding Referral Information

After you select a student to add to Special Education, you are ready to add referral information. A referral is when someone such as the student's teacher, or parent, or physician believes the student needs Special Education services, and the Special Education team decides an evaluation is warranted. To satisfy State Reporting requirements, you must enter the referral date and who referred the student at a minimum.

To add referral information:

1. Continuing from the procedure described in "Selecting a Student to Add to Special Education" (page 68), configure the Referral Information area (Figure 9). Table 1 explains the options in this area.

2. Continue to "Adding Consent Information" (page 18).

Figure 9 – The Referral Information area of the Evaluation Maintenance screen

Option	Description
Date of Referral	Date the person or agency submitted the referral to district personnel. Included in the CEDARS extract if the referral is for an Initial Evaluation.

Option	Description
Referral Type	Indicates the type of Referral. ▪ Part-B – For students who are 3 years of age or older. ▪ Part-C – For Birth through 2 years of age, for students who will have an IFSP if qualified for Special Education services.
Person Making the Referral	Name of the person submitting the referral, if that person's name is found in your district Name Table. Use the Person Making Referral hyperlink to select from a list of names defined in your district. The Default Name Types filter includes people with the following Name Types: ▪ STA – Staff ▪ HEA – Health Professionals ▪ GUR – Guardians ▪ EMR - Emergency Contacts Click Filter Options to select only one of these Name Types. **Note:** You must have a value in either the Person Making the Referral box or the Not in Name Table box to save the Referral Record.
Not in Name Table	The name of a person or agency not defined in your district's Name Table. You can also use this box to enter a title such as "Classroom Teacher" instead of a person's name. **Note:** You must have a value in either the Person Making the Referral box or the Not in Name Table box to save the Referral Record.

Option	Description
Reason for Referral	Indicates the reason the student was referred to Special Education. Select from a list of district-defined codes. These codes may correspond to the possible reasons listed on your District Referral form. Examples could indicate the areas of concern, such as Cognitive, Academics, Speech, Math, and Reading.
Referral Comment	Text box to record any comments regarding the Referral.

Table 1 - Referral Information options

Adding Consent Information

Parental consent must be provided before a student can be initially evaluated for Special Education services. The Evaluation Permission and Permission Date boxes on a student's Initial Evaluation are required for Federal/State Reporting.

To add consent information:

1. Continuing from the procedure described in "Adding Referral Information" (page 16), configure the Consent Information area (Figure 10). Table 2 explains the options in this area.

2. Continue to "Adding Evaluation Information" (page 20).

Figure 10 - The Consent Information area of the Evaluation Maintenance screen

Option	Description
Evaluation Permission	Shows whether or not the district has permission to evaluate the student (Yes or No). Required for the Initial Evaluation Timeline and Transition From Part C to Part B State Reports.
Permission Date	Date permission was given by the child's guardian to allow the district to evaluate the student. Districts may enter either the date the Consent for Evaluation was signed by the parent/guardian or the date the Consent for Evaluation was received by the district. Required for the Initial Evaluation Timeline and Transition From Part C to Part B State Reports. The Permission Date to starts the 35-day timeline for the Initial Evaluation Timeline State Report. If the Type of Evaluation is Evaluation, the Permission Date starts the Case Due timeline defined in Special Education Configuration. To learn more about configuring the Case Due calculation, see "Configuring Special Education Options" (page 135).
District Received Date	Date district received the signed consent (permission) for Evaluation. The date in the District Received Date box is not used in State Reporting. If your district's policy states that the 35-day timeline starts from the date you received the Consent for Evaluation, and not the date that the consent was signed, enter the received date into the Permission Date box.
Placement Consent Given	Indicates whether or not the district has permission to provide services for the student (Yes or No).

Option	Description
Placement Consent Date	Date the parent/guardian gave consent for the district to provide the services described in the student's Initial IEP.
Request for Consent	Date consent was requested from the parent or guardian. The date that appears is defined in Special Education Configuration. To learn more about configuring the date calculation, see "Configuring Special Education Options" (page 135). **Note:** This field is not used in Washington State Reporting.

Table 2 - Consent Information options

Adding Evaluation Information

Evaluations determine if a student qualifies for Special Education services. Each Evaluation is valid for three years. After three years, the Evaluation expires. Students must have a valid Evaluation to be included in Federal/State Reports.

To add Evaluation information:

1. Continuing from the procedure described in "Adding Consent Information" (page 18), configure the Evaluation Information area (Figure 11). Table 3 explains the options in this area.

2. Click Save.

Figure 11 – The Evaluation Information area of the Evaluation Maintenance screen

Option	Description
Type of Evaluation	Used to determine which Evaluation Records to consider for the Initial Evaluation Timeline, Transition From Part C to Part B, and CEDARS State Reporting. ▪ Evaluation: Indicates that the Evaluation being entered is the *Initial* Evaluation for the student. This is the default on the first Evaluation for a student. ▪ Reevaluation: Indicates that the Evaluation being entered is *not* the Initial Evaluation for the student, but that the student has been reevaluated. ▪ Transfer: Indicates that the student transferred into your district and that you accepted the eligibility determination documented in the Evaluation from the sending district.
IDEA Part C	Used to determine if the student should be included in the Transition From Part C to Part B State Report. Select if the student's Evaluation falls under the IDEA Part C criteria and will be served with an IFSP. This option is available if the Evaluation Completed date is blank or before the student's third birthday.
Evaluation Type	Further identifies the Type of Evaluation selected for this record. For example, a code of WVR could be used to indicate that the Reevaluation was fulfilled by a Wavier of Reevaluation. These codes are district defined.
Work in Progress (WIP)	Indicates that the Evaluation is not complete. Evaluations marked as Work in Progress are not included in any Federal/State Reports. When an Evaluation Completed date is entered, the Work in Progress check box is automatically cleared.

Option	Description
Void Evaluation	Allows you to mark an Evaluation as Void instead of deleting the Evaluation from the software. If the Evaluation was entered on the incorrect student, the Evaluation should be deleted from the student and entered on the correct student. Typically, Evaluations created in error are deleted, not voided.
Evaluation Start	Date the Evaluation process starts. Typically this is the same date as the Permission to evaluate.
Case Due	Date the Evaluation case is due. For an Evaluation with the Type of Evaluation set to Evaluation, the Case Due is calculated starting with the Permission Date and adding the number of days entered in the Case Due Number of Days box on the Special Education Configuration screen. For Evaluations with a Type of Evaluation set to Reevaluation or Transfer, the Case Due is calculated starting with the Evaluation Start date and adding the number of days entered in the Case Due Number of Days box on the Special Education Configuration screen. To learn more about configuring the Case Due date, see "Setting Up Date Calculations" (page 137).
Last Team Meeting	Date the team last met regarding the student's Special Education Records.
Next Evaluation	Date the student's next Evaluation is due. This date is automatically calculated 3 years out. If an Evaluation Completed date is not entered, it is calculated from the Evaluation Start date. If an Evaluation Completed date is entered, it is calculated from the Evaluation Completed date.
Evaluation Notice	Date the Evaluation Notice was sent to the Guardian. For Washington State school districts this could be used for the Evaluation Meeting Invitation or the Prior Written Notice after the Evaluation meeting.

Option	Description
Psychological Eval Date	Date of the student's psychological Evaluation.
Start Next Evaluation	Date the next Evaluation should start. This date is automatically calculated using the value in the Start Next Evaluation Date = Next Evaluation Date – XX days box on the Special Education Configuration screen. To learn more about configuring the Start Next Evaluation date, see "Setting Up Date Calculations" (page 137).
Evaluation Extension	Date the Initial Evaluation was extended to for completion. In Washington State the timeline to complete an Initial Evaluation is 35 days. When the district and the parents agree to extend that timeline, a date for completion is agreed upon.
Psychiatric Exam	Date of the student's psychiatric exam.
Status of Evaluation	Current status of the student's Evaluation. Your district determines the code and descriptions you use in your district. Since Status of Evaluation Records are used to determine if the student's Evaluation should be included in State Reporting, it's important that you select the correct Reporting Status value for each code you add. To learn more about Status of Evaluation Codes along with descriptions of the Reporting Status values, see "Setting Up Special Education Codes" (page 151).
Evaluation Completed	Date the Evaluation was completed. This date determines whether the student has a valid Evaluation for State Reporting. It also begins the 3 year timeline for reevaluation.

Option	Description
Timeline Reason	Reason the Initial Evaluation is not completed within the 35 school days required. The Initial Evaluation Timeline is calculated starting from the Permission Date through the Evaluation Completed date. Valid Initial Evaluation Timeline Report values with the long description are as follows: ▪ **DIS** – District scheduling/staffing issues ▪ **EXT** – Parent and district agree to extend the evaluation timeline ▪ **FAI** – Parent repeatedly fails to produce the child for evaluation ▪ **OTH** – Other reason ▪ **TRF** – Student transfer in from another district but the evaluation is not yet completed by the sending district The following message appears when you click Save on an Initial Evaluation that exceeds the 35 school day timeline: "Numbers of school days between the parental permission date and evaluation complete is greater than 35. Please enter a reason for missing the timeline. Select OK to save current data, Cancel to go back and edit data."

Option	Description
Transition Reason	Reason a student transitioning from IDEA Part-C into Part B did not meet the required timeline. Valid Transition From Part C to Part B Report values with the long descriptions are as follows: **DIS** – District scheduling/staffing issues **EXT** – Parent and district agree to extend the evaluation timeline **FAI** – Parent repeatedly fails to produce the child for evaluation **OTH** – Other reason **REF** – Parent refusal to provide consent **RPB** – Child was referred to Part B less than 90 days prior to 3rd birthday **RPC** – Child was referred to Part C less than 90 days prior to 3rd birthday **TRF** – Student transfer in from another district but the evaluation is not yet completed by the sending district **TRN** – Transition planning meeting convened by Part C did not occur at least 90 days prior to 3rd birthday Required when the Evaluation Completed date occurs after the student's 3rd birthday.
Case Manager	The staff member assigned to the student who coordinates all aspects of the student's Evaluation and in some cases their IEP.
Agency Where Enrolled	District where the student receives Special Education service(s).
Special Ed School	School building where the student receives Special Education service(s).

Option	Description
Eval Approval Status	The approval status of the Evaluation that is linked to the Evaluation Form for the student. This option was designed for another state and has no effect on Washington State school districts.
Status Set by	Shows which user set the most recent Eval Approval Status. This option was designed for another state and has no effect on Washington State school districts.
Evaluation Locked	Locks the Evaluation. Locked Evaluations cannot be edited by anyone other than the person who locked it. ⚠️ **Caution**: If a student's locked Evaluation Record needs to be corrected for Federal/State Reporting, and the user who locked the Evaluation in unavailable to unlock it, you must run the Lock/Unlock Evaluations and IEPs Utility. The Lock/Unlock Evaluations and IEPs Utility can be used to override the locked Evaluation for a single student or a range of students. To learn more about this utility, see "Running Special Education Utilities" (page 110).
Locked by	User who locked the student's Evaluation. This value cannot be changed.
Reason Locked	Text box to indicate why you locked the student's Evaluation.

Table 3 – Evaluation Information options

This completes all sections of the Evaluation Maintenance screen for a student new to Special Education. The student has been added to the Special Education module with an Evaluation Record.

Continue with "Adding Disability Information" (page 28), and "Adding IEP Information" (page 29) to complete the student's Special Education Record.

Adding Disability Information

If a student qualifies for Special Education services, he or she has been identified as having one of the 14 state-defined disabilities through the evaluation process. A student may have more than one disability assigned, but only the Primary Disability is used for State Reporting.

To add Disability information:

1. Go to Student Management\Student Services\SE\PR.

2. Click the Disabilities tab.

3. To the right of the Disabilities list, click Add.

4. Configure the Disability Maintenance screen (Figure 12). Table 4 describes the options on this screen.

5. Click Save.

6. Repeat steps 3 through 5 to add additional disabilities.

Figure 12 – Disability Maintenance screen

Option	Description
Disability	Identifies the disability the student qualifies under. For the student to qualify for Special Education services, at least one Disability must be added.
Primary Disability	Indicates that the disability is the student's primary disability. At least one disability must be indicated as Primary for Washington State Reporting.
Eligibility Criteria	Free-form text box to describe the student's eligibility criteria for this disability.

Table 4 – Options on the Disability Maintenance screen

Adding IEP Information

If the student qualifies for Special Education services, the IEP Team develops a program of services the district will provide for the student. The Individual Education Program (IEP) contains the information required by OSPI to provide services for the student. The information tracked in the Special Education module is a sub-set of information contained in the student's complete IEP. IEPs are written each year, with a single IEP expiring after one year. To be included in some of the State Reports, a Special Education student must have a valid IEP.

To add IEP information:

1. Go to Student Management\Student Services\SE\PR.

2. Click the IEP Information tab.

3. To the right of the IEP Information area, click Add.

4. Configure the Individual Education Plan Maintenance screen (Figure 13). Table 5 describes the options in the IEP Information area of the Individual Education Plan Maintenance screen.

5. Click Save.

Figure 13 – The Individual Education Plan Maintenance screen

Option	Description
Start IEP	Start date of the IEP. The current date defaults as the Start IEP date, but typically needs to be changed to reflect the actual IEP start date.
End IEP	End date of the IEP. The End IEP date is automatically calculated as one year minus one day from the Start IEP date. This calculation occurs when you enter the Start IEP date and press the Tab key on your keyboard to move out of the field. The End IEP date cannot be greater than one year minus one day from the Start IEP date.
Work in Progress	Allows you to mark the IEP as Work in Progress which indicates that the IEP is not complete. IEPs that are marked as Work in Progress are not included in any State Report.
Created	Date the IEP information was entered into the software. Defaults to the current date and cannot be changed.
IEP Meeting	Date the IEP meeting to discuss the current IEP occurred.

Option	Description
Service Plan	Indicates that the district is providing a Service Plan for a Private school student instead of an IEP.
Review IEP	Date the IEP team wants to review the student's IEP.
IEP Revision	Date the IEP was revised.
Extended School Year Required	Indicates that the student requires services to continue after the normal school year ends.
IEP Type	Code to identify the type of IEP Record. Examples of this are Initial, Review, Transfer or Amendment. IEP Type Codes are district defined. To learn more about IEP Type Codes, see "Setting Up Special Education Codes" (page 151).
IEP Manager	The staff person assigned to the student who coordinates all aspects of the student's IEP which includes instruction, related services and assuring overall compliance.
Least Restrictive Environment (LRE)	Least Restrictive Environment Codes categorize students based on the amount of time they spend in regular classrooms or other facilities. LRE codes are defined by the State. LRE Codes is required for Federal/State Reporting. To learn more about LRE Codes, see "Setting Up Special Education Codes" (page 151).
IEP Approval Status	Approval status of the IEP that is linked to the IEP Form for the student. This option was designed for another state and has no effect on Washington State school districts.
Status Set by	Shows which user set the most recent IEP Approval Status.
Comments	Text box for entering comments related to the student's IEP.

Option	Description
IEP Locked	Locks a student's IEP. A locked IEP cannot be edited by anyone other than the person who locked it. ⚠ **Caution**: If a student's locked IEP Record needs to be corrected for Federal/State Reporting, and the user who locked the IEP in unavailable to unlock it, you must run the Lock/Unlock Evaluations and IEPs Utility. You can use the Lock/Unlock Evaluations and IEPs Utility to override the locked IEP for a single student or a range of students. To learn more about this utility, see "Running Special Education Utilities" (page 110).
Locked by	Shows the user who locked the student's IEP. This value cannot be changed.
Reason Locked	Text box for entering a reason why the student's IEP is locked.

Table 5 – Options in the IEP Information area on the Individual Education Plan Maintenance screen

Note	This completes the necessary information to add a student into the Special Education module. It also completes the data elements required for State Reporting.

Maintaining Other Special Education Information

Maintaining other Special Education information assists your district in managing students through the formal Special Education process and provides the ability to use reports and tools for tracking Special Education students.

Adding Placement Information

Placements allow you to enroll a Special Education student into specific services that are determined necessary as part of the student's IEP. The student must have an IEP created before you can enter Placement Records.

Student Placements are not required for State Reporting, but if entered, this information provides the district with certain tracking and reporting options.

Students can have several services entered as placements. Placements are selected from a list of District Services that must be configured and maintained by your district. To learn more about setting up District Services, see "Configuring the Special Education Module" (page 135). Special Education staff members are assigned to the services as the provider or teacher for that service.

When selecting services to add to a student's IEP, you have two options. You can select services from a list of District Services, or from a list of Special Education Staff who are assigned to services. Both options are described below.

To add Placement information from the District Services list:

1. Go to Student Management\Student Services\SE\PR.

2. Click the IEP Information tab.

3. Select the IEP Record where Placements will be added.

4. In the upper right of the IEP Information area, click the Placements button next to Scroll. Figure 14 shows the screen and the location of this option.

5. To the right of the Placements in this IEP list, click Add.

6. Locate the service the student is being enrolled in on the 2015-2016 District Services screen, and click Select.

Tip	When choosing a District Service from the list, use the Entity and Size column to verify you are selecting the correct service.

Note	If the services listed are not for the correct school year, click School Year in the upper right hand corner, enter the correct School Year, and click Apply.

7. Configure the lower portion of the Placement Maintenance screen (Figure 15). Table 6 describes the options on this screen.

Note	The top portion of the District Service Information screen is automatically populated from the District Service you selected to add to the student's placement list. If this is not the correct information, click Back and select the correct District Service from the list. To learn more about your district services, see "Configuring District Services" (page 171).

8. If you have more Placement Records to add, click Save & Add Next. Repeat steps 5 through 7 until all Placement Records are added.

9. When you are done adding Placements to the IEP, click Save & Close.

To add Placement information from the Special Education Staff list:

1. Go to Student Management\Student Services\SE\PR.

2. Click the IEP Information tab.

3. Select the IEP where Placements will be added.

4. Click the Placements button next to Scroll To at the top of the IEP Information screen. Figure 14 (page 37) shows the screen and the location of this option.

5. To the right of the Placements in this IEP list, click Add by Teacher.

6. On the Special Education Staff screen, locate the teacher assigned to the service you're adding to the student, and click Select.

7. Locate the District Service from the list that shows services assigned to the teacher you selected for a particular school year, and click Select.

Note	If the services listed are not for the correct school year, click School Year in the upper right corner, enter the correct School Year, and click Apply.

8. Configure the Placement Maintenance screen (Figure 15). Table 6 describes the options on this screen.

Note	The top portion of the District Service Information area on the Placement Maintenance screen is automatically populated from the District Service you selected to add to the student's placement list. If this is not the correct information, click Back and go to Step 4. To learn more about your district services, see "Configuring District Services" (page 171).

9. If you have more Placement Records to add, click Save & Add Next. Repeat steps 4 through 8 until all Placement Records are added.

10. When you are done adding Placements to the IEP, click Save & Close.

Note	District Services for Multiple School Years
	Most IEPs span two school years. However, District Services are defined for a single school year. For a service to cover the entire IEP, two matching District Services are added to the Placements, one for each school year contained in the student's IEP. Adding the service for the first school year automatically adds the service for the following school year as well, provided your District Services are defined for both school years.

Example:
In the Apple Valley School District, 2016 District Services are defined with a Begin Date of 08/15/2015 and an End Date of 06/17/2016.

In the same district, 2017 District Services are defined with a Begin Date of 08/15/2016 and an End Date of 06/17/2017.

A student with an IEP date range of 09/18/2015 through 09/17/2016 will have two placements listed to cover the same service for his or her IEP:

- One placement for 2016 (09/18/2015 through 06/17/2016)

- One placement for 2017 (08/15/2016 and end 09/17/2016)

To learn more about District Services, see "Configuring District Services" (page 171).

Figure 14 – IEP Information – Scroll To: Placements

Figure 15 – Placement Maintenance screen

Option	Description
Transfer	Indicates that the services are transferred. If this option is selected, you must record a Transfer Date and Transfer Reason.
Primary Placement	Indicates the student's Primary Placement. This is used in the Update IEP/Case Manager Utility and the Update Students Spec Ed School Utility.
Dismissed Placement	Indicates that the service has been dismissed. If selected, modify the placement End Date to reflect the date the student was dismissed.
Frequency	Frequency in which the student will receive the service. This box has no effect on the calculation of the Total Time field for the IEP Record. Frequency Codes are defined by the district. To learn more about IEP Frequency Codes, see "Setting Up Special Education Codes" (page 151).
Times Per Frequency	Number of times per frequency the student receives the service. For example, if the Frequency is set to Daily, how many times a day the student will receive the service.
Begin	The first day the student will receive the service. Defaults to the first day of the IEP or the Service Start Date, depending on which date is earlier.
End	Last day the student will receive the service. Defaults to the last day of the IEP or the Service End Date, depending on which date is later.
Breakdown	Text box in which the specific service breakdown information can be entered.

Option	Description
Direct Minutes/Week	Amount of time the provider spends working directly with the student in the classroom setting or in a separate area on specific skills. Minutes entered into this box calculate into the Total Time field for an IEP.
Indirect Minutes/Week	Amount of time the provider spends supporting the program outside of direct student contact.

Table 6 - Options on the Placement Maintenance screen

Adding Assessment Participation Information

As part of the student's IEP, a section is required to indicate how the student will participate in the State and District assessments. The Assessment Participation area allows you to enter this information and to link it to the tests defined by your district. With this information, you can then produce a report which includes how students will participate in each State and District test.

Note	The report that includes the assessment participation information was developed as a Crystal Report (Student Management\Custom Reports\Reports). This requires separate security from the Special Education module. To set up this report, contact your Information Service Center.

To add Assessment Participation information:

1. Go to Student Management\Student Services\SE\PR.

2. Click the IEP Information tab.

3. Select the IEP where Assessment Participation needs to be defined.

4. To the right of the IEP information, click AssmPart.

5. On the Assessment Participation screen, click Add.

6. Configure the Participation Maintenance screen (Figure 16). Table 7 describes the options on this screen.

7. Click Add to save the record.

8. Repeat steps 5 through 7 to add additional Test Participation Records.

9. When all of the Test Participation Records have been added, click Back on the Assessment Participation screen to return to the Special Education Student Profile.

Figure 16 – Participation Maintenance screen

Option	Description
Test Name	Name of the test the participation applies to. Enter the test name or click the Test Name link to select from a list of district defined tests. To learn more about how to set up the tests, see the *WSIPC Guide to Test Scores.*
School Year	School year in which the test will be taken by the student.
Test Grade Level	Grade level the student will be when the test is given.
Content Area	Sub-section of the test where the Participation may only apply.
Participation	Type of Participation for the student. Preset values are No accommodations, Accommodations, WAAS, and Exempt. **Note:** Only one type of Participation can be defined for each Test Name, School Year and Test Grade Level configured.
Comments	Text box to record any specifics regarding the type of Participation.

Table 7 – Participation Maintenance fields and descriptions

Adding Special Transportation Needs Information

Special Transportation Needs allows you to enter information about special transportation considerations for the student based on the student's disability and requirements for transporting them to and from school. Transportation information entered in the Special Education module appears in Student Profile (Student Management\Student\PR\Busing tab\Transport\Special Transportation Needs). This allows the school personnel to know of these special needs for transporting the student. To learn more about reporting this information, see "Running Special Education Reports" .

To add Special Transportation Needs information:

1. Go to Student Management\Student Services\SE\PR.

2. Click the IEP Information tab.

3. Select the IEP in which you are defining the Special Transportation Needs.

4. To the right of the IEP Information area, click Special Transport Needs.

5. On the Special Transportation Needs screen, click Add.

6. Configure the Special Transportation Maintenance screen (Figure 17). Table 8 describes the options on this screen.

7. Click Save.

8. When the Special Transportation Needs Records have been added, click Back on the Special Transportation Needs screen to return to the student's Special Education Student Profile.

Figure 17 – Special Transportation Maintenance screen

Option	Description
Transportation Code	Type of transportation needed. These codes are defined by the district. To learn more about Transportation Codes, see "Setting Up Special Education Codes" (page 151).
Notes	Text box to record any specifics regarding the type of participation.

Table 8 – Options on the Special Transportation Maintenance screen

Adding Evaluation and IEP Forms

Your district may choose to create and track information through specialized Evaluation and IEP forms. These forms are specific to your district and are typically created based on the needs of the Special Education department.

Adding Evaluation and IEP forms allows your district to customize or mimic documents you are already using and utilize them online so those with access can view the information electronically through Student Management and Educator Access Plus.

Once a form is added and configured through Special Education Forms, the Evaluation Forms tab and the IEP Forms tab appear on the Special Education Student Profile and Entry by Student screens.

To learn more about Evaluation and IEP Forms, see "Using Special Education Forms" (page 59).

To add an Evaluation or IEP form to a student:

1. Go to Student Management\Student Services\SE\PR.

2. Do one of the following:

   ▪ If you are adding an IEP form, click the IEP Forms tab.

   ▪ If you are adding an evaluation form, click the Evaluation Forms tab.

3. In the list of the student's IEPs in the middle of the screen, select the student's IEP to which you want to add the form.

4. In the list at the bottom of the screen, select the form you want to add, and click Add.

5. Based on the form content, student demographic data that has been set up through merge fields appears. Configure additional information as needed.

6. In the Form Status box, select a form status. The form status displays the progression of the form:

   ▪ Work in Progress: Changes will still be made to the form by the creator or another person(s).

   ▪ Waiting for Approval: Form is completed and can be reviewed.

   ▪ Approved: Form has been reviewed and no additional changes are needed. Only users with level 5 access can make changes.

   ▪ Locked: Form is completed and no further changes can be made. The form is available in Educator Access Plus for those with the necessary security level.

Tip	If you are not using the Approval process, when the form is complete, change the Form status to Locked.

Note	The Design Form button allows you to modify the form on a student-by-student basis. However, this is not recommended because multiple versions of the form will then be attached to students. If a change to the form is needed, make the change to the form itself through Form Setup (Web Student Management\Student Services\FO\FS).

7. Click Save and Close.

Adding Communications Information

Districts can use the Contacts tab to track communications for a student between guardians and physicians, as well as other districts. This area allows you to enter and log as many communications regarding the student's Special Education Record as needed. You can also note the contact method, such as Email, Phone or Letter.

To add guardian communications information:

1. Go to Student Management\Student Services\SE\PR.

2. Click the Contacts tab.

3. Click Add in the Contacts area.

4. Configure the Contact Maintenance screen (Figure 18). Table 9 describes the options on this screen.

5. Click Save.

Figure 18 - Contact Maintenance screen

Option	Description
Date of Contact	Date the contact was made. Defaults to today's date but can be changed.
Time of Contact	Time the contact was made. Defaults to the current time but can be changed.
Type of Contact	Contact method. Preset values are Email, IEP Form, In Person, Invitation, Letter, Notice, Other, Parent/Teacher Conference, and Phone.
Staff	Namekey of the staff member who made the contact.
Comment	Free-form comment box that allows you to enter additional information regarding the contact.

Table 9 - Options on the Contact Maintenance screen

Adding a Team Group and Team Members

Teams are the group of individuals who meet to discuss and direct the student's success. Team Members can include the student, the student's guardians, counselors, teachers, and Special Education staff members.

The Team Members tab has three areas for maintaining Team Member information: Team Groups, Team Members, and Names Not in Name Table.

A student can have several Team Groups assigned to their record, and each Team Group can be comprised of different team members. You must add a Team Group before adding Team Members.

To add a Team Group and Team Members:

1. Go to Student Management\Student Services\SE\PR.

2. Click the Team Members tab.

3. To the right of the Team Groups list, click Add (Figure 19).

4. In the Team Description box, type a description, and select the Default Team check box if appropriate.

	Caution	When you select the Default Team option, you are indicating that **all** students added to the Special Education module will have this team group added to their record.

5. Click Save.

6. Configure the Team Member Maintenance screen (Figure 20). Table 10 describes the options on this screen.

7. Do one of the following:

   ▪ To add an additional team member, click Save & Add Next.

Tip	If there are members of the team not listed in the Name Table, click Add next to the Names Not in Name Table area to add additional Team Members.

   ▪ When you have completed adding all members of the team, click Save & Close.

Figure 19 - The Team Members tab with the Add button next to Team Groups

Figure 20 - Team Member Maintenance screen

Option	Description
Team Member	Namekey of the person in the Name Table who will be a member of the Team.
Title	Team member's title. The title is populated from the Staff Record in your district or the relationship from the Guardians and Emergency Contacts Record. You cannot change this information from this screen.
E-mail Address	Staff member's email address, Guardian's email address, or Emergency Contact's email address. The email address is populated from the Name Record in your district. You cannot change this information from this screen.
Team Role	Team Role Code for the Staff Member selected. These codes are defined by the district. To learn more about the Team Role, see "Setting Up Special Education Codes" (page 151).
Qualifications	Evaluation Qualification Code for the Staff Member selected. These codes are defined by the district. To learn more about Qualifications, see "Setting Up Special Education Codes" (page 151).

Table 10 – Options on the Team Member Maintenance screen

Adding Recheck Information

The Recheck tab allows you to set up a date and reason in the Special Education module to review the student's progress or to check on something important. The reason for adding a Recheck Record is unique for each record created. For example, you can add a Recheck Record for a student as a reminder to check on the Evaluation Permission signature from the parent. You can also add a Recheck Record if the student's Special Education file is checked out by a staff member and you want to track who has the file on a specific date. To learn more about reporting this information, see "Recheck Ranges Report" (page 103).

To add Recheck information:

1. Go to Student Management\Student Services\SE\PR.

2. Click the Recheck tab.

3. Click Add.

4. In the Recheck Date box, enter the date when the student's Special Education Record needs to be reviewed.

5. In the Reason for Recheck box, enter a reason for the recheck.

6. Click Save.

Adding Medicaid Information

The Medicaid tab allows you to enter Medicaid eligibility information such as a student's Medicaid Number, and eligibility Start and End Dates. Once you mark the student as eligible, you can add a Medicaid Record to track the start date of the Eligibility timeframe.

To add Medicaid information:

1. Go to Student Management\Student Services\SE\PR.

2. Click the Medicaid tab.

3. Click Edit to the right of Medicaid Number (Figure 21).

4. Select the Medicaid Eligible check box and enter the Medicaid Number in the Medicaid Number box where applicable.

Note	You must select the Medicaid Eligible check box to enter Medicaid Eligibility Date information. The Medicaid Number box is optional.

5. Click Save.

6. Click Add next to the Medicaid Eligibility Dates list (Figure 22).

7. In the Start Date box, enter the date eligibility starts. Leave the End Date with the default value of 12/31/9999.

Note	Once a student is no longer eligible, you can enter an End Date.

8. Click Save.

9. To track yearly billing notifications, do the following:

   a. Click Annual Billing Notification.

   b. Click Add.

   c. Configure the Billing Notification History Maintenance screen, which includes:

   - School Year
   - Notification Sent
   - Time of Contact
   - Type of Contact
   - Staff
   - Comment

   d. Click Save.

   e. Click Back.

10. To track billing consent information, do the following:

   a. Click Billing Consent.

   b. Click Add.

   c. Configure the Billing Consent Maintenance screen, which includes:

   - School Year
   - Request Sent
   - Guardian Response
   - Guardian Action

   d. Click Save.

Figure 21 – The Medicaid tab with the Edit button highlighted. You must select the Medicaid Eligibility check box before you can add Medicaid Eligibility Date information.

Figure 22 - The Medicaid tab with the Medicaid Eligibility check box selected. The Add button next to the Medicaid Eligibility Dates list is highlighted.

Note   Through the Log button on the Medicaid tab, the Medicaid Eligibility Dates Log tracks monthly progress notes for the services provided. Since most districts track Medicaid activity by provider for each session, which includes the time spent with the student, you may not find this option useful.

Adding Individual Health Plans

An Individual Health Plan (IHP) is a form that reports a student's health condition that may impact their learning. IHPs can contain, but are not limited to, the following information: demographic information about the student, the illness or health condition, restrictions, medical care plan, and emergency intervention instructions.

Individual Health Plan Templates (IHPs) must be configured by a person in your district who has access to the Health module. Once IHP templates are created, you can add an IHP for a student in the Special Education module.

You can create and attach an IHP to a student's record in many different areas, such as on the Health tab in Student Profile (Student Management\Students\ ST\PR\Health\IHP) or in the Section 504 module under Entry by Student (Student Management\Student Services\SC\SC). However, no matter which module is used to attach IHPs to the student, you can view all the IHPs that the student has on file from the Special Education module.

When adding an IHP for a student, information is pre-filled into the merge fields included on the IHP template. Merge fields, such as Physician, will not populate for a student if this information does not exist in that field for that student in Skyward's School Management System.

The IHP form also includes blank free-form text boxes when there is no comparable field in Skyward's School Management System to pull data from. Therefore, you must enter information into a text box to complete the IHP.

You can click in any field, including merge fields, to add or edit information. Data you enter onto the IHP form, while stored on the IHP, is not added to the database. For example, if you add data (such as the Physician) to the IHP, it does not populate the Physician field information on the student's Emergency Info tab. To learn how to configure and add an IHP, see the *WSIPC Guide to Health Records.*

To add an Individual Health Plan:

1. Go to Student Management\Student Services\SE\PR.

2. Click the IHP tab.

3. To the right of the IHP area, click Create IHP.

4. In the School Year box, select a year.

5. From the IHP Templates list, select the template you want to create for the student.

Note	If the IHP Template you need is not found in the list, it may need to be configured by your district's Health department.

6. In the Comment box, enter general comments about the student's IHP that may apply and click OK.

Note	The IHP form you selected in step 5 appears with most of the student's demographic information automatically populated (Figure 23). Boxes shaded in yellow indicate you can add or edit data in those boxes by placing your cursor in the box. However, existing demographic information should not be changed on the form.

7. Fill in the areas of the IHP form that apply to the student's particular health concern and the appropriate care plan.

Note	After you enter data in a yellow-shaded box, it turns green. The box your cursor is in currently is shaded purple.

8. Click Save & Close at the top of the IHP form.

Figure 23 - Asthma IHP form where information not housed in Skyward is typed in by user

Adding Custom Forms Information

Custom Forms are used to collect various types of data that your district may need that is not already being collected in the Special Education module. A single Custom Form can include a single data field or multiple data fields. You can have one or more Custom Forms configured. If Custom Forms have been configured and you have been given security to access them, you see them as a sub-tab under the Custom Forms tab (Figure 24). To learn how to configure Custom Forms, see "[Configuring Special Education Custom Forms](#)" *(*page 195).

To add Custom Forms information:

1. Go to Student Management\Student Services\SE\PR.

2. Expand the Custom Forms tab.

3. Click sub tab for the Custom Form you want to fill out (Figure 24).

4. To the right of the Custom Form, click Add (in the example in Figure 24 the Areas Qualif custom form tab is selected).

5. Configure the screen for the Custom Form.

6. Click Save.

Figure 24 –Custom Form indicating which areas in Special Education the student qualifies for

Additional Special Education Options

This section explains the Staff Calendar and Special Education Forms. These options give districts more tracking options and functionality. You can use the Staff Calendar to manage meetings and staff schedules. You can use Special Education Forms to customize the way student information is displayed and reported.

Using the Staff Calendar

The Staff Calendar allows you to view a staff member's calendar of events and to add Meetings (Events) or Blockers to the calendar. Staff members can create a template for themselves or other staff members to display the following:

- IEP Meetings
- RTI Meetings
- Parent Teacher Conferences
- Classes
- Blockers
- Unavailabilities

Using Special Education Forms

You can create Special Education Forms to track and store district documents to utilize student data entered in Skyward's School Management System and combine it with other information that is not already stored or tracked through the software. Forms allow districts to customize or recreate documents they are already using and utilize them online so those with access can view the information electronically.

Understanding the Create Forms Screen

Before creating a Special Education Form, it is important to understand the features on the Templates screen. The Templates screen contains forms created by the district.

To access the Templates screen:

- Go to Student Management\Student Services\SE\FO\TE.

Table 11 describes each feature on the Templates screen.

Figure 25 – Templates screen

Option	Description
Filter Options	Limits which forms appear in the browse. There are 4 filters available: - 3.0 Custom Forms - All Special Education Forms - Custom Special Education Forms - WA Skyward Template Forms
Add	Creates a new custom form template.

Option	Description
Edit	Allows you to modify an existing district created template.
Delete	Permanently deletes a district created template.
Revisions	Tracks each time a Custom Form has been saved and allows staff to review and revert back to a previously saved version of the form.
Clone	Creates a copy of a template, which you can modify without changing the original version.
Print Template	Prints the form with the merged fields.
Print Entry Form	Prints the form with blank merged fields so data can be manually entered into the fields.
Select All Forms to Print	Places a check mark in the Print column next to all templates. Staff members can then select to print the template for all forms or print an entry form.
Unselect all Forms	Clears the check boxes next to all templates.
Export Form	Exports an html file of the form. Districts that wish to share custom forms with other districts export the form and then send the file to the district.
Import Custom Form	Allows a district to import an html form file. Districts that wish to share custom forms with other districts use this to bring the form into their system.

Table 11 – Description of options on the Templates screen

Creating a Special Education Form

Creating a Special Education form involves two steps: creating the form template, and setting up the form. Each step is described below.

Adding a Special Education Form Template

The first step in creating a Special Education form is creating the form template.

To add a Special Education form template:

1. Go to Student Management/Student Services/SE/FO/TE.

2. Click Add.

3. In the Form box, enter the name of the form template (Figure 26).

Note	New Custom Special Education appears in the System box by default.

4. Type the text of the Special Education form in the main body of the screen (Figure 26).

Tip	There are many tools available to help you create a custom form. In the editor menu bar, pause your mouse pointer over a tool to see the name of the tool (Figure 26).

Note	Table 12 describes the Layout, Table, Fields and Defaults menu options in the upper left corner of this screen that you can use to format the form or add information.

5. Click Save & Close.

6. Continue to ".

Figure 26 – Web Form Maintenance screen with the menu bar and editor menu bar highlighted

Menu	**Description of Menu**
Layout	Page layout. The default for the letter is Portrait.
Table	Allows you to clone or delete rows from a table you insert with the Table ⊞ button in the editor menu bar.
Fields	Merge fields you can add to the form. To add a field, click Add next to the field name.
Defaults	Sets size and font defaults for Text Fields or Text Areas.

Table 12 – Options on the Example Employee Letter menu bar

Form Setup

Once you create a Special Education form template, you must add the form to the Form Setup area. From this area, you can also maintain the district forms you have created and create form rules. The Form Setup screen displays all of the templates in the Special Education module.

To add a Special Education form to the Form Setup area:

1. Go to Student Management/Student Services/SE/FO/FS.

2. Click Add.

3. Configure the Add Form screen (Figure 27). Table 13 describes the options on this screen.

4. Click Save.

Note	When an IEP or Evaluation form is added and configured, the Evaluation Forms tab and the IEP Forms tab appear on the Special Education Student Profile and Entry by Student screens.

Figure 27 - Add Form configuration screen

Option	Description
Form Name	Enter the *exact* name of the form that you entered on the Templates screen. If the name is not exact, the software can't pull up the form when adding it to a student's record.
Form Alias	This name can be district defined. The name entered here appears under the Evaluation or IEP Information browse when staff members add the form to a student.
Form Revision	This field is not used in Washington State.
Printing Title	This field is not used in Washington State.
Guardian Form	Click the link and select the template associated with the form you are creating. When adding this form to a student, the software pulls up the template that has been entered in this field.
Student Form	This defaults to the template you selected in the Guardian Form box. If you are sending a different form to the student, select the appropriate template.
Create contact record	When the form is added to a student, the software automatically creates a Contact Record which can be seen in the student's Contacts area.
Allow Multiple Forms	If this is not selected, staff members can only create one form per Evaluation or IEP.
Allow Same Form for Day	This is only enabled when the Allow Multiple Forms option is selected. If selected, staff have the capability to add multiple versions of the form on the same day.
Do Not Allow Form to be Cloned	Prevents form from being cloned.
Form Status	Choose either Current or Historical. Select Historical if the form is no longer going to be used, but staff members want to be able to view the Historical Records. When viewing the Evaluation or IEP Forms browse for a student, a column appears identifying if the form is Current or Historical.
Form Type	Choose either Evaluation or IEP.

Option	Description
IEP Form Type	This option is only enabled if IEP is selected as the Form Type. Choose either Only IEP, Service Plan, or IEP and Service Plan.
Allow Full Access Users to Add, Edit, and Delete form(s) when Evaluation/IEP is locked	Staff with system-wide access or Level 5 Access have full access to form(s) when the Evaluation/IEP is locked.
Allow secured users with Level 3/4 Access to Add/Edit form(s) on locked Evals and IEPs	When Evaluations and IEPs are locked, secured users with Level 3/4 Access can still add and edit forms.
Allow secured users to Edit locked form(s)	When Evaluations and IEPs are locked, secured users with Level 2 Access or higher can still edit existing forms.
Form will remain locked when Edited	This is only enabled when Allow secured users to Edit locked form(s) is selected. When Evaluation and IEP forms are locked and a secured user edits the form, it remains as locked when saved.
Display this Form in Family Access	Displays the form in Family Access.
Display this Form in Teacher Access	Displays the form in Teacher Access.
Required to be viewed for Agreement to IEP	Form can be marked as Required for Teacher Agreement. To learn more about this option, see "Setting Up Teacher Access Display Options" (page 150).
Use Intermediate Screen	Opens the selected screen where you can select or add information before the form opens for the user. Once the user has added the form to a student, an Upd Fld button becomes available allowing the user to modify some of the fields on the intermediate screen.

Option	Description
Use User Defined Security	Allows the district to pick and choose which users can access this form. If selected, staff members must go into the security area and set up the security options to be able to use the form.
Form Revision	This field allows districts to control when they will begin to use a new template for either a Skyward template form or district-defined form.

Table 13 - Form Setup Configuration screen

Selecting Forms for District Use and Setting the Display Order

Once you create Special Education forms, you can determine which forms your district will use and the order in which Evaluation or IEP forms appear on the Special Education Student Profile and Entry By Student screens.

To select forms for district use and set the display order:

1. Go to Student/Student Services/SE/FO/DO.

2. Select the Selected check box for each form that Special Education staff will be allowed to create .

3. To determine the order in which the forms appear, click the ⊕ icon in the Move column and drag the form to the desired location.

4. Click Save.

Managing Special Education Students

Once you add students to the Special Education module, you can manage their information and track their records through the Special Education process year after year. A student's IEP is reviewed after one year. After three years, a Reevaluation is required to determine if the student still qualifies for Special Education services, and if the IEP needs to be modified. Minimum maintenance of the Special Education Records is required to ensure accurate Federal/State Reporting. Reevaluations and IEP Reviews are added as new records so that previous records are preserved for historical reporting purposes.

This section describes the maintenance of the Special Education Records to keep them up to date for reporting purposes.

Selecting an Existing Special Education Student

You can select a Special Education student's record three different ways using the Special Education Student Profile (Student Management\Student Services\SE\PR):

- Type the student's Namekey, or a portion of the Namekey, in the Student box (Figure 28).

- Click the Student link to access the Special Education Student List (Figure 29).

- Use the forward and back arrows to move through the student list (Figure 30).

You can also view a student's picture, if available, by pausing your mouse pointer over the student's Namekey in the header area of Student Profile.

Figure 28 – Find an existing Special Education student by typing first few characters of last name in the Student box

Figure 29 – Find an existing Special Education student by clicking the Student link which brings up the Special Education Student List screen for you to select the student

Figure 30 – Use the arrows to find an existing Special Education student

Setting Special Education Student Ranges

The list of students available for selection is determined by the ranges set. Use the Ranges link to narrow the range of students available for selection. This is helpful if you only want to work with a subset of students, such as students who are Active in basic education.

To set Special Education student ranges:

1. Go to Student Management\Student Services\SE\PR.

2. In the header area, click Ranges (Figure 31).

3. Configure the Ranges screen.

> **Note**   To configure the ranges for students who are Active in basic education, click the arrow to the right of Current Year Status and select Active.

4. Click Save.

Once the range is set, only the students who fall within the range are available for selection.

Figure 31 - Click on Ranges to narrow down the range of Special Education students available for selection

Maintaining Referral Information

You may need to add or edit a Special Education student's Referral information for an existing Evaluation.

To maintain Referral information:

1. Go to Student Management\Student Services\SE\PR.

2. Select the Evaluation related to the Referral you want to maintain from the list of Evaluations.

3. Click the Referral tab.

4. Do one of the following:

    ▪ Click Add to add the Referral information for the existing Evaluation.

    ▪ Click Edit to update the Referral information for the existing Evaluation.

5. Configure the Referral Information area. To learn more about Referral information, see "Adding Referral Information" (page 16).

6. Click Save.

Maintaining Evaluation Information

After students have been added to the Special Education module, their records must be maintained. The Evaluation area is intended to provide the history of all Evaluations completed for the student in your district and whether or not they qualify for Special Education services. Whenever an action related to a student's Evaluation occurs, you document the event.

Adding a Reevaluation

When a student has a Reevaluation in your district, you add a new Evaluation Record in the Special Education module. Each Evaluation is valid for a maximum of three years, and each Evaluation must be a separate record to document the information about each new Evaluation. Each new Evaluation Record added to the student resets the three year timeline from the date in the Evaluation Completed box.

If the district and guardian agree to a Waiver of Reevaluation, this waiver is added as a new and separate Evaluation Record and marked with the appropriate Evaluation Type Code used for waivers. The timeline is reset for three years from the time the Waiver is agreed to.

To add a Reevaluation:

1. Go to Student Management\Student Services\SE\PR.

2. Click the Evaluation Info tab.

3. To the right of the Evaluations list, click Add (Figure 32).

4. Configure the Evaluation Information area. The options for adding a Reevaluation are the same as those for adding an Initial Evaluation. To learn more about the options on this area, see "Adding Evaluation Information" (page 20).

5. Click Save.

Figure 32 – To add a Reevaluation Record, click Add to the right of the Evaluations list

Editing an Existing Evaluation

There may be occasions when you need to change or add information to an existing Evaluation. For example, you may need to change the student's Case Manager, provide a reason for exceeding the 35-day timeframe, or add comments about the Evaluation.

Note	Do not edit an existing Evaluation to show that a new Evaluation has been completed. Each Evaluation requires a new and separate record.

To edit an existing Evaluation:

1. Go to Student Management\Student Services\SE\PR.

2. Click the Evaluation Info tab.

3. Select the Evaluation Record you want to edit from the list of Evaluations.

4. To the right of the Evaluations list, click Edit.

5. Configure the Evaluation Information area. The options for editing an Evaluation are the same as those for adding an Initial Evaluation. To learn more about these options, see "Adding Evaluation Information" (page 20).

6. Click Save.

Deleting an Evaluation

When deleting an Evaluation Record, all IEP and Placement information attached to that Evaluation are also deleted. The Delete option should only be used when the Evaluation Record was created in error. For example, if the Evaluation information was entered on an incorrect student, deleting the Evaluation is acceptable.

Note	If you delete an Evaluation, and it is the only Evaluation Record associated with a student, that student is removed from the Special Education Module.

To delete an Evaluation:

1. Go to Student Management\Student Services\SE\PR.

2. Click the Evaluation Info tab.

3. Select the Evaluation Record you want to delete.

4. To the right of the Evaluations list, click Delete. The following message appears:

   "WARNING: You are about to PERMANENTLY delete ALL of this student's Special Education Records attached to this evaluation. This includes the forms as well as any IEP information.

   Are you sure you wish to delete the [date] Evaluation?"

5. Click OK to complete the delete process.

Additional Special Education Header Functions

There are several options located in the Special Education Header that refer to global Special Education information and are not restricted to the student's Evaluation. These options include printing Forms, using Student Notes, and using Attachments.

Using Print Forms

This option was designed for another state and is *not* used in Washington State.

Using Student Notes

This option provides an area to enter additional information in text format about the Special Education student for teachers to see in Educator Access Plus. For example, you can use Student Notes to give teachers more information about accommodations to provide for the student in their General Education classes.

Student Notes is included with the student's primary disability if your district configures the Display Primary Disability/Handicap Alert Bar in Gradebook option. To learn how to configure this option, see the *WSIPC Guide to Secondary Gradebook Configuration* or the *WSIPC Guide to Standards Gradebook Configuration.*

Note	Information entered in the Student Notes area appears for teachers in Educator Access Plus under My Gradebook and My Classes when they click the blue Special Education alert bar next to the student's name. Notes are also available to teachers in Educator Access Plus under My Students with Disabilities when the student's record is expanded.

Using Attachments

The Attachment option allows you to attach any document that may be pertinent to the Special Education student's education or provides supplemental information for their records. For example, you may want to attach a copy of the signed Permission to Evaluate Form or a doctor's referral.

To use attachments:

1. Go to Student Management\Student Services\SE\PR.

2. Select the student you're adding an attachment for.

3. In the Special Education Header, click Attachments.

4. The Attachments screen appears, click Add File.

5. Configure the Special Education Attachments screen (Figure 33). Table 14 describes the options on this screen.

6. Click Browse and navigate to the document you want to attach to the student's Special Education Record.

7. Click Save.

Figure 33 – Special Education Attachments screen

Option	Description
Type	Type of Special Education attachment. Default is Attachments [Special Education]. Types can be defined by the district by clicking the Type link and clicking Add.
Entered Date	Date the attachment was added. Display only.
Entered Time	Time the attachment was added. Display only.
Entered by	Name of user adding the attachment. Display only.
Description	Free-form text box for you to enter a description regarding the attachment.
Attached File	Name and path of the document that is attached.

Table 14 - Options on the Special Education Attachments screen

Maintaining Individual Education Plan (IEP) and Placement Information

IEPs are attached to a particular Evaluation. For every Evaluation, there can be one or more IEPs written based on the findings in that Evaluation. In the Special Education module, all IEP Records must be attached to the appropriate Evaluation Record. The Evaluation you currently have selected is highlighted in the Evaluations list section of the Special Education Header.

The example in Figure 34 shows a student with multiple Evaluation Records in the Evaluations list (outlined in red). The Evaluation with a start date of 12/09/2014 is selected. This indicates that you want to maintain IEP information which is attached to this Evaluation Record. When you expand the IEP Information tab on the left, it lists all of the IEP Records that are attached to selected Evaluation.

Figure 34 – Selecting an Evaluation Record to maintain the attached IEP information

Adding a Review IEP

The span of any IEP cannot be more than one year minus one day. A student's IEP must be reviewed and a new one created prior to the End IEP date. In the Special Education module, two IEP Records cannot have overlapping Start and End Dates. When you add a review IEP that starts prior to the end of the previous IEP, the End IEP date of the previous IEP automatically adjusts to make the two records continuous.

To add a review IEP:

1. Go to Student Management\Student Services\SE\PR.

2. Select the Special Education student you want to work with.

3. In the Evaluations list, verify that the student's most current Evaluation Record is selected.

4. Click the IEP Information tab.

5. Select the student's current IEP Record from the sub-tabs displayed.

6. To the right of the IEP Information area, click Add.

7. Configure the Individual Education Plan Maintenance screen. The options on this screen are the same as those used for adding an IEP. To learn more about these options, see "Adding IEP Information" (page 29).

8. Click Save.

Editing IEP Information

There are times when you may need to edit an IEP to clear the Work in Progress check box, update the IEP Manager, or to note that Extended School Year services are required.

To edit IEP information:

1. Go to Student Management\Student Services\SE\PR.

2. Select the Special Education student you want to work with.

3. In the Evaluations list, verify that the student's most current Evaluation Record is selected.

4. Click the IEP Information tab.

5. Select the student's IEP to be edited from the sub-tabs beneath the IEP Information tab.

6. To the right of the IEP Information area, click Edit.

7. Make changes on the Individual Education Plan Maintenance screen. To learn more about the options on this screen, see "Adding IEP Information" (page 29).

8. Click Save.

> ⚠️ **Caution**   Do not edit an existing IEP to change the LRE for a student's IEP. Whenever a change of LRE occurs, add a new IEP to the appropriate Evaluation Record. Adding a new IEP documents the effective date range for the new LRE and preserves the previous LRE with its effective date range. Only edit an existing IEP to change the LRE when the LRE is incorrect for the IEP.

Cloning an IEP

You can clone an IEP if the majority of data from the student's previous IEP matches the data in the student's new IEP. Cloning an IEP copies the same information from the previous IEP into the new IEP, including the LRE Code and IEP Manager. There are also options to clone placement information and special transportation needs. The clone process also adjusts the Start IEP and End IEP dates accordingly. However, you must verify the IEP information and make the necessary changes.

The Clone button on the IEP Information screen serves two purposes:

- Cloning an Existing IEP to create a new IEP
- Cloning to Split an IEP between Two Evaluations

Cloning an Existing IEP to create a new IEP

If the majority of data in the student's previous IEP matches the data in the student's new IEP, use the Clone feature instead of manually entering all the data for the new IEP to save time.

1. Go to Student Management\Student Services\SE\PR.

2. Select the Special Education student you want to work with.

3. In the Evaluations list, verify that the student's most current Evaluation Record is selected.

4. Select the IEP Information tab.

5. From the IEP sub-tabs, select the student's IEP to be cloned.

6. To the right of the IEP Information area, click Clone.

7. In the IEP Information area of the Individualized Education Plan Maintenance screen, verify that the Start IEP, End IEP, IEP Manager, and Least Restrictive Environment values are correct (Figure 35).

8. If some or all of the Placements are the same for the new IEP, in the Cloning Options area select the Clone Placements check box (indicated by the #1 in Figure 36).

9. Click the Placements link (indicated by the #2 in Figure 36) to view the list of Placements from the student's current IEP available to clone to new IEP.

10. On the Student Placements Selection screen, select the check box in the Select column next to the Placement Records you want to clone (Figure 37).

11. Click Save.

12. In the Cloning Options area, select Clone Special Transportation Needs if the transportation needs are the same for the new IEP.

13. On the Transportation Special Needs Selection screen, select the check box in the Select column next to the transportation needs records you want to clone.

14. Click Save.

15. Verify the data on the Individualized Education Plan Maintenance screen, and click Save again.

Figure 35 – Individual Education Plan Maintenance screen appears when cloning an IEP, verify data in IEP Information area is correct

Figure 36 – Individual Education Plan Maintenance Clone options

Figure 37 - Student Placement Selection screen where you select which Placements to clone to new IEP

Cloning to Split an IEP between Two Evaluations

If a student's Evaluation has expired, but his or her current IEP is still valid, you can use the Clone feature to split the student's current IEP between the expired Evaluation and the new Evaluation. You must keep a portion of the IEP on the student's expired Evaluation Record and then attach the other portion to the newly entered Evaluation Record.

To split an IEP between two Evaluations:

1. Go to Student Management\Student Services\SE\PR.

2. Select the Special Education student you want to work with.

3. In the Evaluations list, verify that the student's new Evaluation Record has been added. The IEP to clone will still be attached to the expired Evaluation.

4. In the Evaluations list, select the student's *expired* Evaluation (indicated by the #1 in Figure 38).

5. Select the IEP Information tab.

6. From the IEP sub-tabs, select the student's IEP to be cloned (indicated by the #2 in Figure 38).

7. To the right of the IEP Information area, click Clone (indicated by the #3 in Figure 38).

8. In the IEP Information area of the Individualized Education Plan Maintenance screen, update the Start IEP field with the new Evaluation Start date and the End IEP field with the original IEP end date (indicated by the #1 in Figure 39). Verify that the IEP Manager and Least Restrictive Environment values are correct.

9. If some or all of the Placements are the same for the new IEP, in the Cloning Options area select the Clone Placements check box (indicated by the #2 in Figure 39).

10. Click the Placements link to view the list of placements from the student's current IEP available to clone to new IEP (indicated by the #3 in Figure 39).

11. On the Student Placements Selection screen, select the check box in the Select column next to the Placement Records you want to clone (indicated by the #1 in Figure 40). The Begin Date and End Date of the Placements (indicated by the #2 in Figure 40) reflect the dates entered in Step 8.

12. Click Save.

13. In the Cloning Options area, select the Clone Special Transportation Needs if the transportation needs are the same for the new IEP.

14. On the Transportation Special Needs Selection screen, select the check box in the Select column next to the Transportation Needs Records you want to clone.

15. Click Save.

16. Verify that the data on the Individualized Education Plan Maintenance screen is correct, and click Save again.
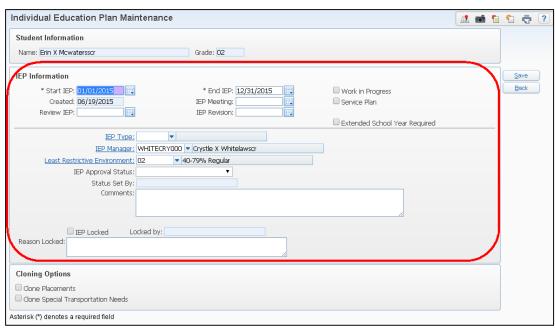
Figure 38 – Select the Expired Evaluation to Clone IEP

Figure 39- Update IEP Dates and Clone Placements

Figure 40- Select Placements

Deleting an IEP

When deleting an IEP Record, all placement information attached to that IEP is also deleted. Use the Delete option only when the IEP Record has been created in error. For example, if you enter IEP information for the wrong student, you can delete the IEP entered in error.

Note	If the IEP information is for the correct student but is attached to the incorrect Evaluation, you can use the Transfer option. This moves the IEP and all the associated Placements to the correct Evaluation Record. To learn more about transferring an IEP, see "Transferring an IEP" (page 87).

To delete an IEP:

1. Go to Student Management\Student Services\SE\PR.

2. Select the Special Education Student Record you want to work with.

3. In the Evaluations list, verify that the student's correct Evaluation Record is selected.

4. Select the IEP Information tab.

5. Select the student's IEP to be deleted.

6. To the right of the IEP Information area, click Delete. The following message appears:

   "WARNING: you are about to delete this IEP as well as any IEP forms created. Are you sure you wish to delete the 09/04/2015 - 09/03/2016 [date] IEP?"

7. Click OK to delete the IEP.

	Caution	If you delete an IEP Record, all other Special Education Records attached to that IEP are also deleted. This includes the Placement Records for the IEP.

Locking an IEP

You can lock an IEP Record to prevent others from making changes to it. Only the person who locked the record, or someone who is a system-wide user, can unlock the record to change it.

If you need to unlock an IEP that has been locked by someone else, you can use the Lock/Unlock Evaluations and IEPs Utility. To learn more about this utility, see "Running Special Education Utilities" (page 110).

Transferring an IEP

The Transfer IEP option allows you to move an IEP and all information associated with that IEP from one Evaluation Record to another Evaluation Record. You can use this option when an IEP is entered and connected to the incorrect Evaluation Record.

Note	The Transfer IEP button does not replace the Clone button, which allows you to clone and create a new IEP or to split an IEP between two Evaluation Records.

To transfer an IEP:

1. Go to Student Management\Student Services\SE\PR.

2. Select the Special Education student you want to work with.

Note	You must know the Evaluation Start date of the Evaluation you are transferring the student's IEP to before you begin the transfer process.

3. In the Evaluations list, select the student's Evaluation that is attached to the IEP you want to transfer.

4. Select the IEP Information tab.

5. Select the IEP that you want to transfer.

6. To the right of the IEP Information area, click Transfer IEP.

7. On the Transfer IEP screen (Figure 41), select a date by clicking the arrow next to Transfer existing IEP from Evaluation starting on [mm/dd/yyyy] to Evaluation stating on mm/dd/yyyy. Table 15 explains the options available on the Transfer IEP screen.

Note	The date you select here must correspond to the Evaluation Start date on an Evaluation Record.

8. Click Transfer.

Figure 41 – Transfer IEP screen where an entire IEP is moved from one Evaluation to another Evaluation

Option	Description
Student Summary	Information about the student and the IEP that will be transferred.
Transfer existing IEP from Evaluation starting on mm/dd/yyyy to Evaluation starting on	Evaluation Start Date for the Evaluation Record that the IEP should be attached to. Select the Evaluation that the IEP should be connected to from the available Evaluations listed.
Old Evaluation	Evaluation information and disability for the Evaluation Record that the IEP is currently connected to.
New Evaluation	Evaluation information and disability for the Evaluation Record selected to transfer the IEP to.

Table 15 – Options on the Transfer IEP screen

Editing a Placement

There may be times when you need to change information related to a student's placement. For example, you may need to change the student's Primary Placement, dismiss a placement, or add information.

Students can be dismissed from services without a new IEP when they change service providers. To track the timeframe in which the student received a specific service, you dismiss the placement instead of deleting the service from the student's IEP. This allows the data to stay intact for historical references.

To edit a Placement:

1. Go to Student Management\Student Services\SE\PR.

2. Click the IEP Information tab.

3. Select the IEP Record where Placements are attached.

4. In the upper right corner of the IEP Information area, click the Placements button next to Scroll To.

5. Select the Placement to be changed and click Edit to the right of the Placements in this IEP list.

6. Update the Placement Maintenance screen. To learn more about the options on this screen, see "Adding Placement Information" (page 33).

7. Click Save.

| Note | If you dismiss the student from a placement that has a matching Placement Record for the next year, delete the entire placement for the next year. |

Deleting a Placement

Most students have two placements for a single service, one for each year the IEP spans. When the student changes placements during the school year, you need to consider the placements for both school years. You can delete the Placement Record for the following year if the Start date for the Placement Record has not yet occurred. You can edit the remaining placement and dismiss the student from the placement that they are assigned to for the remainder of the year.

To delete a Placement:

1. Go to Student Management\Student Services\SE\PR.

2. Click the IEP Information tab.

3. Select the IEP Record where Placements are attached.

4. In the upper right corner of the IEP Information area, click the Placements button next to Scroll To.

5. Select the Placement to be deleted and click Delete next to the Placements in this IEP list. A message asks you to confirm the deletion of the selected Placement Record.

6. Click OK.

Exiting a Student from Special Education

Students who no longer receive Special Education services must be exited from the Special Education module. When a student is exited from the Special Education module, the Exit Date you enter automatically populates the IEP End Date box to stop the current IEP. The placements associated with the IEP also have the End Date updated with the Exit Date entered. The Special Education Student check box on the student's Evaluation is automatically cleared. All of the student's other Special Education information remains.

To exit a student from Special Education:

1. Go to Student Management\Student Services\SE\PR.

2. Click the State Reporting tab.

3. Click Edit in the State Reporting area.

4. Configure the Exit Information area (Figure 42) on the State Reporting Maintenance screen. Table 16 describes the options in this area.

5. Click Save.

Figure 42 – Exit Information area on the State Reporting Maintenance screen

Option	Description
Exit Date	Date the student exits the Special Education program.
Exit Reason	Reason the student is exiting the Special Education program. Exit Reason Codes are defined by the district. To learn more about using Exit Reason Codes, see "Exit Reason Codes" (page 156).
State Rpt Code	Description of the State Report Code attached to the Exit Reason Code selected above. Not all Exit Reason Codes have a State Report Code, so this may be blank. This field cannot be changed on the student's Exit Record. You select the State Report Code when defining the Exit Reason Codes. To learn more about using Exit Reason Codes, see "Exit Reason Codes" (page 156).
Comments	Text box for entering comments about the student's exit from Special Education.

Table 16 – Exit Information options

Reactivating an Exited Special Education Student

The most common situations that require you to reactivate an exited Special Education student are as follows:

- A Special Education student returns to your district after attending a different district

- A previous Special Education student is referred back to Special Education for evaluation

When a student returns to your district, the student is re-enrolled in an Entity. The registrar can receive an alert message that the student being re-enrolled has an existing Special Education IEP Record (Figure 43). This message is intended to prompt the registrar to notify the Special Education office about the student's return so that the Special Education office can review the student's Special Education Records.

Figure 43 - Returning student with Special Education Records alert

Note	The Suppress Special Ed Enrollment Alerts check box (Product Setup\Skyward Contact Access\DS\CF\WC) must be cleared to enable the alert message (Figure 43) during the re-enrollment process.

A student's Special Education Records may still be valid depending on how long the student attended another district. You must determine whether the student's existing records in the Special Education module are still valid and then update accordingly. If the student's existing records are no longer valid, the student must be re-evaluated.

There may be times when you need to reactivate a Special Education student who had exited Special Education but did not leave your district. For example, a student who no longer qualified for Special Education services may be exited, but is then referred back to Special Education for evaluation for a different disability. Even though a student is referred back to Special Education for a new Evaluation and IEP, the student's previous Special Education Record must be reactivated.

To reactivate an exited Special Education student:

1. Go to Student Management\Student Services\SE\PR.

2. Click the State Reporting tab.

3. Click Edit.

4. Click Remove Exit Date and Reason. The following message appears:

    "This will remove the Exit Date and Reason making the student Active in Special Education. Would you like to continue?"

5. Click Yes to continue. This reactivates the student in the Special Education module again.

6. Click the Evaluation Info tab and review the data on the Evaluation screen by doing one of the following:

    ▪   If the student needs a new Evaluation, click Add to the right of the Evaluations list. To learn more about adding an Evaluation Record, see "Adding Evaluation Information" (page 20).

    ▪   If the existing Evaluation Record is still valid, verify that the Evaluation information is correct. If not, click Edit to the right of the Evaluations list, make the appropriate changes, such as selecting the Special Education Student check box, and click Save.

7. Click Disabilities and do one of the following:

   - If a new Evaluation was added in step 5, click Add and follow the steps in "Adding Disability Information" (page 28) to add the disability for the new Evaluation Record.

   - If the existing Evaluation is valid, verify that the student's Primary Disability is correct. If it is not, follow the steps in "Changing the Primary Disability" (page 97).

8. Click IEP Information and review the data on the IEP and Placements screen:

   - If the placements on the previous IEP are the same services for the new IEP, click Clone on the IEP Information screen and follow the steps in "Cloning an IEP" (page 80).

   - If the placements on the previous IEP are different, click Add on the IEP Information screen and add a new IEP. To learn more about adding a new IEP, see "Adding IEP Information" (page 29).

9. If necessary, make other modifications to the student's Special Education Record.

Viewing Special Education Exit History

Changes made to Exit Information on the State Reporting tab are recorded under the History button. For example, when a student is exited out of Special Education, or a previously enrolled Special Education student returns or is reactivated within the district, a State Reporting Information Transaction is created (Figure 44).

Note	The SE Exit Transactions option also records changes to the Exit Date and Exit Reason. Users can edit historical transactions and also add any additional records that may be needed.

Figure 44 – State Reporting Information Transactions

Changing the Primary Disability

There are times when you may need to change the student's Primary Disability. Having the correct Primary Disability is important for accurate State Reporting.

To change the Primary Disability:

1. Go to Student Management\Student Services\SE\PR.

2. Click the Disabilities tab.

3. Select the current Primary Disability Record.

4. Click Edit in the Disabilities area of the screen.

5. Clear the Primary Disability check box on the Disability Maintenance screen.

6. Click Save.

7. Click Add in the Disabilities area of the screen.

8. In the Disability box, Select a Disability Code.

9. Select the Primary Disability check box.

10. Click Save.

Running Special Education Reports

The Special Education module offers many reports to help you manage Special Education student data. While some reports are standardized, others offer a variety of ranges you can customize to ensure the reports contain the data you need. You can define your own templates for each of the reports to give you the students and data you need on the report. Once these templates are defined and saved, you can run the report again using the same range settings.

To run Special Education reports:

- Go to Student Management\Student Services\SE\RE.

This section describes each report and how it might be used.

Case Due Report

The Case Due Report tracks cases that are approaching the timeline for completion. The report indicates the number of days until the case is due and also reports whether a case is past due. The Case Due Date is shown along with the dates of the last Evaluation, Last IEP Meeting, beginning and ending IEP dates, and the Start Date of the Evaluation. You can also include Work in Progress (WIP) Evaluations and IEPs on this report.

Evaluation Completions Due Report

The Evaluation Completions Due Report displays students who are approaching the timeline to have their next Evaluation completed.

IEPs Expiring Report

The IEPs Expiring Report tracks students whose IEP has expired or will expire during the specified date range. The report shows whether the Evaluation Record linked to the IEP has expired or when the next Evaluation is due to begin. You can run this report for a specific date range so that it doesn't include all students.

You can run this report on a monthly basis to identify students with IEPs expiring in the upcoming month. This allows the necessary time to notify the providers to schedule or start a new IEP. You can run the report for a specific Case or IEP Manager. You can also include Work In Progress (WIP) Evaluations and IEPs on this report.

IEP Review Date Report

The IEP Review Date Report displays students whose IEP Review Date is past due. You can include Work In Progress (WIP) Evaluations and IEPs on this report.

Three Year Evaluations Due Report

The Three Year Evaluations Due Report displays students with Reevaluations approaching the three-year mark and students with Reevaluations past due. You can also include Work In Progress (WIP) Evaluations on this report.

You can run this report on a monthly basis to identify students with Evaluations expiring in the upcoming months. This allows the necessary time to notify the Case Managers that a new evaluation needs to be started. You can run the report for a specific Case or IEP Manager.

Case Manager List Report

The Case Manager List Report displays information on students such as Evaluation Date, Evaluation Status, Evaluation Type, Case Due date, and Placement Consent. The report is page separated by Case Manager so you can disseminate to individual managers.

You can include Work in Progress (WIP) Evaluations and IEPs on this report and run the report for specific Evaluation Types (Evaluation, Re-Evaluation, and Transfer) and Evaluation Status Types.

Class List by Range or by Individual Teacher Report

The Class List by Range or by Individual Teacher Report provides placement information for the staff members who provide the instruction. It also lists the students receiving the service. You can generate the report in one of two ways: On or Before Effective Date, or As of Effective Date.

Using the On or Before Effective Date selection lists the students who were placed (for the current school year) in the program or related service on or before the date you enter as the Effective Date. This option provides a list of students with expired IEPs, students who have been dismissed, and students with current Placements.

Using the As of Effective Date selection lists *all* students placed on or before the date you enter as the Effective Date. This option provides a list of students with current IEPs as of the date entered as the Effective Date.

You can run the report in a Brief or Expanded format. Selecting Expanded Class List Type includes all services the students in the Placement are receiving. This allows the provider to see what other services the student is in, along with the staff members providing the other services.

You can also use this report to find any student without Placements for their current IEP.

Contact Report

The Contact Report displays Contact Records for the student and can include the Contact Date, Contact Person, Contact Type, and Comments associated with the Contact Record.

Eval – Re-Eval Count Report

The Eval – Re-Eval Count Report displays Evaluation count information for each Case Manager. The report includes the number of Initial Evaluations, number of students who were determined to need Special Education based on their Initial Evaluation, and the number of Reevaluations for the Case Manager. The number of students who were found to still need Special Education services based on their Reevaluation are included in the Continued Spec Ed column count.

If you select the Print Student Names option on the report, the following additional information is included on the report: Student Name, Eval Type and Approve/Deny. The Approve/Deny column indicates the Reporting Status linked to the Status of Evaluation. Statuses that appear in the Approve/Deny column include the following:

- **Pending** - Reporting Status of OPEN
- **Approved** - Reporting Status of Closed: SPED
- **Denied** - Reporting Status of Closed: Other or Closed: Not SPED
- **Error** - Reporting Status of Closed: SPED and no disability found

Evaluation Summary Report

The Evaluation Summary Report displays both demographic and Special Education information for a student. You can print this report and place it in the student's Special Education file upon their exit from Special Education to use as a quick reference when needed.

Exit Count Report

The Exit Count Report displays how many students have exited from the Special Education module within a given timeframe, and lists them by Exit Code and Exit Date. You can choose to include Student Details, Primary Disability, and LRE Code on the report.

Form Status Report

The Form Status Report indicates the status of Special Education forms for Evaluations and IEPs.

This report was designed for another state and is not used in Washington State.

Forms Viewed/Unviewed Tracking Report

The Forms View/Unviewed Tracking Report is only available at an Entity level. This report provides a list of families or teachers who have viewed the Special Education forms. It also lists those forms that have not been viewed by families or teachers. This report was designed for another state and is not used in Washington State.

IEP Gap Report

The IEP Gap Report identifies students who have a gap greater than one day between the End Date of one IEP and the Begin Date of another IEP. Verifying the data on this report helps ensure that no data entry errors were made when entering IEP information. The report displays the Student Name, Previous IEP Begin and End Dates, Current/WIP IEP Begin and End Dates, and the Lapse Days. You can sort this report by IEP Manager to hand out for review.

IEP Managers List Report

The IEP Managers List Report generates a list of students for each IEP Manager. You can run the report in the following formats based on Managers List Type option:

- **Brief** - The report includes the student's Primary Program/Service, Primary Disability, IEP End Date, Next Eval Date, and Last Meeting Date.

- **Brief/All Services/Programs** - The report includes all fields from the Brief format, plus all the Placements for the student.

- **Expanded** - The report includes all fields from the Brief/All Services/Programs formats, plus the student's Special Education Status, School, Other ID, Assessment Date, Next Assessment Date, IEP Begin Date, and the student's Exit Date.

All three types of this report show whether the student's IEP has expired, if a new IEP exists for the student, if the student has exited from Special Education, and whether the Evaluation or IEP is marked as WIP.

Both the Brief and Expanded formats of this report provide a list of all students who do not have an IEP Manager assigned, as well as a list of students who do not have an IEP (don't have an IEP Manager assigned).

Medicaid Monthly Log Report

The Medicaid Monthly Log Report gives a list of all the detail activity entered by the provider for services they provided to a student. Each student has a complete list of all providers' activity for the month selected by date. This report was designed to meet specific state requirements for another state and is not typically used in Washington State.

Medicaid Student List

The Medicaid Student List displays students who have a Medicaid Record on their Special Education Record. Details include the student's Medicaid number, Medicaid Start and End Dates, and whether or not the Medicaid Record is active.

Print Forms Report

The Print Forms Report allows you to print selected forms for a group of selected students. This report was designed for another state and is not used in Washington State.

Print Labels Report

The Print Labels Report allows you to print mailing labels for Special Education students based on the ranges defined in the parameters.

Recheck Ranges Report

The Recheck Ranges Report displays students who have had a Recheck Record added to their Special Education Record. It also displays any added recheck comments. You can include Work In Progress (WIP) Evaluations or IEPs on this report.

If you use the Recheck feature, you can use this report to provide a list of those students who have a Recheck Record within a specific date range.

To learn more about using the Recheck feature, see "Maintaining Other Special Education Information" (page 33).

Special Transportation Needs List

The Special Transportation Needs List provides a list of students and their Special Transportation Needs information. You can run this report for a specific IEP date range. You can also include Work In Progress (WIP) Evaluations or IEPs on this report.

Federal Special Education Suspension-Expulsion Report

The Federal Suspension/Expulsion Report is only available to users with district access. The report must be run from Entity 000.

Federal and state Special Education regulations require school districts to provide information regarding the numbers and types of Special Education students who were suspended or expelled during the school year. These reports cover the entire school year and include Special Education students and non-Special Education students, ages 3 to 21. Data is collected at the end of each school year.

The Federal Special Education Suspension-Expulsion Report counts Special Education students who meet any of the following conditions for the school year reported:

- Any Special Education student removed to an interim alternative educational setting (IEAS) due to drug, weapon, or bodily injury offenses

- Any Special Education student removed to an interim alternative educational setting based on the ruling of an Administrative Law Judge (ALJ)

- Any Special Education student expelled or suspended for any type of offense

Counts are also reported for Special Education and non-Special Education students who were subject to expulsion.

The Summary Report includes separate versions that count Special Education students by disability conditions, by race codes, by gender, and by LEP Status. A detailed version of the report lists all students identified in the Summary Report.

An Exception Report identifies students who would otherwise be included in the Summary and Detail Reports, but do not qualify for one or more reasons.

To learn more about the Federal Special Education Suspension-Expulsion Report, see Web SkyDoc: Web Student Management / Student Services / Special Education / Reports / State Reports.

Initial Evaluation Timeline Report

The Initial Evaluation Timeline Report is only available to users with district access. The report must be run from Entity 000.

This report is a data collection of Special Education students, ages 3 to 21 who were given permission by their parents to have an Initial Evaluation, who have been evaluated, and whose eligibility was determined or not determined within the 35 school days timeline. School districts are to submit this data annually to OSPI as part of State Performance Plan, Indicator 11. The report includes student data from July 1 through June 30 of the reporting year.

To learn more about the Initial Evaluation Timeline Report, see Web SkyDoc: WSIPC / Web Student Management / Student Services / Special Education / Reports / State Reports.

Monthly Special Education Enrollment (P-223H) Report

The Monthly Special Education Enrollment (P-223H) Report is only available to users with district access. The report must be run from Entity 000.

This report is used to determine the number of students who meet the requirements for Special Education funding. All districts are required by OSPI to report this information on a monthly basis. Districts receive state funding based on the enrollment information submitted on the P-223H Report.

The report provides summary counts of the number of actively enrolled students in a school district who are currently receiving Special Education services. Counts for the serving district are grouped by the resident districts in which the students reside.

The P-223H Special Education Monthly Enrollment Report only includes students with a current Evaluation and a current IEP, as stated in the instructions for form SPI P-223H. Students are grouped by handicapping conditions, and their P-223H ages calculated as of August 31 of the current school year except for students turning 3 years of age in the current school year. The SE Enrollment Effective Date entered determines if the student meets these requirements. If the SE Enrollment Effective Date of the report is on or after the student's 3rd birthday, the student is counted as a 3 year old.

The P-223H Special Education Monthly Enrollment Report contains the following sub-reports. When running the P-223H, you can choose to run one or more of the following reports:

- Summary Report
- Exception Report
- Detail Report
- Potential Data Discrepancy Report

There is an option to create an extract file to import into the 1SPI program. When running the P223H Report, you must select the Create Electronic Data File option for the file to be available. If the Create Electronic Data File option is selected on the P223H, the data file will be available to view, save, and/or edit under the View/Save Local P223H Extract File Report option.

To learn more about the Monthly Special Education Enrollment (P223H) Report, see Web SkyDoc: WSIPC / Web Student Management / Student Services / Special Education / Reports / State Reports.

View/Save Local P223H Extract Files

If the Create Electronic Data File option is selected on the P223H, the data file is available to view, save, and edit with this report option.

Monthly Case Load Report

The Monthly Case Load Report is available to a user with access to a single Entity or a user with district access.

The Monthly Case Load Report contains the necessary information to verify students receiving services. It provides the ability for the service provider to monitor the students they serve.

Services or programs included in the report are determined by a user-defined effective date. Report ranges provide the ability to select services/programs, locations, and teachers. The report has options to include a student's other services/programs, dismissed placements, and to report students with expired or WIP IEPs.

To learn more about the Monthly Case Load Report, see Web SkyDoc: WSIPC / Web Student Management / Student Services / Special Education / Reports / State Reports.

Transition from Part-C to Part-B Report

The Transition from Part-C to Part-B Report is only available to users with district access.

This report is a data collection of Special Education students, two to three years of age, who are being served under IDEA Part-C, and were given a Part-B Initial Evaluation as of their third birthday during the reporting period. School districts are to submit the report annually to OSPI as part of State Performance Plan, Indicator 11. The report includes student data from July 1 through June 30 of the reporting year. This is a subset of the Initial Evaluation Timeline data set.

To learn more about the Transition from Part-C to Part-B Report, see Web SkyDoc: WSIPC / Web Student Management / Student Services / Special Education / Reports / State Reports.

Student Alphakey List

The Student Namekey List provides a list of students with Special Education Records in the Special Education module. You can use the ranges and options available to create a simple list of current Special Education students in your district. Information about each student includes both demographic and Special Education information.

Student Services List

The Student Services List provides a list of students receiving services in your district. Students who do not have placements will not be included in the report. The report includes the Student Name, Primary Disability Code, Services (including Location) and IEP Manager.

Students Attending Other Districts Report

The Student Attending Other District Report tracks students who reside in your district but attend school in another district. The results of the report are generated based on a comparison between the student's Agency Where Enrolled on the student's Evaluation and the District value that is entered on the report parameter screen.

Students From Other Districts Report

The Students From Other Districts Report displays students who reside in another district but have Special Education Records in your district. The results of the report are generated based on a comparison between the student's Resident District on the student's Entry/Withdraw Record and the District value that is entered on the report parameter screen.

Work In Progress Report

The Work in Progress Report shows Evaluations and IEPs that are in WIP status (Work in Progress). If the report is run with a WIP Type of IEP, it includes placement information if it exists on the IEP.

If districts use the process of marking Evaluations and IEPs as WIP, run this report frequently to verify that records which are no longer a Work in Progress, are not still marked as WIP.

Running Special Education Utilities

Special Education utilities help you add, modify, or delete Special Education data for a group of students. These utilities can help you save significant time by allowing you to make changes to many students at once.

To run Special Education utilities:

- Go to Student Management\Student Services\SE Setup\UT.

Audit Placement Dates Utility

The Audit Placement Dates Utility looks at all Placement Records for the selected school year and ensures the dates on the Placement Records fall within the IEP Dates and Service Dates. When processed, the utility adjusts the dates on the Placement Records or removes any record if it should not exist.

Audit Placement Records Utility

The Audit Placement Records Utility processes through all Placement Records for students and verifies that they are correctly marked as a program or a related service. If the Placement Record is set as a program or as a related service, no change is made to the Placement Record.

Clone District Services Utility

The Clone District Services Utility clones services from one year to the next. Because Special Education services are tied to school years, it is necessary to build a set of services for each school year. This utility provides an easy method to clone some or all of your services from one year to the next. If you clone the services, also clone the staff associated with the programs.

Because students' IEPs span multiple school years, your District Services must be cloned for multiple years in the future. When you enter an IEP, make sure the District Services you cloned cover the End Date of that IEP.

This utility allows you to view the District Services to be cloned prior to the changes being processed.

	Caution	You must run the Clone Staff Utility before running the Clone District Services Utility. If you don't, all services are cloned with "Teacher Not Assigned."
	Note	The Clone District Services Utility and the Clone Staff Utility are typically run as part of the Year End process. To learn about the year-end process, see the "Processing Special Education Year End" section in the *WSIPC Guide to Student Year End Processing*.

Clone Staff Utility

The Clone Staff Utility clones Special Education staff from one year to the next. It is necessary to build staff records and assignments for each school year because Special Education staff members are tied to school years. Since staff members are assigned to your District Services, the Staff list must be built for multiple years like the District Services. This utility provides an easy method to clone some or all of your Special Education staff from one year to the next.

The Clone Staff Utility should be run prior to the Clone District Services Utility to ensure your staff are assigned to the district services when they are cloned.

This utility allows you to view the staff to be cloned prior to the changes being processed.

	Note	If you don't run the Clone Staff Utility first, all services are cloned with "Teacher Not Assigned." If this occurs, you can run the Clone Staff Utility again and select the Clone Assignments option. The New Assignment Start and End Dates must match the start and end dates of your District Services for the New School Year.

Note	The Clone District Services Utility and the Clone Staff Utility are typically run as part of the Year End process. To learn about the year-end process, see the "Processing Special Education Year End" section in the *WSIPC Guide to Student Year End Processing*.

Lock/Unlock Evaluations and IEPs Utility

This utility locks or unlocks Evaluations and IEPs based on the options selected in the template. You can lock or unlock individual students or a range of students. The results appear and the utility gives you the option to process or not.

Maintain Student Placements Utility

The Maintain Student Placements Utility allows you to manage Placement Records for groups of students. Placements are the District Services attached to a student's IEP to track the programs and services that they are receiving. You can run this utility at any time during the school year, but is typically used at the start of the school year to move students between programs or to begin and end programs at specific buildings for groups of students moving within the district. When working with this utility, it is necessary to understand how the District Services (Student Management\Student Services\SE Setup\CF\DS) are configured in your district and how they interact with students' Placements.

There are two main functions within the Maintain Student Placements Utility. The first function assists with moving or copying a group of students from one District Service to another District Service. If you use this function, you don't have to individually update each student's Placements. To learn how to use this utility to move or copy a group of students or a range of students, see "" ().

The second function in this utility, Create Next Year's Placement, allows you to create Placement Records for the students who have Placements for the current year District Services but not for the following year.

Note	Run current class lists prior to running the Maintain Student Placements Utility.

Maintain Team Groups Utility

This utility allows you to run multiple processes depending on which of the following Utility Modes is selected:

- Mass Add: You can add a new Team Group with members that may include the student, Family members, Teachers from the student's current schedule and the student's current Service Providers. At the same time, you can add the new group for students specified in the Student Ranges.

- Mass Update: You can update an existing Team Group by adding new members or removing existing members, and at the same time update the group for the existing students specified in the Student Ranges.

- Mass Delete: You can delete an existing Team Group from the students specified in the Student Ranges.

The records found by the utility are shown to give you the option to remove any students from the list. When the process is selected, you receive a message confirming the updates. A report is created listing the students and the Team Members in the group who were added, updated, or deleted.

Mass Assign Case Manager Utility

This utility assigns the selected Case Manager to *all* Special Education students within the template ranges. You can select students by a range or individually. The results appear and you can choose whether or not to process the records.

Mass Assign IEP Manager Utility

This utility assigns the selected IEP Manager to *all* Special Education students within the template ranges. You can select students by a range or individually. The results appear and you can choose whether or not to process the records.

Mass Exit Special Education Students Utility

This utility allows you to exit multiple students at once from the Special Education module, such as when students graduate. You can select students by a range or individually, and you can choose students based on their Special Education Status. All students processed are assigned the same Exit Date and Exit Reason Code.

All Placements and IEPs are ended as of the selected Exit Date, and the Student's Special Ed Status is set to Inactive. A preview of the modified records appears prior to final processing.

Mass Delete Scheduling Blockers Utility

This utility deletes scheduling blockers for all staff members and times within the specified template ranges for the current Entity.

This utility was designed for another state and has no effect on Washington State school districts.

Mass Delete Spec Ed Students Utility

The Mass Delete Spec Ed Students Utility permanently deletes Special Education students and all of their Special Education information within the specified template ranges. Before running this process, check with the appropriate person in your District to verify that students should be permanently removed from the Special Education module.

	Caution	Once data is deleted, it cannot be retrieved. Run the Mass Delete Spec Ed Students Utility with extreme caution.

Merge Service/Program Codes Utility

The Merge Services/Program Codes Utility takes information tied to the Service/Program/Disability Code in the Merge From field and transfers it into the Service/Program/Disability Code in the Merge To field. District services, staff assignments, student placements, and disabilities that match the Merge From Service/Program Code are updated.

Remove Attachments to Special Ed Students Utility

When you try to delete a Name Record, a message may appear stating that the name cannot be removed because the record is attached to a SE-STU-NOTICE-ATTEND Record, a SE-STU-TEAM-DET Record, or a SE-ASSESS-SUM-TEAM Record. These types of attachments occur when a guardian or staff member is added to the Team Members tab (Student Management\Student Services\SE\PR) on a Special Education student's record.

The Remove Attachments to Special Ed Students Utility can be used to remove the Name Record's association with the SE-STU-NOTICE-ATTEND Record, SE-STU-TEAM-DET Record, and SE-ASSESS-SUM-TEAM Record.

After removing the person's attachment to the student's Special Education Record, you can delete the person from the Name Table.

Special Education Mass Change Utility

The Special Education Mass Change Utility changes the value of selected Special Education fields from one value to another for a group of students. There are two parts of this utility. First, you determine which students and which Evaluations and IEPs of the selected students you want to change, and second, which values you want to change.

To determine which students' Evaluations and IEPs you want the changes to occur on, there are three ranges you can utilize:

- **Student General Ranges**: Using these ranges, you can select students based on information in Student Demographics. Examples include, but are not limited to, students whose Student Status is Active, students who have a General Category of Foster Child, or students with a Date of Birth indicating that they will turn 6 years old within the school year.

- **Student Entity Ranges**: Using these ranges, you can select students based on the Entity Ranges. Examples include, but are not limited to, students with a specific Homeroom or Advisor, students in a particular Activity, or students with a specific Entity Category.

- **Special Education Ranges**: Using these ranges, you can select students based on information on Evaluations and IEPs. Examples include, but are not limited to, students with a specific Type of Evaluation, specific Evaluation Statuses, or selected Disabilities.

You have a sort option that can be set to define the order in which students appear on the confirmation list of students to be changed.

After setting the ranges for the appropriate group of students, you configure the Mass Change Values screen (Figure 45). This screen has two columns of ranges: Current Value and New Value. In the Current Value boxes, you enter the existing value you want to change. In the New Value boxes, you enter the new value for that field.

In the example shown in Figure 45, the district is cleaning up their Evaluation Status Codes on students' Evaluations to make them consistent. The district uses PDS – Parent Declined Services to indicate when the parent declines the initial services offered on the IEP. All Evaluations with an existing Status of Evaluation Code of PRS – Parent Refusal, must be changed to the new Status of Evaluation Code of PDS – Parent Declined Services.

When you run this utility, you have the option to preview the list of students and their changes, or to process the changes without preview.

Figure 45 - Special Education Mass Change Values example

Update Agency of Responsibility Utility

This utility updates the Agency of Responsibility field to match the district code from the Resident District field on the student's Entry/Withdrawal Record for all students. The results appear and you can choose whether or not to process the records.

Update Attendance Area Utility

This utility updates the Attendance area of each student's most current Evaluation to match the school listed on the student's Entry/Withdrawal Record for all students. The results appear and you can choose whether or not to process the records. The Attendance Area field is most often used and accessed in Special Education Forms and reports.

Update IEP/Case Manager Utility

The Update IEP/Case Manager Utility updates the Case and/or IEP Manager to match the teacher listed as the Primary Teacher on the student's Primary Placement Record for all students. This utility is useful if your district assigns the Case Manager or the IEP Manger based on the student's Primary Placement. Run this utility after students are enrolled in new Placements to ensure the Case or IEP Manager reflects the student's new Primary Placement.

Update Medicaid Eligibility Flag

This utility updates the Medicaid Eligibility flag for each Special Education student. If a student has data in the Medicaid Number field, the Medicaid Eligibility flag is set to Yes. Otherwise, the Medicaid Eligibility flag is set to No. You can change the records before you finish running the utility.

Update Service/Program Dates Utility

The Update Service/Program Dates Utility updates the Begin and End Dates of all or selected Service/Programs along with associated student placements. You can also update Staff assignments by selecting the option. This utility is run for all students.

Update Service Enrollment Numbers Utility

The Update Service Enrollment Numbers Utility counts the number of students with the placement for the school year selected, and then places that total in the Class Size field on the District Service list. This total includes all students who received that service between the Service Begin and End dates, even if the student has been dismissed. The results appear and you can choose whether or not to process the records.

Update Student Records Special Ed Information Utility

This utility compares the information on the Special Education tab in Student Profile (Student Management\Students\PR\Special Ed tab) with the information in the Special Education module. Mismatched values are shown, allowing you to update the Special Education tab in Student Profile to match what is in the Special Education module.

Update Students Spec Ed School Utility

This utility updates the Special Education School field on the Evaluation tab with the Building on the student's Primary Placement. In order to run this process, you must select Always update Special Ed School from Primary Placement in the Special Education configuration options. To learn more about this option, see "Configuring Special Education Options" (page 135).

Accessing Special Education Data

In addition to using the Special Education Student Profile, there are several ways you can access and manage student Special Education data. For example, you can use Special Education Entry by Student or the Special Education Tracker to view Special Education information.

If you are a Case Manager, IEP Manager, or Service Provider, you can access information on your Special Education students through Case Manager Access, IEP Manager Access, or Service Provider Access. The method you use depends on your role in the district. This section describes the different ways to access Special Education data.

Using Special Education Entry by Student

Special Education Entry by Student organizes student Special Education data in a table format. The browse view lists each student's record as a row in the table with columns of data about each student.

To use Special Education Entry by Student:

- Go to Student Management\Student Services\SE\ST.

The columns of data that appear across the top of the browse are dependent on the View selected. Special Education has four possible views:

- **General Information:** Displays students and their basic demographic information.

- **Evaluation Details:** Displays students with their Evaluation and IEP information.

- **State Reporting:** Displays students with their Special Education Exit information.

- **Medicaid:** Displays students with their Medicaid information.

There are some unique features in the Special Education browse that can help you manage your Special Education data. The Eval Status, Eval Approval Status, IEP Status and IEP Approval Status columns give you a quick visual of the status of students' Evaluation and IEP Records. These columns are available in all available views.

By using Views and Filters in different combinations, you can create lists of students and work with their data. By expanding the arrow to the left of the student name you have access to the same data as in the Special Education Student Profile.

Using the Special Education Tracker

The Special Education Tracker provides administrators with the ability to see the status of the Special Education students in your district at a glance.

To use the Special Education Tracker:

- Go to Student Management\Student Services\SE\TR.

There are four preset views you can choose from when using the Special Education Tracker. Each view gives you a different set of information about Special Education students.

- **By Student:** Displays a list of Special Education students with their most recent Special Education Records, auto emails that have been sent and any contacts made. Within this preset view there are Filter options you can use to narrow down the list of students you want to see.

- **By Case Manager:** Displays a list of the staff members who are identified as a Case Manager for Special Education Students with the number of students on their case load and record status for those students.

- **By IEP Manager:** Displays a list of the staff members who are identified as an IEP Manager for Special Education Students with the number of students on their case load and record status for those students.

- **Audit:** Displays a list of Special Education students with out-of-date records or missing information, such as students without a disability.

Using Case Manager

Special Education staff members who are designated as Case Managers for students on the Evaluation tab can get a list of their students, as well as the status of an individual student's Special Education Record.

	Caution	Security access determines if a Case Manager can add, change, or view Special Education information when accessing Special Education students using Case Manager. Many districts prefer that Case Managers *not* modify student Special Education data and give them a View Only security level so that they do not add, edit, or delete data.

Case Manager Access is available in the Special Education module and through Educator Access Plus.

To access students as a Case Manager from the Special Education module:

- Go to Student Management\Student Services\SE\CA.

The following three areas are available within Case Manager Access:

- **My Students** (Figure 46): Gives Case Managers a list of their Special Education students with their most recent Special Education Records. Each student's record can be expanded to display the specific Special Education information for that student (Figure 47). Case Managers can print out the details for students as needed.

    - Message Center: Allows service providers to send messages directly to students and families on their case load via the Family Access wall posts or emails.

- **Tracker:** Provides Case Managers a quick way to view the status for all of their Special Education Students. Tracker has three areas of information, General Totals, Evaluation Totals, and IEP Totals.

  - General Totals: Displays how many students are assigned to the Case Manager and breaks them out into Active SE Students and Inactive SE Students. Another total indicates how many students have Placement Records and the total of students who are missing a Primary Placement.

  - Evaluation Totals: Breaks down how many students have Evaluation Start or Case Due dates coming up in the next 60 days, 30 days, 14 days, 7 days, or that are Past Due.

  - IEP Totals: Displays how many students have upcoming IEP Review dates or how many students have expired IEPs.

  The Case Manager can select the number link next to any total to get a list of the students that comprise that number.

  The information in Case Manager Tracker is updated nightly through a Scheduled Task (Product Setup\System Administration\PQ\ST) and is titled Special Education Manager Tracker.

- **Reports:** Gives Case Managers access to multiple Special Education Reports, such as the Three Year Evaluations Due Report, that they can run on the students they are listed as the Case Manager for.

Figure 46 – My Students screen where a Case Manager can view his or her assigned students

Figure 47 – My Students screen with student's record expanded to view Special Education info

To access students as a Case Manager from Educator Access Plus:

- Go to Education Access Plus\Student Services Access\My Cases as Case Manager.

Figure 48 is an example of the view a Case Manager has and the options available when accessed from Educator Access Plus. Table 17 explains the options on the My Cases as Case Manager screen.

To view information for an individual student:

- Click the student's name.

To view a student's current Special Education information:

- Click the Student Services area to the left of the Profile.

Figure 48 – My Cases as Case Manger screen in Educator Access Plus

Option	Description
Filter Options	Determines the list of students that appear on the screen. If you have students in more than one Entity, use this option to display the students in a different Entity. Determines if the student will be included based on the status of their Evaluation.
My Cases Roster	Creates a report that displays a list of the user's students and the information selected.
Attendance Detail Report	Creates a report that displays a list of the user's students and attendance information in the format selected.
Progress Report	Creates a report that displays a list of the user's students and a Progress Report for each student. To learn more about Progress Reports, see the *WSIPC Guide to Secondary Gradebook for Teachers*.
Missing Assign. Report	Creates a report that lists the missing assignments from the gradebook for the selected student.
Report Card Summary	Creates a report that displays a list of the user's students and a Summary Report Card from the Secondary Gradebook for each student. To learn more about Report Cards, see the *WSIPC Guide to Secondary Gradebook for Teachers*.
Standards Report Card	Creates a report that displays a list of the user's students and a Summary Report Card from the Standards Gradebook for each student. To learn more about Report Cards, see the *WSIPC Guide to Standards Gradebook for Teachers*.

Table 17 – My Cases as Case Manager options

Using IEP Manager

Special Education staff members who are designated as IEP Managers on student IEPs can get a list of their students, as well as the status of students' Special Education Records.

⚠️	Caution	Security access determines if an IEP Manager can add, change, or view Special Education information when accessing Special Education students using IEP Manager. Many districts prefer that IEP Managers *not* modify student Special Education data and give them a View Only security level so that they do not add, edit, or delete data.

To access students as an IEP Manager from the Special Education module:

- Go to Student Management\Student Services\SE\IE.

The following three areas are available within IEP Manager:

- **My Students** (Figure 49): Gives IEP Managers a list of their Special Education students with their most recent Special Education Records. Each student's record can be expanded to display the specific Special Education information for that student (Figure 50). IEP Managers can print out the details for students as needed.

  - Message Center: Allows service providers to send messages directly to students and families on their case load via the Family Access wall posts or emails.

- **Tracker:** Provides IEP Managers a quick way to view the status of all their Special Education Students. Tracker has three areas of information, General Totals, Evaluation Totals, and IEP Totals.

  - General Totals: Displays how many students are assigned to the IEP Manager and breaks them out into Active SE Students and Inactive SE Students. Another total indicates how many students have Placement Records and the total of students who are missing a Primary Placement.

- ▫ Evaluation Totals: Breaks down how many students have Evaluation Start or Case Due dates coming up in the next 60 days, 30 days, 14 days, 7 days, or are Past Due.

- ▫ IEP Totals: Displays how many students have upcoming IEP Review dates or how many students have expired IEPs.

The IEP Manager can select the number link next to any total to get a list of the students that comprise that number.

The information in IEP Manager Tracker is updated nightly through a Scheduled Task (Product Setup\System Administration\PQ\ST) and is titled Special Education Manager Tracker.

- **Reports:** Gives IEP Managers access to multiple Special Education Reports, such as the IEPs Expiring Report, that they can run on just the students they are listed as the IEP Manager for.

Figure 49 – IEP Manager\My Students screen where an IEP Manager can view his or her assigned students

Figure 50 – IEP Manager\My Students screen with student's record expanded to view Special Education information

To access students as an IEP Manager from Educator Access Plus:

- Go to Education Access Plus\Student Services Access\My Students as IEP Manager.

Figure 51 is an example of the IEP Manager's view and the options available when he or she accesses students from Educator Access Plus. Table 18 explains the options available on the My Students as IEP Manager screen.

To view information for an individual student:

- Click the student's name.

To view a student's current Special Education information:

- Select the Student Services area to the left of the Profile.

Figure 51 – My Students as IEP Manger screen in Educator Access Plus

Option	Description
Filter Options	Determines the list of students that appear. If you have students in more than one Entity, use this option to display the students in a different Entity. Determines if the student is included based on the status of their IEP.
My Cases Roster	Creates a report that displays a list of the user's students and the information selected.

Option	Description
Attendance Detail Report	Creates a report that displays a list of the user's students and attendance information in the format selected.
Progress Report	Creates a report that displays a list of the user's students and a Progress Report for each student. To learn more about Progress Reports, see the *WSIPC Guide to Secondary Gradebook for Teachers.*
Missing Assign. Report	Creates a report that lists the missing assignments from the gradebook for the selected student.
Report Card Summary	Creates a report that displays a list of the user's students and a Summary Report Card from the Secondary Gradebook for each student. To learn more about Report Cards, see the *WSIPC Guide to Secondary Gradebook for Teachers.*
Standards Report Card	Creates a report that displays a list of the user's students and a Summary Report Card from the Standards Gradebook for each student. To learn more about Report Cards, see the *WSIPC Guide to Standards Gradebook for Teachers.*

Table 18 – My Cases as IEP Manager options

Using Service Provider Access

Special Education staff members who are designated as Service Providers on students' Placements can get a list of their students, as well as the status of an individual student's Special Education Record.

	Caution	Security access determines if Service Providers can add, change, or view Special Education information when accessing Special Education students using Service Provider. Many districts prefer that Service Providers *not* modify student Special Education data and give them a View Only security level so that they do not add, edit, or delete data.

Service Provider Access is available in the Special Education module.

To access students as a Service Provider from the Special Education module:

- Go to Student Management\Student Services\SE\SE\MS.

The following area is available under Service Provider:

- **My Students:** Gives Service Providers a list of their Special Education students with their most recent Special Education Records. Each student's record can be expanded to display the specific Special Education information for that student. Service Providers can print out the details for students as needed.

  - Message Center: Allows service providers to send messages directly to students and families on their case load via the Family Access wall posts or emails.

Using Team Member Access

Special Education staff who are designated as Team Members on students' Special Education Records can get a list of their students, as well as the status of an individual student's Special Education Record.

⚠️	Caution	Security access determines if Team Members can add, change, or view Special Education information when accessing Special Education students using Team Members. Many districts prefer that Team Members *not* modify student Special Education data and give them a View Only security level so that they do not add, edit, or delete data.

Team Member Access is available in the Special Education module.

To access students as a Team Member from Special Education:

- Go to Student Management\Student Services\SE\TE\MS.

The following area is available under Service Provider:

- **My Students:** Gives Team Member a list of their Special Education students with their most recent Special Education Records. Each student's record can be expanded to display the specific Special Education information for that student. Team Members can print out the details for students as needed.

  - Message Center: Allows service providers to send messages directly to students and families on their case load via the Family Access wall posts or emails.

Viewing the Student Information Screen

The Student Information screen provides a view of a student's data from Student Profile that you can access while working in the Special Education module. For example, as a Special Education user, you spend the majority of your time in the Special Education module. When you need to view the student's class schedule, Entry Date, or to see if they have Discipline Records, you can find that information on the Student Information screen instead of navigating to different modules.

You can access the Student Information screen when you are in the Special Education Entry by Student, Special Education Tracker, Case Manager, IEP Manager, Service Provider, and Team Member areas, as well as most other Student browse views such as the Entry by Student screen in Discipline, Health, and Food Service.

For example, when you are on the Special Education Entry by Student screen (Student Management\Student Services\SE\ST), the student names appear in a list. When you select a student's record in the list, the student's name becomes a hyperlink within the Last Name and First columns (see Figure 52). You can click either the student's last or first name to access the Student Information screen.

Note	The security line item, WS\ST\SI\IF, determines whether the icon appears on the Student Demographic header and what data appears on the user's Student Information screen.

Figure 53 shows the Student Information screen and the different areas of information available.

To view the Student Information screen:

- Do one of the following:

  - In Last Name column click the student's last name link.

  - In the First column, click the student's first name link.

Figure 52 – Entry by Student screen, where you click the student's name link to access their Student Information screen

Figure 53 – Student Information Profile screen

Configuring the Special Education Module

Before your district can use the Special Education module for the first time, the following options must be configured and codes set up:

- Configuring Special Education Options
- Setting Up Special Education Codes
- Configuring Disabilities, Programs, and Related Services
- Configuring Special Education Staff
- Configuring District Services
- Configuring Event Auto Emails
- Configuring Nightly Auto Emails
- Configuring Special Education Custom Forms
- Using Special Education Student Indicators

This section shows you how to set up and configure codes, options, and other areas in the Special Education module.

Configuring Special Education Options

There are several Special Education options you must configure in order to use the Special Education module. These options are set up to simplify data entry. Settings are applied to the entire district and cannot be configured for individual users. Configuration selections reflect your district's business practices.

Enabling the Special Education Module

The first task when configuring the Special Education module is to enable it. You must select this option in order for your district to use the Special Education module.

To enable the Special Education module:

1. Go to Student Management/Student Services/SE Setup/CF/SE.
2. Select the Enable the Special Education Module check box on the Special Education Configuration screen (Figure 54).

3. After enabling the Special Education module, continue to "Setting Up Date Calculations" (page 137).

Figure 54 – Enable the Special Education Module

Setting Up Date Calculations

Date Calculations allow you to define how you want different dates to automatically calculate as default dates during entry of Special Education information. These dates default into the boxes on the screen, but they can be changed as needed.

To set up Date Calculations:

1. Go to Student Management/Student Services/SE Setup/CF/SE.

2. Configure the Date Calculations area on the Special Education Configuration screen (Figure 55). Table 19 describes the options in the Date Calculations area.

3. After setting up Date Calculations, continue to "Setting Up Grace Periods" (page 139).

Figure 55 - Special Education Configuration screen - Date Calculations area

Option	Description
Case Due Number of Days	For Initial Evaluations, the number of days added to the Evaluation Permission Date to populate the Case is Due. For Reevaluations or Transfers, the number of days to add to the Evaluation Start Date to populate the Case is Due.
Calculate Case Due Date Using	The Calendar Days option uses calendar days to determine when the case is due. The School Days option uses the days in the school calendar for the student's default entity to determine when the case is due.
Start Next Evaluation Date = Next Evaluation Date minus	Number of days before the Next Evaluation date that you want the Start Next Evaluation date to be set to.
Request for Consent Date = Start Evaluation Date plus	Number of days after the Evaluation Start date that the Request for Consent must be sent. **Note:** *Do not* set this configuration since the functionality is designed for another state and has no effect on Washington State school districts.
Reevaluation	Populates the Evaluation Start date on a new Reevaluation Record with the Start Next Evaluation date from the previous Evaluation Record.
Calculate IEP End Date using	Determines which date to use to calculate the IEP End Date. The IEP Meeting Date option calculates the IEP End Date beginning with the IEP Meeting Date and add 1 year minus 1 day. The IEP Start Date option calculates the IEP End Date beginning with the IEP Start Date and add 1 year minus 1 day.

Table 19 – Special Education Date Calculation options

Setting Up Grace Periods

Grace Periods provide users with a specified number of days past the expiration date of an Evaluation or IEP to make any needed changes to the record. An Evaluation expires on the date entered in the Next Evaluation box. An IEP expires on the date entered in the IEP End box.

To set up Grace Periods:

1. Go to Student Management/Student Services/SE Setup/CF/SE.

2. Configure the Grace Periods area on the Special Education Configuration screen (Figure 56). If your district wants to allow changes regardless of the expiration, you can type "999" for each Grace Period.

3. After setting up Grace Periods, continue to "Configuring Defaults for Special Education Module Options" (page 140).

Figure 56 - Grace Periods area of Special Education Configuration screen

Configuring Defaults for Special Education Module Options

There are specific Special Education options that allow your district to set defaults for entering data, track changes users make in the Special Education module, and show Special Education information in Family Access.

To configure defaults for Special Education Module Options:

1. Go to Student Management/Student Services/SE Setup/CF/SE.

2. Configure the Special Education Module Options area on the Special Education Configuration screen (Figure 57). Table 20 describes the options in this area.

3. Continue to "Setting Up Withdrawal Options" (page 145).

Figure 57 – Special Education Module Options area of the Special Education Configuration screen

Option	Description
Only create Placement Records for the Current School Year	Only current year placements are created. *Do not* select this option, to ensure that a student has placements covering the full timeframe of their IEP.
Default New Evaluations to WIP	Defaults the Work in Progress (WIP) option as selected whenever a new Evaluation is created.
Always update Special Ed School from Primary Placement	Updates the Special Education School on the Evaluation Info tab with the school attached to the student's Primary Placement.
Default New IEPs to WIP	Defaults the Work in Progress (WIP) as selected whenever a new IEP is created.
Allow Student Special Ed tab Updating	This option was designed for another state and could adversely affect data if selected by Washington State users. **Do not select this option**. This option allows users to enter Special Education data on the Special Ed tab in Student Profile (Student Management\Students\ST\PR). However, data entered on the Student Profile Special Education tab *does not* update the Special Education module. The data is stored in the Classification table. *All Washington State school districts must enter Special Education information using the Special Education module.*
Default IEP Manager to Case Manager	Automatically populates the IEP Manager box with the same name that exists in the Case Manger field on the Evaluation attached to the IEP being added.
Display Only SE Staff for Case/IEP Manager	Limits staff members to only Special Education Staff as available options when choosing a Case/IEP Manager.
Assign Evaluation Forms the Same Approval Status as the Evaluation	This option was designed for another state and is *not* used in Washington State.

Option	Description
Assign IEP Forms the Same Approval Status as the IEP	This option was designed for another state and is **not** used in Washington State.
Show Special Ed in Family Access by Family	Allows the Special Education staff to determine if the Special Education data is viewable in Family Access. Additional settings need to be configured to complete the display of Special Education data in Family Access. To learn more about how to configure Family Access options, see the *WSIPC Guide to Family and Student Access Administration and Management.*
Track Special Ed Changes	Changes to any Special Education Record are logged with the user, the date and time, and the change. You can view the change log using the History button throughout the Special Education module. **Best Practice:** Select this option.
Allow Users to Update Checked-Out Forms	This option was designed for another state and has no effect on Washington State school districts.
Prevent Update for: ___ # Minutes After Last Save	This option is unavailable because it was designed for another state.
Display Color Indicator for Students Turning 6 Years of Age Within NN Days or Less	Displays a colored Age Status indictor on students who are approaching their sixth birthday, minus the number of days entered in the box. The Age Status indicator appears under the Spec Ed Exit Info box in Special Education Student Profile. It also appears as an Age Status column in the following Special Education areas: ▪ Entry by Student ▪ Case Manager\My Students ▪ IEP Manager\My Students ▪ Service Provider\My Students ▪ Team Member\My Students

Option	Description
Display Color Indicator for Students Turning 14 Years of Age Within NN Days or Less	Displays a colored Age Status indictor on students who are approaching their fourteenth birthday, minus the number of days entered in the box. The Age Status indicator appears under the Spec Ed Exit Info box in Special Education Student Profile. It also appears as an Age Status column in the following Special Education areas: ▪ Entry by Student ▪ Case Manager\My Students ▪ IEP Manager\My Students ▪ Service Provider\My Students ▪ Team Member\My Students
Display Color Indicator for Students Turning 18 Years of Age Within NN Days or Less	Displays a colored Age Status indictor on students who are approaching their eighteenth birthday, minus the number of days entered in the box. The Age Status indicator appears under the Spec Ed Exit Info box in Special Education Student Profile. It also appears as an Age Status column in the following Special Education areas: ▪ Entry by Student ▪ Case Manager\My Students ▪ IEP Manager\My Students ▪ Service Provider\My Students ▪ Team Member\My Students

Option	Description
SE Student Code	Allows you to assign a specific Student Type Code to students who are added to the Special Education module and is set in conjunction with the Exited SE Student Code value. The Student Type Code appears in Student Demographics (Student Management\Students\ST\PR\ Entity tab\Entity Info). Student Type is a parameter on numerous reports and utilities throughout the software, which allows Special Education students to be excluded or included on reports or utility processes. Student Type Codes are a district code. To learn more about how to set up Student Types, see the *WSIPC Guide to Student Demographics and Families.*
Exited SE Student Code	Allows you to assign a specific Student Type Code to students who exit from the Special Education module and is set in conjunction with the SE Student Code value. The Student Type Code appears in Student Demographics (Student Management\ Students\ST\PR\ Entity tab\Entity Info). For example, you configure the SE Student Code box with a value of S – Special Education so users can exclude or include only Special Education students from demographic reports and utilities. When a student exits Special Education, you can revert their Student Code back to the general value your district has set (typically R = Regular). Students are no longer excluded or included only on reports and utilities when the Student Code is reverted. Student Type Codes are a district code. To learn more about how to set up Student Types, see the *WSIPC Guide to Student Demographics and Families.*
District Medicaid Nbr	This option was designed for another state and has no effect on Washington State school districts.

Option	Description
Color Options	Determines whether the status indicators that appear on a student's Evaluation and IEP display in bright or pastel colors.

Table 20 – Special Education Module options

Setting Up Withdrawal Options

When a student withdraws from your district, there are two options in Skyward's School Management System that determine how the Special Education student is withdrawn.

To set up Withdrawal Options:

1. Go to Student Management/Student Services/SE Setup/CF/SE.

2. Configure the Withdrawal Options area on the Special Education Configuration screen (Figure 58). Table 21 describes the options in this area.

3. Click Save.

Figure 58 – Special Education Configuration screen – Withdrawal Options area

Option	Description
Automatically change IEP and placement dates when a student is withdrawn	When any student withdraws from your district, this option also exits the student from Special Education using the Exit Reason Code you enter in the Exit Reason box under this option. The following occurs on the student's Special Education Record when the student is withdrawn from your district (Basic Ed) and the Withdrawal Options are configured: ■ The student is exited from Special Education. The Exit Reason selected in this option is placed in the Exit Reason field on the State Reporting tab (Student Management\Student Services\SE\PR\State Reporting tab). ■ The Special Education Exit Date on the State Reporting tab (Student Management\Student Services\SE\PR\State Reporting tab) is added to reflect the Withdrawal Date entered on the student's Entry/Withdrawal tab (Student Management\Students\ SE\PR\Entry/With tab). ■ The student's IEP and associated placements are ended with the Withdrawal Date entered on the student's Entry/Withdrawal tab (Student Management\Students\SE \PR\Entry/With tab). **Note:** You can select only one Exit Reason Code with this configuration option, which doesn't align with the Exit Reasons that must be reported in CEDARS.

Option	Description
Only allow Inactive Special Ed students to be withdrawn	If this option is selected, students who are Active in Special Education cannot be withdrawn from Student Management. When a user tries to withdraw a student in Student Management the user receives the following message: "Student is active in Special Education. You will not be able to withdraw this student. Please contact the Special Education Office."

Table 21 - Special Education Withdrawal Options

Setting Up Contact Information Options

Contact Information allows districts to enter names and telephone numbers of district personnel to be contacted for Special Education related questions. This Contact Information can then be incorporated into Special Education Forms and merged into Special Education documents.

Setting Up Locking Options

Within the Evaluation and IEP Records you have the option to lock the record. This prevents other users from making changes to these records. If your district chooses to use Locking Options, additional areas can be included when locking the Evaluation or IEP.

To set up Locking Options:

1. Go to Student Management/Student Services/SE Setup/CF/SE.

2. Configure the Locking Options area on the Special Education Configuration screen. Figure 59 shows the additional areas you can lock when locking an Evaluation or IEP.

3. Click Save.

Figure 59 - Special Education Locking Options area

Setting Up Printing/Form Options

The Printing/Form Options area for Special Education is *not* used in Washington State.

Setting Up Student Profile Options

Student Profile Options determine how the IEP Records are listed in the Special Education Student Profile. The IEP Tab Display allows you to choose the type of date that appears in the IEP Information sub-tab, and whether a code for the type of IEP also display.

To set up Student Profile Options:

1. Go to Student Management/Student Services/SE Setup/CF/SE.

2. Configure the Student Profile Options area on the Special Education Configuration screen (Figure 60). Table 22 describes the options in this area.

3. Click Save.

Figure 60 – Special Education Student Profile Options area

Option	Description
IEP Tab Display	Determines which date displays on the sub-tab under IEP Information when the IEP tab is expanded. There are three display options: ▪ IEP Meeting Date (M) ▪ IEP Revision Date (R) ▪ IEP Start Date (S) Default is the Start Date. If the Start Date is used, no letter indicator appears next to the date on the sub-tab.
Display IEP Type Code next to Date	Determines if the IEP Type Code appears next to the date selected in the option above on the IEP sub-tab.

Table 22 – Student Profile Options area descriptions

Setting Up Teacher Access Display Options

Special Education information can be displayed in Educator Access Plus. You can control what Special Education information teachers see for their students by selecting the desired check boxes.

In the Other Student Services Areas there are two additional modules that you can enable for your teachers to view. If your district uses the Section 504 module or the Gifted and Talented module, select the appropriate check box to display information to teachers in Educator Access Plus. To learn about the Section 504 module, see the *WSIPC Guide to Section 504.* To learn about the Gifted and Talented module, see the *WSIPC Guide to Gifted and Talented.*

To set up Teacher Access Display options:

1. Go to Student Management/Student Services/SE Setup/CF/SE.

2. Configure the Teacher Access Display area on the Special Education Configuration screen. Figure 61 shows the Special Education information that you can select to show in Educator Access Plus.

Tip	The Require Teacher Agreement for IEP and Require Teacher Agreement for Section 504 options allow teachers to indicate that they have reviewed all of the necessary forms and agree to comply with the student's IEP and/or 504 Plans.

3. If your district has configured the Section 504 module or the Gifted and Talented module, you can display these areas in Educator Access Plus. To display these areas, select these options in the Other Student Services Areas area.

4. Click Save.

Figure 61 – Special Education Teacher Access Display area

Setting Up Special Education Codes

Before you start using the Special Education module, you must set up Special Education Codes. Codes are necessary for the Special Education module to run properly, to enter Special Education data on students, and are crucial for running accurate State Reports. You must also set up specific codes if your district intends to use the Special Education Import Process.

All codes are set up with a five-character alpha-numeric code, a Short Description, and a Long Description. Most Special Education Codes also include an Active or Inactive Status option. Some codes have additional options that you set up to use for State Reporting.

To set up Special Education Codes:

- Go to Student Management/Student Services/SE Setup/CO.

Building Codes

Building Codes are used to indicate where services are being provided. Building Codes are selected on the District Service Maintenance screen. When running the Update Students Spec Ed School Utility, the Building Code attached to the student's Primary Placement populates the Special Ed School box on the Evaluation Information screen.

Education Environment Codes

These codes equate to the Washington State Least Restrictive Environment (LRE) Codes. LRE Codes are used in State Reporting. You select the LRE Code on the IEP Maintenance screen.

The following Education Environment Codes are defined by OSPI and you must set them up for State Reporting:

Aged 0-2	Code	Description
	23	Home
	27	Other than Home or Community Based
	20	Community Setting

Aged 3-5	Code	Description
	13	Early Childhood Home setting
	15	Early Childhood Residential Facility
	16	Early Childhood Separate School
	35	Separate class
	36	Service provider location
	14	Regular EC Program at least 10 hours per week with majority of Special Education services in another location
	17	Regular EC Program at least 10 hours per week with majority of Special Education services in regular EC program
	18	Regular EC Program less than 10 hours per week with majority of Special Education services in regular EC program
	19	Regular EC Program less than 10 hours per week with majority of Special Education services in another location

Aged 6-21	Code	Description
	01	80% – 100% Regular Class
	02	40% – 79% Regular Class
	03	0% – 39% Regular Class
	08	Homebound or Hospital Program
	28	Public or private separate day school facilities
	29	Public or private residential facilities during the school week
	30	Correctional facilities
	31	Enrolled in Private school by parent

To learn more about the LRE Codes and their use, see the online OSPI CEDARS Data Manual at `http://www.k12.wa.us/CEDARS/Manuals.aspx`.

Note	Educational Environment Codes are the same as the IEP Federal Settings Codes described in "IEP Federal Settings Codes" (page 156). Washington State LRE Codes are maintained in either of these areas because they access the same table of codes.

Evaluation Qualification Codes

Evaluation Qualification Codes were designed for another state and are not used in Washington State.

Evaluation Status Codes

Evaluation Status Codes are used to track the condition of a student's Evaluation. This code is used in the Status of Evaluation box on the Evaluation Record. Each Evaluation Status Code is assigned a Reporting Status value that indicates the result of the Evaluation Record. The Reporting Status is used in many State Reports, so it's important they are set correctly for each Evaluation Status Code your district sets up. Reporting Status options are described in Table 23.

Note	Specific Evaluation Status Codes must be set up for the Special Education Import to complete properly. To learn more about required codes for importing Special Education information, see the *WSIPC Guide to Special Education Import Process.*

Option	Description
Open	Evaluation has not yet been completed. This Reporting Status can be used on an Evaluation Status Code, such as IP – In Process, to indicate that the Evaluation is still in progress.
Closed: SPED	Evaluation is complete and the student qualifies for Special Education services. This Reporting Status can be used on an Evaluation Status Code, such as COM – Complete, to indicate that the Evaluation is completed and the student qualified for Special Education services.
Closed: Not SPED	Evaluation is complete and the student does not qualify for services. This Reporting Status can be used on an Evaluation Status Code, such as DNQ – Did Not Qualify, to indicate that the Evaluation is completed, but the student did not qualify for Special Education services.
Closed: Other	Evaluation is closed, but was not completed. This Reporting Status can be used with an Evaluation Status Code, such as PNC – Process Not Completed, to indicate that the Evaluation was not finished. For example, the district started the evaluation process but the student withdrew from the district before the Evaluation was completed.
Awaiting Signature	District is still waiting for parental consent to evaluate the student. This Reporting Status can be used with an Evaluation Status Code, such as NOCON – Awaiting Consent, to indicate that a signed consent form to evaluate has not been received.

Table 23 – Reporting Status Codes for Evaluation Status Codes

Evaluation Type Codes

Evaluation Type Codes work in conjunction with the Type of Evaluation values and allow you to further identify groups under each of the Type of Evaluation values:

- Evaluation (Initial Evaluation)
- Reevaluation
- Transfer

Note	Specific Evaluation Type Codes must be set up for the Special Education Import to complete properly. To learn more about required codes for importing Special Education information, see the *WSIPC Guide to Special Education Import Process.*

Figure 62 – Evaluation Type Maintenance screen where a waiver code is added

Exit Reason Codes

Exit Reason Codes are used to explain why a student exits the Special Education program. These codes are used when producing the CEDARS extract file as well as in other Special Education State Reports.

For the CEDARS file, specific State Reporting Codes defined by school year, must be selected on the Exit Code when a student leaves the Special Education program within a district. Exit Reason Codes can be defined with one of the following State Reporting Codes:

- 1 - Reevaluated and no longer needs Special Education Services (2003-9999)
- 2 - Aged Out (2003- 9999)
- 3 - Graduated with High School Diploma (2003-2014)
- 4 - Parent Revokes Consent for Special Education Services (2003- 9999)
- 6 - Confirmed Transfer to Other Edu Entity & Cont in SpecEd (2014-2014)

Beginning in School Year 2015, if the student leaves your district and transfers to another district, the Special Education Exit Reason Code must be defined with a State Rpt Code of "6."

- 6 – No longer enrolled in District (2015-9999)

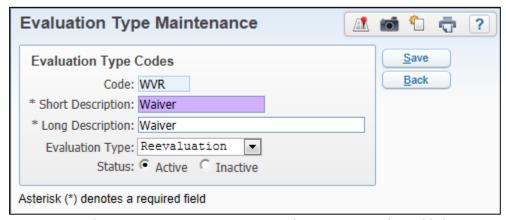| Note	Specific Exit Reason Codes must be set up for the Special Education Import to complete properly. To learn more about required codes for importing Special Education information, see the *WSIPC Guide to Special Education Import Process.*

IEP Federal Settings Codes

IEP Federal Settings Codes are the same as the Education Environment Codes described above. Washington State LRE Codes can be maintained in either area since both options access the same table of codes. See "Education Environment Codes" (page 152) for the valid codes needed for setup.

IEP Frequency Codes

IEP Frequency Codes indicate how often a service is provided, such as daily, once a week, or twice a week. This code is used on the Placement Maintenance screen.

IEP Long Term Goal Codes

IEP Long Term Goal Codes were designed for another state and are not used in Washington State.

IEP Short Term Goal Codes

IEP Short Term Goal Codes were designed for another state and are not used in Washington State.

IEP Type Codes

IEP Type Codes identify the type of IEP Record, such as Initial, Review, or Amendment.

Medicaid Transfer Reason Codes

Medicaid Transfer Reason Codes were designed for another state and are not used in Washington State.

Referral Reason Codes

Referral Reason Codes indicate the reason the student was referred to Special Education.

Service Level Codes

Service Level Codes were designed for another state. Although the Service Level field is available on the Washington Special Education Service screen, it is *not* used in Washington State.

Service Type Codes

Service Type Codes were designed for another state and are not used in Washington State.

Special Education Schools Codes

Special Education School Codes identify where the student receives Special Education services. In many cases, the Special Education School Code matches the Entity number of the school that provides the services. A Building Number must be assigned to the School Code if you use the Update Students Spec Ed School Utility.

Special Transportation Needs Codes

Special Transportation Needs Codes define transportation requirements for the student. These codes are used on the Special Transportation Maintenance screen.

Staff Assignments Codes

Staff Assignment Codes were designed for another state. Although the Staff Assignment field is available on the Washington Special Education Staff Assignment screen, it is *not* used in Washington State.

Staff Positions Codes

Staff Position Codes were designed for another state. Although the Staff Position field is available on the Washington Special Education Staff Assignment screen, it is *not* used in Washington State.

Staff/Team Roles Codes

Staff/Team Roles Codes identify the role of each staff member in Team Meetings. This role is assigned to a staff member when they are added as a Team Member.

Configuring Disabilities, Programs, and Related Services

The Special Education programs and related services that your district provides to Special Education students are defined and configured in the Services and Programs configuration area of the Special Education module.

The Service and Programs configuration area is also where you define and configure Disability Codes used to identify the student's Disability Category.

Information on how to configure Disability Codes and Service/Program Codes is explained in this section.

Configuring Disabilities

During the Special Education Evaluation process, a student is determined to have a disability based on the Federal definitions of 14 Disability Categories. These categories are defined as Disability Codes in the Special Education module and are used in State Reporting. To ensure each Disability Code is valid for State Reporting, the correct corresponding State Rpt Code value must be assigned.

To configure Disabilities:

1. Go to Student Management/Student Services/SE Setup/CF/SP.

2. Click Add.

3. Configure the Special Education Maintenance screen. Figure 63 shows an example of the options selected to identify the code as a Disability. Table 24 describes the options used on this screen to configure Disabilities.

4. Click Save.

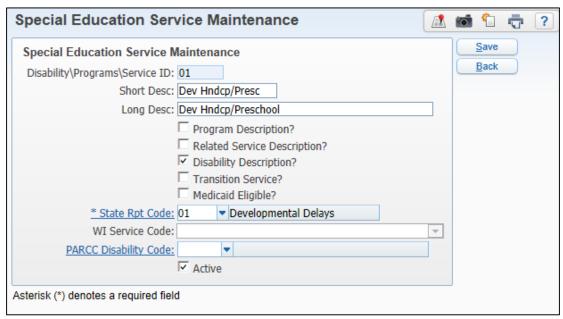| Note	Disability Codes are required for State Reporting and must be defined.

Figure 63 – Special Education Service Maintenance screen configured for a Disability

Option	Description
Disability\Programs\Service ID	An alpha-numeric code (two-digit) representing the description of the Disability.
Short Desc	Up to 15 character description of the Disability.
Long Desc	Up to 50 character description of the Disability.
Disability Description?	Select if this code represents a Disability in your district. This code will be available in the Disability list when adding a Disability on a student.
State Rpt Code	Appears when Disability Description is selected. Select one of the State Reporting Codes listed that matches your code: 01 - Developmental Delays 02 - Emotional/Behavioral Disability 03 - Orthopedic Impairment 04 - Health Impairment 05 - Specific Learning Disability 06 - Intellectual Disability 07 - Multiple Disabilities 08 - Deafness 09 - Hearing Impairment 10 - Visual Impairment 11 - Deaf-Blindness 12 - Communication Disorders 13 - Autism 14 - Traumatic Brain Injury
WI Service Code	This option was designed for another state and is *not* used in Washington State.
Active	Indicates that the code will be available in the appropriate list for selection.

Table 24 - Options on the Special Education Service Maintenance screen when configuring Disabilities

Configuring Services and Programs

A section of the IEP includes programs and related services that students receive based on their individual needs. These codes must be configured before you can set up your District Services. For example, if your district has a Program of AUD – Audiology, you first add the AUD – Audiology Code to the Services and Program Code table. This step makes the code available when you add your District Service Record of AUD – Audiology. After the District Service is configured, you can enroll students in that program as a part of their Placement on the IEP.

Related services supplement and support students' Special Education Programs. For example, you can add codes for Transportation or Itinerant services as a Related Service to identify the Program as a Placement on the student's IEP Record.

These codes are not used in State Reporting and are optional. If you do not track programs and related services on students' IEPs, some Special Education reports and utilities will not have data to report or process.

To configure services and programs:

1. Go to Student Management/Student Services/SE Setup/CF/SP.

2. Click Add.

3. Configure the Special Education Maintenance screen. Figure 64 shows an example of the options selected to identify the code as a Program. Table 25 describes the available options when configuring programs and related services.

4. Click Save.

Figure 64 – Special Education Service Maintenance configured for a Program

Option	Description
Disability\Programs\Service ID	An alpha-numeric code (up to three characters) representing the description of the Special Education Program, Related Service or Disability.
Short Desc	Description (up to 15 characters) of the Special Education Program, Related Service or Disability.
Long Desc	Description (up to 50 characters) of the Special Education Program, Related Service or Disability.
Program Description?	Code that represents a service or program that the district is offering to Special Education students. Code will be available in the Special Service list for selection when adding a District Service.
Related Service Description?	Code represents a Related Service that the district is offering to Special Education students. Code will be available in the Special Service list for selection when adding a District Service.

Option	Description
Transition Service?	Select if this Program or Related Service is considered a Transition Service in your district.
Medicaid Eligible?	Select if this Program or Related Service is eligible for Medicaid reimbursement.
WI Service Code	This option was designed for another state and is *not* used in Washington State.
Active	Indicates that the code will be available in the appropriate list for selection.

Table 25 – Special Education Service Maintenance options

Configuring Special Education Staff

Special Education Staff are those who provide Special Education Programs and Services to Special Education students. Once you've added the Special Education Staff, you can assign them to a District Service.

Adding Special Education Staff

The Special Education Staff Maintenance area allows you to add existing staff to the Special Education module and include additional information specific to Special Education.

Since students' IEPs and Placements usually span more than one school year, you must maintain District Services and Special Education Staff for the current *and* next school years. If District Services and Special Education Staff Records are not created and maintained for the next school year, students will not have Placements automatically created for the next school year.

For example, when adding a new Special Education Staff member, you create two Special Education Staff Records. The staff member must be added to the Special Education Staff table for the 2016 School Year and to the table for the 2017 School Year.

Note	Staff members must exist in the district Name Table (Student Management\Advanced Features\NA\NM) and the Staff table (Student Management\Staff\SF\SF) before you can add them to the Special Education Staff table.

To configure Special Education Staff:

1. Go to Student Management/Student Services/SE Setup/CF/SF.

2. Click Add.

3. Configure the Special Ed. Staff Maintenance screen (Figure 65). Table 26 describes each option on this screen.

4. Click Save.

5. Repeat steps 2 through 4 to add the same staff member to the Special Education Staff table for the next school year.
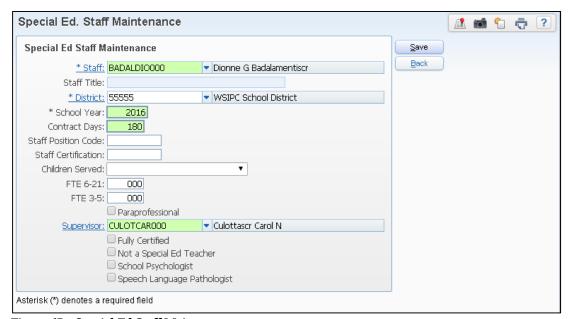

Figure 65 – Special Ed Staff Maintenance

Option	Description
Staff	Staff member you want to add to the Special Education staff list, selected from the Staff selection list.
Staff Title	Staff member's title. The title will be populated from the Staff Record in your district. You cannot change this information from this screen.
District	The district number in which the staff will be providing services. This list contains all the districts in the District Code table.
School Year	School year the Special Education Staff member will be working in the Special Education department. If you know the staff member will be working with Special Education students for the following year, you would add the staff member for both school years, current and next.
Contract Days	Number of days the staff member is contracted to teach. This is informational only and does not appear anywhere else in the software.
Staff Position Code	Free-form information pertaining to the staff member's position. This is informational only and does not appear anywhere else in the software.
Staff Certification	Free-form information pertaining to the staff member's certification. This is informational only and does not appear anywhere else in the software.
Children Served	Defines which age group of students the staff member serves. This is informational only and does not appear anywhere else in the software.
FTE 6-21	Full Time Equivalent number of students ages 6 to 21 served by the staff member. This is informational only and does not appear anywhere else in the software.
FTE 3-5	Full Time Equivalent number of students ages 3 to 5 served by the staff member. This is informational only and does not appear anywhere else in the software.

Option	Description
Paraprofessional	Indicates that the staff member is a qualified Paraprofessional. This is informational only and does not appear anywhere else in the software.
Fully Certified	Indicates that the staff member is fully certified. This is informational only and does not appear anywhere else in the software.
Not a Special Ed Teacher	Indicates that the staff member is not a Special Education Teacher. This is informational only and does not appear anywhere else in the software.
School Psychologist	Indicates that the staff member is a School Psychologist. This is informational only and does not appear anywhere else in the software.
Speech Language Pathologist	Indicates that the staff member is a Speech Language Pathologist. This is informational only and does not appear anywhere else in the software.

Table 26 – Special Education Staff Maintenance options

Adding District Service to Special Education Staff

After you add Special Education Staff, you can assign them to a District Service without having to navigate to the District Services Configuration area. Similar to adding two Special Education Staff Records for the current school year and the next school year, you must add District Service(s) for multiple years to each Special Education Staff Record.

To add a District Service to Special Education Staff:

1. Go to Student Management\Student Services\SE Setup\CF\SF.

2. Select the first Special Education Staff Record you want to add a District Service to, and click Services.

3. Click Add on the District Services screen.

4. On the YYYY-YY District Services screen (Figure 66), select the District Service you're adding to the Special Education staff member, paying attention to the School Year associated with the District Service.

Tip	Click the School Year button on the right side of the screen to view District Services for a different school year.

5. Click Select.

6. Configure the Staff Assignment Maintenance screen (Figure 67). Table 27 describes the options on this screen.

7. Click Save.

8. Repeat steps 3 through 7 to add the same District Service to the Special Education staff member for the next school year
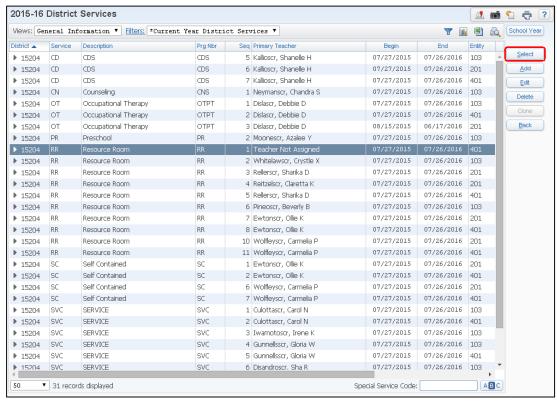

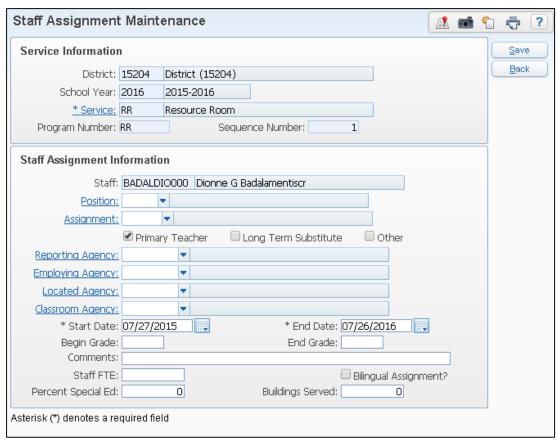Figure 66 – District Services screen where you select which service to attach to staff members

Figure 67 – The Staff Assignment Maintenance screen where you mark the staff member as a Primary Teacher

Option	Description
Staff	Staff member's Namekey. You cannot edit this box.
Position	Staff member's position. This option is *not* available for Washington State Reporting because it was designed for another state.
Assignment	Primary role the staff member plays in Special Education, such as Case Manager, Secondary Teacher, or Teacher Manager. This option is *not* available for Washington State Reporting because it was designed for another state.
Primary Teacher	Determines whether the staff member is the Primary Teacher for this Service. If the staff member is marked as Primary Teacher on the Service, the staff member's name appears on the District Service list. To learn how to run the Update IEP/Case Manager Utility to populate students' Case Manager and/or IEP Manager fields with their Primary Teacher, see "Update IEP/Case Manager Utility" (page 117).
Long Term Substitute	Determines whether the staff member is a long term substitute. This option was designed for another state and is *not* used in Washington State.
Other	Determines whether the staff member is not the Primary Teacher. This option was designed for another state and is *not* used in Washington State.

Option	Description
Reporting Agency	District that reports the staff member to the State. This option was designed for another state and is **_not_** used in Washington State.
Employing Agency	District that employs the staff member. This option was designed for another state and is **_not_** available on Washington State Special Education Reports.
Located Agency	District where the service is provided. This option was designed for another state and is **_not_** used in Washington State.
Classroom Agency	District responsible for the classroom. This option was designed for another state and is **_not_** used in Washington State.
Start Date	Start date of the staff member's assignment to the service. Typically, the Staff Assignment Start Date aligns with the District Service's Begin Date, unless the staff starts after the first day of school.
End Date	End date of the staff member's assignment to the service. Typically, the Staff Assignment End Date aligns with the District Service's End Date, unless the staff plans to leave during the School Year.
Begin Grade	Lowest grade level the staff member provides this service to. This option was designed for another state and is **_not_** used in Washington State.
End Grade	Highest grade level the staff member provides this service to. This option was designed for another state and is **_not_** used in Washington State.

Option	Description
Comments	Comments that are related to the staff member's assignment. This option was designed for another state and is **_not_** used in Washington State.
Staff FTE	The staff members Full Time Equivalent percentage. This option was designed for another state and is **_not_** used in Washington State.
Bilingual Assignment	Indicates if the staff member provides bilingual services in the program. This option was designed for another state and is **_not_** used in Washington State.
Percent Special Ed	The percentage of the staff member's Full Time Equivalent that is dedicated to the Special Education department. This option was designed for another state and is **_not_** used in Washington State.
Buildings Served	Number of buildings in which the staff member provides the Service. This option was designed for another state and is **_not_** used in Washington State.

Table 27 – Staff Assignment Maintenance options

Configuring District Services

District Services start with the programs and related services that were configured in the Programs and Services section. You can add additional information such as the location, the operational period, as well as start and end dates of the program or service and other unique information. Start and end dates are defined to cover a complete school year. Staff is then assigned to the services after configuring the District Service.

These District Services are then attached to students' IEPs to become their Placement Records that define the programs and related services as part of their IEPs.

Creating a District Service

When you create a District Service, you must select a Special Service ID from the list of Programs and Services. You can also add a Program Code and Sequence Code to the Special Service ID to identify a unique District Service. This combination of the Special Service Code, Program Code, and Sequence Code, which makes up the District Service, is what you select when adding a Placement to the student's IEP. You can configure all services provided to students, including those provided within your district and services provided outside the district.

To create a District Service:

1. Go to Student Management/Student Services/SE Setup/CF/DS.

2. Verify the school year at the top of the screen.

3. Do one of the following:

   - If the year is incorrect, click School Year on the right of the list to select the correct school year for the service.

   - If the year is correct, click Add.

4. Configure the District Service Maintenance screen (Figure 68). Table 28 describes the options on this screen.
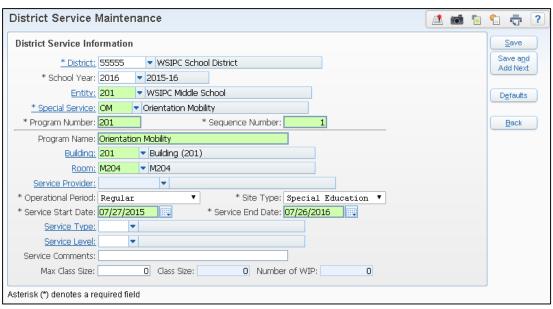
5. Click Save or Save and Add Next.

Figure 68 – District Service Maintenance screen

Option	Description
District	District Number of the district where the service is provided. Most of the District Services are identified with your district number.
School Year	School year the Special Education Service is being provided in. When adding a Special Education Service, you must add it to the current school year and the next school year or add it to the current school year and then use the Clone option to add the District Service to the next year.
Entity	Entity where the service is provided.
Special Service	The program or related service ID configured in the Service and Programs section. To learn more about the Service ID, see "Configuring Services and Programs" (page 161).

Option	Description
Program Number	Four-character alphanumeric identifier that is used in conjunction with the Special Service and Sequence Number to create a unique service. This value is district-defined. Many districts use the Entity ID as their Program Number because it is included on all reports relating to Placements whereas the Entity is not always included.
Sequence Number	A three-digit number used in conjunction with the Special Service and Program Number to create a unique service. This value is district-defined.
Program Name	Displays the description of the Special Service that was selected.
Building	The building in your district where the service is provided. For services provided within your district, you must enter a value in the Building box. Either Building or Service Provider is required for all District Services.
Room	Indicates the room the service is provided in.
Service Provider	Name of the provider or facility *outside your district*. For example, this could be a rehabilitation facility or a clinic providing Physical Therapy. The provider or facility must be added to the district Name Table prior to selecting for a District Service. We suggest these are added with a Name Type of "Health Professional" so they are easy to find in the list of names. Either Service Provider or Building is required for all District Services.

Option	Description
Operational Period	Indicates the operational period of the service. ▪ Regular indicates programs and services during the Regular School Year. ▪ Extended indicates ESY Services. ▪ Summer indicates during summer school programs.
Site Type	Defines whether or not the site is Special Education or Regular Education.
Service Start Date	The first day the service is available to place on students' records. This can be the first day of school, or a day during the summer such as August 1st. If you are placing students during the summer, enter a date that will allow you to enroll the student in the service. If you try to enroll the student before the Service Start Date, an error message appears.
Service End Date	The last day the service is available to place on students' records. This can be the last day of school, or a day during the summer such as July 31st.
Service Type	This option was designed for another state and is *not* used in Washington State.
Service Level	This option was designed for another state and is *not* used in Washington State.
Service Comments	Free-form comments or notes about the service.
Max Class Size	Maximum number of students who should be enrolled in the service. This option is informational only and does not prevent students from being enrolled in the service.
Class Size	Number of students who are enrolled in the service.
Number of WIP	Number of students enrolled in the service with IEPs marked WIP. These students aren't included in the Class Size total.

Option	Description
Defaults	Allow the user to set up defaults for the following service fields: ▪ District ▪ School Year ▪ Entity ▪ Building ▪ Operational Period ▪ Site Type ▪ Service Start Date ▪ Service End Date

Table 28 – District Service Maintenance options

Assigning Staff to a District Service

After you create the District Service, you can assign a staff member to it to identify who is providing the service. You must indicate the staff member as Primary if you want to use the Update IEP/Case Manager Utility to assign IEP Manager or Case Manager to your students with the staff assigned to their Primary Placement.

Note	If you do not assign a staff member to the District Service and mark them as the Primary Teacher, the Primary Teacher column on the District Services list displays "Teacher Not Assigned."

To assign Staff to a District Service:

1. Go to Student Management/Student Services/SE Setup/CF/DS.

2. Click the arrow next to the District Service you want to assign Staff to.

3. Click Add Staff next to Staff Assignment.

4. Configure the Staff Assignment Maintenance screen (Figure 69). Table 29 describes the options on this screen.

5. Click Save.

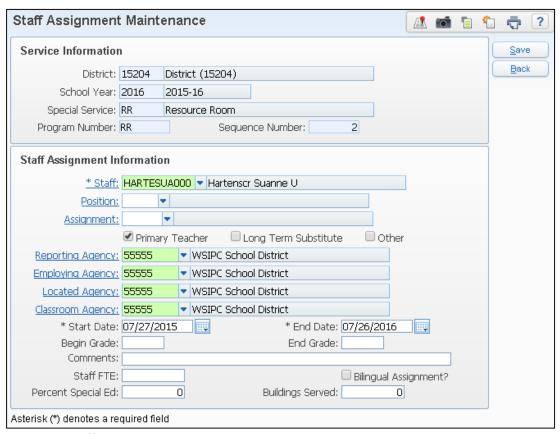| Note	Since students' IEPs and Placements can span more than one school year, you must maintain District Services for the current *and* next school year. If District Services and Special Education Staff Records are not created and maintained for the next school year, students will not have Placements automatically created for the next school year.

Figure 69 – Staff Assignment Maintenance screen

Option	Description
Staff	Staff member's Namekey.
Position	Staff member's position. This option was designed for another state and is *not* available for Washington State Reporting.
Assignment	Primary role the staff member plays in Special Education, such as Case Manager, Secondary Teacher, or Teacher Manager. This option was designed for another state and is *not* available for Washington State Reporting.
Primary Teacher	Determines whether the staff member is the Primary Teacher for this Service. If the staff member is marked as Primary Teacher on the Service, the staff member's name appears on the District Service list. To learn how to run the Update IEP/Case Manager Utility to populate students' Case Manager and/or IEP Manager fields with their Primary Teacher, see "Update IEP/Case Manager Utility" (page 117).
Long Term Substitute	Determines whether the staff member is a long term substitute. This option was designed for another state and is *not* used in Washington State.
Other	Determines whether the staff member is not the Primary Teacher. This option was designed for another state and is *not* used in Washington State.

Option	Description
Reporting Agency	District that reports the staff member to the State. This option was designed for another state and is *not* used in Washington State.
Employing Agency	District that employs the staff member. This option was designed for another state and is *not* available on Washington State Special Education Reports.
Located Agency	District where the service is provided. This option was designed for another state and is *not* used in Washington State.
Classroom Agency	District responsible for the classroom. This option was designed for another state and is *not* used in Washington State.
Start Date	Start date of the staff member's assignment to the service. Typically, the Staff Assignment Start Date aligns with the District Service's Begin Date, unless the staff starts after the first day of school. Figure 69 shows an example where District Service SLP/201/0 is assigned to Suanne with a Begin Date of 8/26/2014, the same date as the staff member's Assignment Start Date.
End Date	End date of the staff member's assignment to the service. Typically, the Staff Assignment End Date aligns with the District Service's End Date, unless the staff plans to leave during the School Year. Figure 69 shows an example where District Service SLP/201/0 is assigned to Suanne with an End Date of 6/17/2015, the same date as the staff member's Assignment End Date.

Option	Description
Begin Grade	Lowest grade level the staff member provides this service to. This option was designed for another state and is *not* used in Washington State.
End Grade	Highest grade level the staff member provides this service to. This option was designed for another state and is *not* used in Washington State.
Comments	Comments that are related to the staff member's assignment. This option was designed for another state and is *not* used in Washington State.
Staff FTE	The staff members Full Time Equivalent percentage. This option was designed for another state and is *not* used in Washington State.
Bilingual Assignment	Indicates if the staff member provides bilingual services in the program. This option was designed for another state and is *not* used in Washington State.
Percent Special Ed	The percentage of the staff member's Full Time Equivalent that is dedicated to the Special Education department. This option was designed for another state and is *not* used in Washington State.
Buildings Served	Number of buildings in which the staff member provides the Service. This option was designed for another state and is *not* used in Washington State.

Table 29 - Staff Assignment Maintenance options

Viewing Active Students in a District Service

You can view all active students placed in a District Service in two different ways: in a list view or in a browse view.

Viewing Active Students in a List View

The list view is a quick display of the students placed in a District Service.

To view active students in a District Service in a list view:

1. Go to Student Management/Student Services/SE Setup/CF/DS.

2. Expand the District Service Record you want to view.

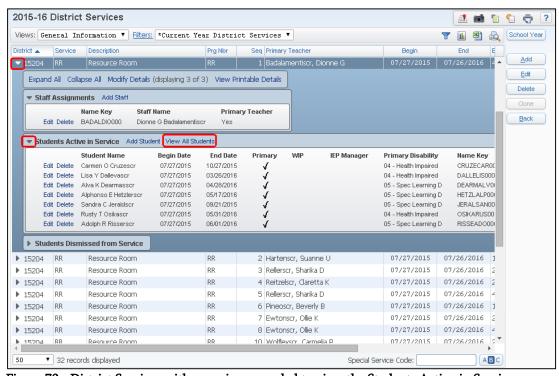3. Expand the Students Active in Service area (Figure 70).

Figure 70 – District Services with a service expanded to view the Students Active in Service

Viewing Active Students in a Browse View

You can also view all active students placed in a District Service using a browse view. This gives you the same options that are common to any browse view, such as the Export Options. To learn more about browse views, see the *WSIPC Guide to Skyward's School Management System*.

To view all active students placed in a District Service in a browse view:

1. Go to Student Management/Student Services/SE Setup/CF/DS.

2. Expand the District Service Record you want to view.

3. Click View All Students next to Students Active in Service.

Viewing Dismissed Student in a District Service

You can also view students who have been dismissed from a District Service using the District Services List.

To view dismissed students in a District Service:

1. Go to Student Management/Student Services/SE Setup/CF/DS.

2. Expand the District Service Record you want to view.

3. Expand the Students Dismissed from Service area.

Configuring Event Auto Emails

Event Auto Emails are triggered based on the event selected in the configuration setup. The email pertaining to a student is created when the event occurs. The email is sent to the individuals configured in the setup. Recipients receive one email per student when the event occurs. Events correspond to a number of different activities that occur within the Special Education module, such as when a student is added to, or exited from, the Special Education module.

In the Special Education module, you can create Event Auto Emails for the following Special Education Events:

- Student is Added to Special Education
- Student was Exited from Special Education
- New Evaluation is Created
- New IEP is Created
- Evaluation is Locked
- IEP is Locked
- Evaluation is Set as WIP
- IEP is Set as WIP
- Evaluation is Set to Waiting for Approval
- IEP is Set to Waiting for Approval
- Evaluation is Approved
- IEP is Approved
- Eval Form is Set to Waiting for Approval
- IEP Form is Set to Waiting for Approval
- Eval Form is Set to Approved
- IEP Form is Set to Approved
- Special Education Meeting is Created
- Special Education Meeting Time/Date Changed
- Special Education Meeting Deleted

Note	There are two additional Event options under the Enrollment Changes Event Type, which are related to Special Education students:

- Student Entered and Spec Ed Records Exist
- Student Withdrew and Spec Ed Records Exist

Enrollment Changes Event Types must be configured by someone with access to Student Management\Advanced Features\AE. To learn how to configure these additional auto email events, see the *WSIPC Guide to Advanced Features.*

When creating an Event Auto Email, you select a range of students for which the Auto Email should be sent. When you create an Auto Email while signed in to Entity 000, you set the Range Options as part of configuring the Auto Email. If you are signed in to an individual Entity, you first create the Event Auto Email, and then edit the record to configure the Student Range options separately. An Event Auto Email created from an individual Entity only includes students enrolled in that Entity.

Best Practice	Configure Event Auto Emails at the district level since Special Education is a district-wide module.

To configure Event Auto Emails:

1. Go to Student Management/Student Services/SE Setup/CF/EE.

2. Verify that you're signed in to Entity 000. Click Add to the right of the browse list.

3. Configure the Automated E-mail Maintenance screen (Figure 71). Table 30 describes the options on this screen.

4. Click Next.

Note	The Next button only appears when you are adding an Event Auto Email while signed in to Entity 000.

5. Configure the Student Ranges area of the Automated E-mail Maintenance screen (Figure 72). Table 31 describes the options on this screen.
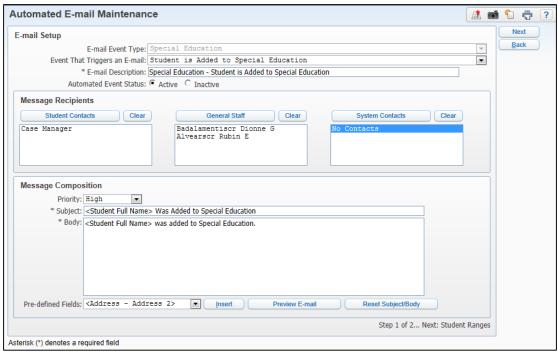
6. Click Save.

Figure 71 – Automated E-mail Maintenance screen

AREA	PURPOSE OF AREA
E-mail Setup	Contains basic information about the Auto Email.

Options in This Area	Description of Options
E-mail Event Type	Defaults to Special Education and cannot be changed.
Event That Triggers an E-mail	List of the events available to trigger the email.
E-mail Description	Defaults to the description of the Event Trigger selected in the previous option. You can modify this description to make it meaningful to the recipients.
Automated Event Status	Active: Emails are generated if the selected event occurs. Inactive: Emails are not generated if the selected event occurs.

AREA	PURPOSE OF AREA
Message Recipients	Allows you to select the recipients of the Auto Email.
Options in this Area	**Description of Options**
Student Contacts	Position Title which equates to a field that can contain a person's name. If a Student Contact is selected, that person is sent the email for any student who qualifies for the email. The advantage of using this type of recipient is that if the person in the box changes, the email is automatically sent to the new person. You don't need to reconfigure the Auto email.
General Staff	Names defined as Staff Type in the district. The staff member selected from this list is always sent the Auto email. If the staff member leaves the district, the Auto Email configuration must be changed to reflect the new staff member's name.
System Contacts	Choose from the following list of System Areas available in Student Management. Emails are sent to the staff members designated as a contact in the area selected. ▪ Attendance ▪ Curriculum ▪ Discipline ▪ Food Service ▪ Grading ▪ Schedule ▪ Student Info System Contacts must be set up in your District before using this option. To learn how to set up system contacts, see the *WSIPC Guide to Advanced Features.*

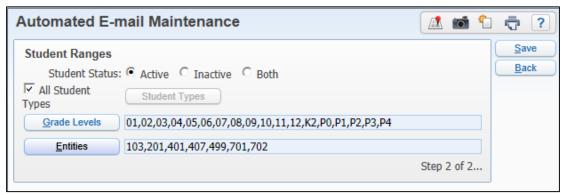| AREA	PURPOSE OF AREA
Message Composition	Allows you to configure how the Auto Email appears to the recipient.
Options in This Area	**Description of Options**
Priority	Message is marked with the selected priority, High or Low.
Subject	Text that prints in the subject line of the email. Defaults to the Event Name selected for the email. You can update the subject text if desired.
Body	Text to describe the event for the students listed in the email. You can use the default text or edit the text as desired.
Predefined fields	Lists fields of information from the database that can be included in the different parts of the email.
Insert	Inserts the selected Predefined Field where the cursor is positioned.
Preview E-mail	Allows you to preview the email you have configured.
Reset Subject/Body	Resets the Subject and Body of the email to the defaults.

Table 30 – Automated E-mail Maintenance options

Figure 72 – In Entity 000 the Student Ranges area determines which students are included in Event Auto Email

Option	Description
Student Status	Specifies whether Active students, Inactive students, or Both are included in process.
All Student Types Student Types	Specifies students for inclusion by their Student Type Code. To learn more about Student Type Codes, see the *WSIPC Guide to Student Demographics and Families*.
Grade Levels	Specifies the Grade Levels of students to include in process.
Entities	Determines the Entities that are included in the process

Table 31 – Student Ranges options for Automated E-mails

Configuring Nightly Auto Emails

The Nightly Auto Emails process runs on a regular basis and looks through Special Education data to determine which students match the configuration set up by your district. If data for any student fits within the parameters for the Target Date, an email is sent to the individuals configured in the setup. The process looks at specific date fields in the student's Special Education data and compares the Target Date with the current system date. If the time period selected in the configuration for the Target Date has occurred, the student is included in the email. Recipients receive a single email per Target Date with a list of students who meet the trigger parameters for that date.

Below is a list of the available Target Dates:

- Start Next Evaluation
- Start Next Evaluation Past Due
- Next Evaluation
- Next Evaluation Past Due
- Case Due
- Case Due Expired
- IEP Review
- IEP Review Past Due
- IEP Expiration
- IEP Expiration Past Due
- New Evaluation Created
- New IEP Created
- Special Education Meeting

Each Target Date is configured separately. For example, a district may want to notify the IEP Managers when their students' IEPs are about to expire. They want to be notified twice, once 45 days before the IEP expires and again 15 days before the IEP expires. There is also an option that allows you to set up when the Nightly Auto E-mails are scheduled to run.

To configure nightly auto emails:

1. Go to Student Management/Student Services/SE Setup/CF/AE.

2. On the Nightly Auto Email Setup screen, click Add.

3. Select the Target Date you want to configure.

4. Configure the Auto Email Trigger Configuration screen (Figure 73). Table 32 describes the option on this screen.
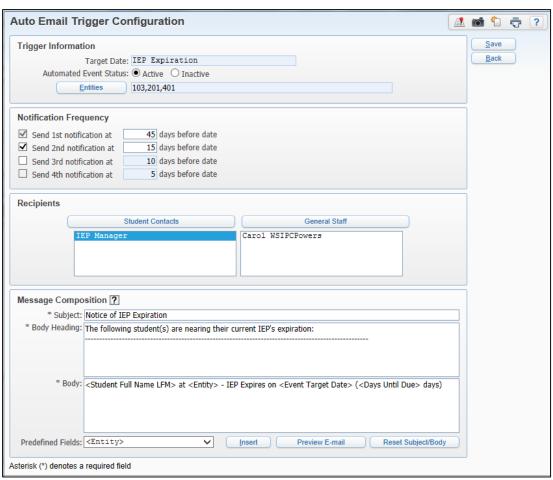
5. Click Save.

Figure 73 - Auto Email Trigger Configuration screen

AREA	PURPOSE OF AREA
Trigger Information	Contains basic information about the Nightly Auto Email

Options in This Area	Description of Options
Target Date	Indicates the date field in the student's records to use for triggering the email. Target Dates can be selected for dates that are "coming due" to serve as reminder emails or for dates that are "past due." The type of Target Date selected determines what type of Notification Frequency is available to configure.
Automated Event Status	Active means emails are generated if the selected Target Date occurs. Inactive means that the emails will not be generated if the selected Target Date occurs.
Entities	Indicates which Entities are included when selecting students to examine their Special Education data for the specific Target Date selection.

AREA	PURPOSE OF AREA
Notification Frequency	Determines the Target Date qualifier for the Auto Email

Options in this Area	Description of Options
For "coming due" Target Dates	Indicates the number of notifications to send to the recipients and at what intervals. The first notification should be sent the furthest out from the Target Date selected and the second the next furthest out and so on, in a countdown sequence. In the example in Figure 69, the first email is sent 45 days prior to the Target Date and the second email is sent 15 days prior to the Target Date. The third and fourth emails are not sent as they are not selected.

Options in This Area	Description of Options
For "past due" Target Dates	Indicates how frequent the "past due" notification is sent. Options are Daily, Weekly, or Monthly. **Notification Frequency** Send PAST DUE notification: None ▼

AREA	PURPOSE OF AREA
Recipients	Allows you to select the recipients of the Nightly Auto Email

Options in This Area	Description of Options
Student Contacts	Position Title which equates to a field that can contain a person's name. If a Student Contact is selected, that person is sent the email for any student who qualifies for the email. The advantage of using this type of recipient is that if the person in the field changes, the email is automatically sent to the new person. You don't need to reconfigure the Auto email.
General Staff	Names defined as Staff Type in the district. The staff member selected from this list is always sent the Auto email. If the staff member leaves the district, the Auto Email configuration must be changed to reflect the new staff member's name.

AREA	PURPOSE OF AREA
Message Composition	Allows you to configure how the Nightly Auto Email appears to the recipient
Options in this Area	**Description of Options**
Subject	Text that prints in the subject line of the email. Defaults to "Notice of target date selected."
Body Heading	Text to describe the Target Date selected for the students listed in the email. You can use the default text or edit the text as desired.
Body	Text about each student listed for the event. You can use the default text or edit the text as desired.
Predefined fields	Lists fields of information from the database that can be included in the different parts of the email.
Insert	Inserts the selected Predefined Field where the cursor is positioned.
Preview E-mail	Allows you to preview the email you have configured.
Reset Subject/Body	Resets the Subject and Body of the email to the defaults.

Table 32 – Auto Email Trigger Configuration options

Scheduling Nightly Automated E-Mails

The default setting for the schedule of the Nightly Auto E-mails is 6:00 pm, Monday through Friday starting with the day of configuration and running September through May. You can change the configuration of these options as well as set additional options. Figure 74 is an example of the Nightly Auto E-mail Setup screen with the default schedule settings displayed.

To schedule nightly automated emails:

1. Go to Student Management/Student Services/SE Setup/CF/AE.

2. Click Edit in the top section of the screen.

3. Configure the Scheduled Task Maintenance screen. To learn more about scheduled tasks see the *WSIPC Guide to Skyward's School Management System.*

4. Click Save.

Note	The same schedule applies to all of the Nightly Auto E-mails that you have configured. They all run as one task.

You can also initiate the task immediately by clicking the Run Now button. The task is sent to the Print Queue for processing and when it has completed the results are listed in the Process History area of the screen (Figure 74).

Viewing Process History

Every time the Nightly Auto E-mails Scheduled Task runs, the activity is logged in the Process History area of the screen (Figure 74). This allows you to see every time the Auto E-mail has completed with the date, time and results.
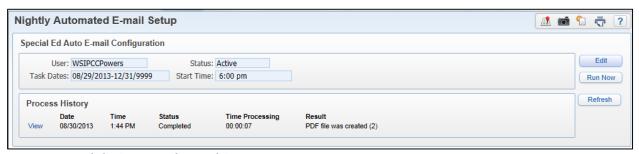

Figure 74 - Nightly Automated E-mail Setup screen

Configuring Special Education Custom Forms

Custom Forms are screens used to collect and track information for students and families when there is no designated place to enter the data already in the software. Once a custom screen is created, you can then edit the screen and enter the information from either the Special Education Student Profile or Special Education Entry by Student. You can also report on the data contained in Custom Forms using Data Mining.

Before you can use a Special Education Custom Form, you must configure the following areas:

- Custom Forms Setup
- Custom Form Security

Custom Forms Setup

To add a Custom Form, you must configure the following areas:

- Adding a Custom Form Record
- Adding Custom Fields
- Adding and Designing a Custom Screen

Adding a Custom Form Record

The first step in configuring Custom Forms is to add a Custom Form Record.

To add a Special Education Custom Form Record:

1. Go to Student Management\Student Services\SE Setup\CF\CS.

2. On the Custom SpecEd Forms screen, click Add.

3. Configure the Form Maintenance screen (Figure 73). Table 33 describes the options on this screen.

4. Click Save or Save And Go To Next Step.
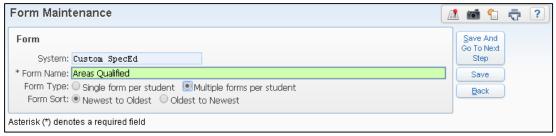
5. Continue to "Adding Custom Fields" below.

Figure 75 – Form Maintenance screen

Option	Description
System	This field is not editable. Verify that you are creating the form for the correct system module.
Form Name	Enter the name of the Custom Form.
Form Type	Choose the way the form will function. Once the form is saved this cannot be modified. ▪ Single Form per Record: Single screen can be edited each time. ▪ Multiple Forms per Record: Multiple screens can be attached to one student, each of them will have the same set of fields.
Form Sort	Only available when Multiple Forms per Record is selected. Each copy of the form is date and time stamped. ▪ Newest to Oldest: Lists the most recent copy at the top of the screen. ▪ Oldest to Newest: Lists the earliest copy of the form at the top of the screen.

Table 33 – Options on Form Maintenance screen

Adding Custom Fields

Once a Custom Form Record is created, Custom Fields are selected and added to display on the form.

To add Custom Fields to a Custom Form:

1. Go to Student Management\Student Services\SE Setup\CF\CS.

2. If you created the Custom Form Record without going to the next step, you must expand the Custom From on the main screen and then click Add Field on the Custom Fields tab (Figure 76).

3. Configure the Field Maintenance screen (Figure 77). Table 34 describes the options on this screen.

4. Click Save and Add Another Field until all the district defined fields have been created. Then click Save or Save and Go to Next Step.

5. Continue to "Adding and Designing a Custom Screen" below.

Figure 76 – Custom SpecEd Forms main screen showing expanded Form Record

Figure 77 - Adding a Custom Field- Field Maintenance

Option	Description
Form	This field is not editable. Displays the area and form name for the Custom Form you are working with.
*Label	Enter the name of the field. It will be used on the custom screen and in Data Mining.
Data Type	The type of data that will be entered into the field. Available options are: ▪ Character ▪ Date ▪ Decimal ▪ Integer ▪ Logical ▪ Lookup ▪ Read Only Text
Format	Displays based on the Data Type chosen.
Tool Tip	Information entered appears as a pop-up screen when the mouse is paused over the field on the custom screen. Additional details that explain more about the field can be entered.

Option	Description
Initial Value	Choose how the field should appear or what the default value should be when it is accessed for the first time. Available options are: ▪ Blank ▪ Skyward Field ▪ User Defined
Read Only	If selected, users can not edit the field.
Required	If selected, entry is required to save the screen.
Do Not Allow Zero	Integer other than zero must be used. Only available if Required is selected.
Calculated Field	If selected, a field is activated to enter a formula.

Table 34 - Field Maintenance- Options when adding a new Field

Adding and Designing a Custom Screen

Once the Custom Fields are selected, you design the screen.

To add a Special Education custom screen:

1. Go to Student Management\Student Services\SE Setup\CF\CS.

2. If you created the Custom Fields without going to the next step, you must expand the Custom Form on the main screen and then click Add Screen on the Custom Screens tab (Figure 78).

3. Configure the custom screens to design the layout that users will see as they enter data into the Custom Form (Figure 79). Table 35 describes the options on this screen.

4. Click Save.

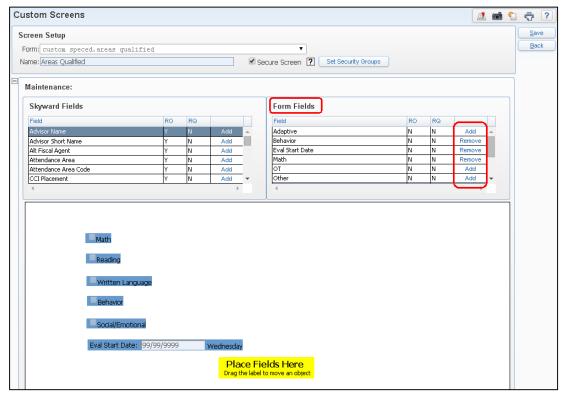Figure 78- Custom SpecEd Forms main screen- Expand Form and click Add Screen

Figure 79 - Custom Screens - Designing the screen using the newly created fields

Option	Description
Form	This field is not editable. Displays the area and form name for the Custom Form you are working with.
Name	Defaults to the Form name but can be changed.
Secure Screen	Allows security to be assigned to the screen independently from other custom screens that are not secure.
Set Security Groups	This option is only available if you select the Secure Screen option. Choose the Web Student Management groups you are granting access to.
Skyward Fields	Existing Skyward fields that can be added to the custom screen. Click the Add links to include the fields on the screen. Once selected, a Remove link becomes available.
Form Fields	Custom Fields that were added in the last step. Click the Add links to include the fields on the screen. Once selected, a Remove link becomes available.
Place Fields Here	As Add links are selected, the fields appear in this area. You can then drag the fields to their desired position.

Table 35- Custom Screen design options

Custom Form Security

Security can be assigned to Custom Form screens so that only users with the appropriate security level can view or edit them.

- Securing a custom screen allows you to assign Security Groups who will have access to the custom screen.

- Securing a custom screen restricts access to screens in Student Management and Human Resources to users within the assigned security groups.

- Custom screens can only be seen in Educator Access Plus if the screen is secured and assigned to the user's security group.

To assign security to a Custom Form screen:

1. Go to Student Management\Student Services\SE Setup\CF\CF.

2. Locate the Security Group you want to assign the custom screen to and expand the record.

3. On the Screens tab, click Assign Screens (Figure 80).

4. On the Custom Form Setup Security screens, select the applicable screens (Figure 81).

5. Click Save.

Tip	If the Custom Form screen is not listed for security selection, the option "Secure Screen" was not enabled when the screen was designed. This can be enabled through the Custom screen setup.

To learn more about Custom Forms Security and Setup, see the *WSIPC Guide to Custom Forms in Student Management.*
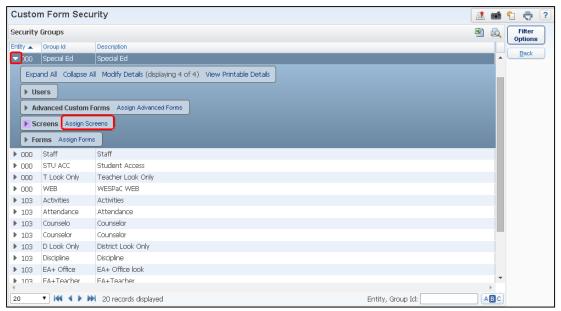
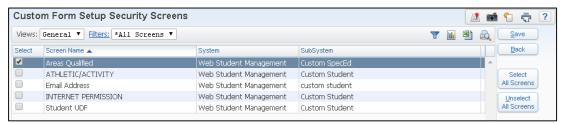Figure 80 - Assigning Custom Form Security

Figure 81 - Choose Custom Form Setup Security screens to assign security to

Using Special Education Student Indicators

Special Education Student Indicators are colored characters that display for a student when certain data exists for that student in the Special Education module. These indicators appear throughout Skyward's School Management System to alert users when a student is qualified for Special Education services.

Special Education Indicators appear in the following modules:

- Student
- Special Education
- Attendance
- Discipline
- Grading
- Scheduling
- Educator Access Plus Profile

Figure 82 is an example of how an Indicator appears on the Entry by Student screen or any of the other browse views available.

Last Name ▲	First	Middle	S*	Gr	GY	DE	Schl	Hmrm	Homeroom Teacher	Birthdate	Age	G	(1) Sc Yr	(1) Inc Nbr
▶ Abtscr	Graham	M	A	05	2020	103	103			10/25/2001	11	M		
▶ Ackerleyscr S	Ezekiel	J	A	04	2021	103	103			04/25/2003	10	M	2011-12	5752
▶ Adderlyscr	Denisha	V	A	03	2022	103	103			04/27/2004	9	F		
▶ Adderlyscr	Lashunda	S	A	01	2024	103	103			02/27/2006	7	F		
▶ Adescr	Margit	T	A	05	2020	103	103			12/24/2001	11	F		

Figure 82 - Discipline Entry by Student - Special Education Indicator display

Figure 83 is an example of how an Indicator appears when viewing the Student Information Profile screen in Educator Access Plus.

Figure 83 – Student Information Profile screen accessed using the Name link in Educator Access Plus

Student Indicators can be configured for a number of different categories. Two of these categories relate to the Special Education data maintained in the Special Education module. Each Indicator category has unique options to define when the indicator appears and to whom.

Note	Student Indicators have to be configured by someone with access to the Advanced Features (Student Management\Advanced Features\AF\AE). To learn how to configure the Student Indicators, see the *WSIPC Guide to Advanced Features.*

Using the Special Ed Disability Indicator

Use the Indicator Category, Student has a Special Ed Disability, to show the indicator for a student who is assigned one of the disabilities selected in the Indicator setup. The Indicator looks for a Disability Code on the Disability tab in the Special Education module.

Using the Special Ed WIP Evaluation or IEP Indicator

Use the Indicator Category, Student has a Special Ed WIP Evaluation or IEP, to show the indicator for a student whose Evaluation or IEP is set to WIP status. The Indicator checks whether the Work in Progress check box is selected on the Evaluation Info and/or IEP Information tab in the Special Education module.

Using the Special Ed Program Indicator

Use the Indicator Category, Student is Enrolled in a Special Ed Program, to display the Indicator for a student who is enrolled in one of the Placements selected in the Indicator setup. The Indicator looks for a Placement Record on the IEP tab in the Special Education module.

| Tip | If the Show Indicator even if IEP is expired option is *not selected*, the Indicator logic also looks at the Placement start and end dates to determine if the Placement is still active. |

Table 36 describes the available configuration selections for Special Education Student Indicators. These are the options you use when working with your District Contact to set up the Special Education Indicators for your district.

| Note | The setup of Special Education Student Indicators has no effect on the option to show the Special Education Bar in Educator Access Plus. The Special Education Bar is controlled by an option in Educator Access Plus\EA Setup\CF\AD. To learn how to configure the Special Education Bar, see the *WSIPC Guide to Educator Access Plus Configuration.* |

Option	Description
Code	Single character code to display as the indicator for the category selected.
Status	Indicates if the indicator is currently Active or Inactive.
Indicator Tooltip	Description of the indicator when a user pauses the mouse pointer over the Indicator Code.
Do not show Indicator in Educator Access Plus	Hides the Indicator from the following: ▪ Class Roster ▪ Post Daily Attendance ▪ Student Info - Profile

Option	Description
Display indicator details for all users	Overrides the default and allows all users who can see indicators to also see the details of this indicator regardless of their security in Special Education.
	By default, users can only see the details of this indicator if they have security access to the IEP tab in the Special Education module.
	Users without this security access can only see the Indicator Category and the Indicator Tooltip.
Show Indicator even if IEP is expired	Continues to display the indicator when the IEP End is prior to the current date.
Show Indicator if student has exited Special Ed	Continues to display the indicator after student has Exited Special Education.
Select Disability Codes	Available for Indicator Category Student has a Special Ed Disability.
	You can select all disabilities or select specific ones.
Select Special Ed Program Codes	Available for the Indicator Category Student is enrolled in a Special Ed Program.
	You can select all Special Ed programs or select specific ones to use.

Table 36 - Special Education Indicator options

Appendix A - Examples of Using the Maintain Student Placements Utility

Using the Utility to Move or Copy Student Placements

You can move or copy student Placement Records from one Special Education District Service to another by selecting the Placement the students are currently assigned to and the Placement the students are moving into. This selection is considered *pairing the Placements* for the utility to use in processing. You can run the utility for just a single pairing or you can select multiple pairings.

This utility is very helpful when you need to *move* students from a District Service in one school to a District Service in another school. You can move students' Placements when the students promote to a different school, such as moving from an elementary school to a middle school or from a middle school to a high school.

Example:
After the Student Year End is completed during the summer, a group of Special Education students who moved to the high school are now in the 9th grade but are still assigned to their Resource Room (RR) Placement from the middle school (with their middle school service provider) on their IEP. Since these 9th grade students are now being served in the high school's Resource Room District Service, their Placement Records must be updated to reflect this change. Typically, once the 9th grade students are moved into their RR Placement at the high school, you don't want the RR Placement Record from the middle school to remain on the student's IEP Record because the student was never served at the middle school in the current school year. This utility has a Delete Current Placement option to delete the current Placement after students are moved to the new Placement.

You can also use the Maintain Student Placements Utility to *copy* students in one Placement to another Placement, leaving both Placement Records attached to the student's IEP.

> *Example:*
> Beverly Pinero is the staff member assigned to Resource Room (RR) in Entity 401 and is retiring on January 15th. You decide not to replace her position, and instead, you split the students between the two other RR services staff, Ollie Ewton and Carmelia Wolfley, in Entity 401. Copying the students to their new RR service instead of moving them, updates the students' IEPs to reflect that they received RR from 9/2/2015 to 1/15/2016 with Beverly Pinero, and from 1/16/2016 to 6/17/2016 with either Ollie Ewton or Carmelia Wolfley.

In many situations, you won't want to move or copy *all* of the students in a particular District Service into a new District Service. The Maintain Student Placements Utility allows you to select which students from the current Placements are processed in the utility two ways. The first way is by ranges you enter, such as Grad Yr/Grade and LRE Code. The second way is by selecting individual students and is used when the group of students you need to select do not have common criteria to fit into the available ranges.

Note	You need to know the District Service information when you select the correct Current Placement and New Placement, including Service, Program, and Sequence numbers. To help you identify the correct Placement, either print a Class List Report (Student Management\Student Services\SE\RE\CL) or write the information down from District Services (Student Management\ Student Services\SE Setup\CF\DS) prior to running the utility.

Scenario

You need to move the Placements for 9th grade students from their middle school District Service in 2015-2016 of RR/RR/3 with Sharika Reller between two high schools in 2015-2016, District Services RR/RR/8 with Ollie Ewton and RR/RR/11 with Carmelia Wolfley.
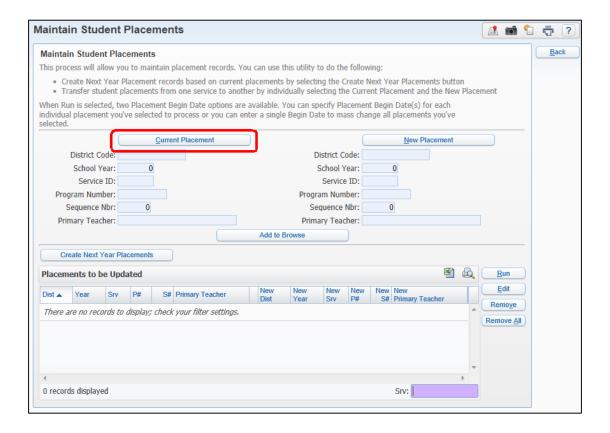
Because the 9th grade students will be split between two different District Services, you complete the move by running the utility two separate times to demonstrate the two different methods of selecting which students are included in the utility.

The first time you run the utility, individual students are selected from 2015-2016 District Service RR/RR/3 with Sharika Reller to move into 2015-2016 District Service RR/RR/8 with Ollie Ewton. The students are Sherrell Eunice, Mose Liguori, and Rolando Hadaway.

The second time you run the utility, you select the remaining 9th grade students from 2015-2016 District Service RR/RR/3 with Sharika Reller to move into to the 2015-2016 District Service RR/RR/11 with Carmelia Wolfley.

First Run: Using the Maintain Student Placements Utility when selecting Individual Students

1. Go to Student Management\Student Services\SE Setup\UT\MP.

2. Click Current Placement.

3. The Current Placements Selection screen appears. Select the Placement the students are currently assigned to and click Select.

   In this example, the 2015-2016 service of RR/RR/3 with Sharika Reller is selected.

Note	District Services for the current school year appear on the Current Placements Selection screen. Click Filter Options to change the school year associated with the District Services available for selection.

4. Click New Placement.

5. The New Placements Selection screen appears and lists the **2016-2017** District Services. Select a District Service from the 2015-2016 School Year and click Filter Options.

6. The Filter Options screen appears. Select Current Year from the drop-down menu and select Apply Filter.

7. The New Placements Selection screen appears with District Services for the 2015-2016 School Year. Select the Placement the students are moving into, and click Select.

In this example, the 2015-2016 service of RR/RR/8 with Ollie Ewton is selected.

8. On the Maintain Student Placements main screen, click Add to Browse.

9. The Placement pair is complete and is listed under the Placements to be Updated list. Click Run.

10. The Maintain Students Placements screen appears. Enter the Placement Begin Date you want on the new Placement Record and select Continue.

   In this example, 9/2/2015 is entered in the Placement Begin Date box.

Tip	If you're processing multiple pairings of Placements and want to change the Begin Date on all placements to the same value, enter the date in the Mass Change All Placement Begin Dates box.

11. The Report Ranges screen appears. Because in this example individual students are selected for this process, ignore the Report Ranges and select Student.

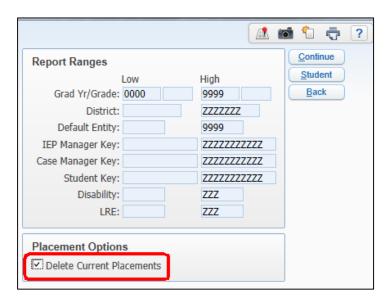12. The following message appears:

13. Click OK.

14. In the Student box on the Individual Selection screen, enter the student's Namekey. Click Add to include the student in the Selected Names list. When all students are selected, click OK.

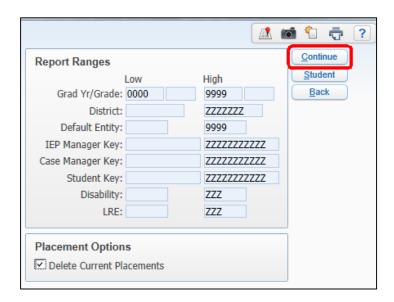| Tip	If you don't know a student's Namekey, select the Student hyperlink to view all students assigned to the Current Placement(s) you selected in step 3. Select the student's record and click Select.

15. The Report Ranges screen appears again. To remove any reference of the students' Current Placement once they've been moved to the New Placement, select the Delete Current Placements check box.

In this example, the students were *not* served by Sharika Reller at the middle school in the *2015-2016 school year*.

16. Select Continue to view a list of students selected to move Placements and check for errors.

17. The request is processed. The Maintain Student Placements Summary list appears. Verify that the correct students are selected to move to the correct New Placement, and then click Process.
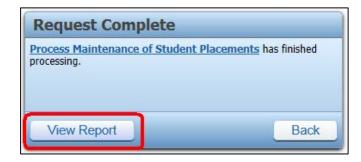
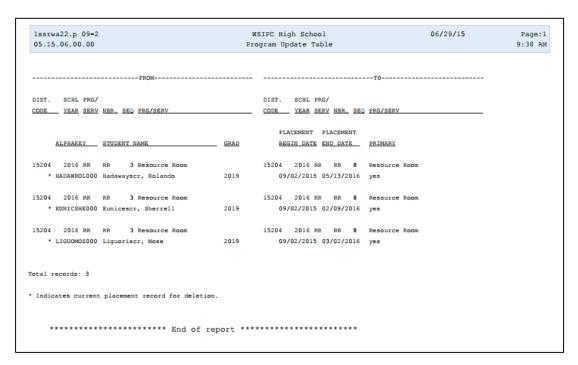| Note | If there are any Student Records that won't be processed during the utility, an Exception button appears on the right side of the screen. Click Exceptions to view the reason a student is not included in the utility. |

18. The following message appears:

19. Click OK.

20. The request is processed through your print queue. When finished, the Request Complete message appears, click View Report.

21. The Program Update Table Report appears, showing which students were moved and which Placements were selected. If students' Current Placements were deleted during the utility, they appear on the report with an asterisk next to them.

Best Practice	Save or print the Program Update Table Report for auditing and historical purposes.

```
1ssrwa22.p 09-2                          WSIPC High School              06/29/15         Page:1
05.15.06.00.00                           Program Update Table                            9:38 AM


-------------------------FROM-------------------------   -------------------------TO-------------------------

DIST.   SCHL PRG/                               DIST.    SCHL PRG/
CODE    YEAR SERV NBR. SEQ PRG/SERV             CODE     YEAR SERV NBR. SEQ PRG/SERV

                                                         PLACEMENT   PLACEMENT
     ALPHAKEY    STUDENT NAME           GRAD             BEGIN DATE  END DATE   PRIMARY

15204   2016 RR   RR    3 Resource Room        15204    2016 RR   RR    8  Resource Room
    * HADAWROL000 Hadawayscr, Rolando   2019            09/02/2015 05/13/2016  yes

15204   2016 RR   RR    3 Resource Room        15204    2016 RR   RR    8  Resource Room
    * EUNICSHE000 Eunicescr, Sherrell   2019            09/02/2015 02/09/2016  yes

15204   2016 RR   RR    3 Resource Room        15204    2016 RR   RR    8  Resource Room
    * LIGUOMOS000 Liguoriscr, Mose      2019            09/02/2015 03/02/2016  yes


Total records: 3

* Indicates current placement record for deletion.


       ************************ End of report ************************
```
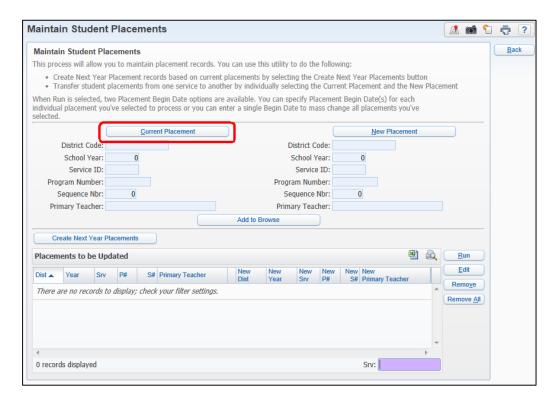
22. After closing the Program Update Table Report, you are returned to the Maintain Student Placements Summary screen. Click Back.

23. Click Remove in the bottom portion of the screen to clear the Placements to be Updated list.

Second Run: Using the Maintain Student Placements Utility by Student Ranges

Note	This scenario continues from the first run, and moves the remaining 9th graders from 2015-2016 RR\RR\3 with Sharika Reller into 2015-2016 RR\RR\11 with Carmelia Wolfley.

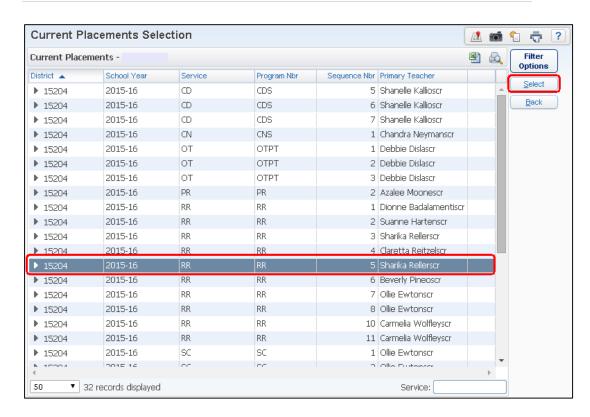1. Go to Student Management\Student Services\SE Setup\UT\MP.

2. Click Current Placement.

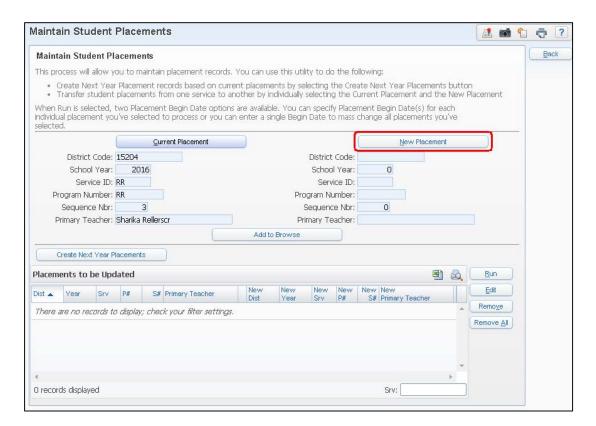3. The Current Placements Selection screen appears. Select the Placement the students are currently assigned to and click Select.

In this example, the 2015-2016 service of RR/RR/3 with Sharika Reller is selected.

Note	District Services for the current school year appear on the Current Placements Selection screen. Click Filter Options to change the school year associated with the District Services available for selection, if needed.

4. Click New Placement.

5. The New Placements Selection screen appears and lists the **2016-2017** District Services. Select a District Service from the 2015-2016 School Year and then click Filter Options.

6. The Filter Options screen appears. Select Current Year from the drop-down menu and click Apply Filter.

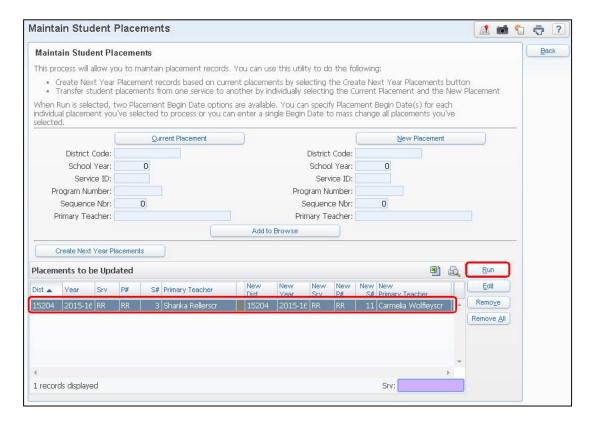7. The New Placements Selection screen appears with District Services for the 2015-2016 School Year. Select the Placement the students are moving into, and click Select.

In this example, the 2015-2016 service of RR/RR/11 with Carmelia Wolfley is selected.

8. On the Maintain Student Placements screen, click Add to Browse.

9. The Placement pair is complete and is listed under the Placements to be Updated list. Click Run.
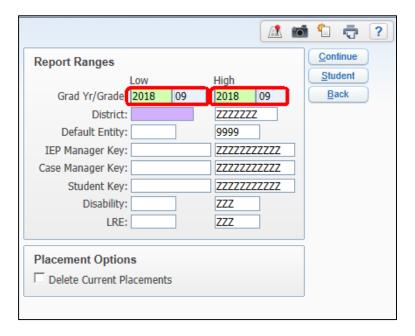

10. The Maintain Students Placements screen appears. Enter the Placement Begin Date you want on the new Placement Record and select Continue.

    In this example, 9/2/2015 is selected.

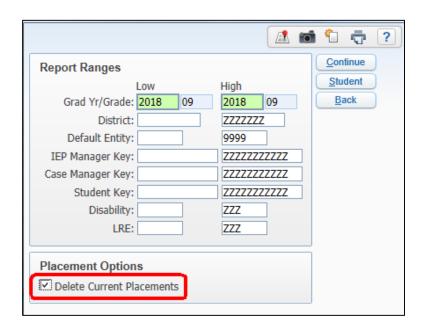 | Tip | If you're processing multiple pairings of Placements and want to change the Begin Date on all placements to the same value, enter the date in the Mass Change All Placement Begin Dates box. |
    |---|---|

11. The Report Ranges screen appears. Because in this example you are selecting the remaining 9th grade students for this process, enter Grad Yr/Grade of 2018 in both the Low and High range boxes.
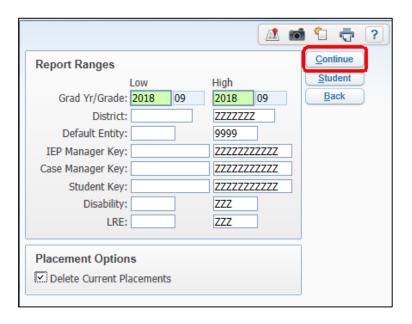

12. To remove any reference of the students' Current Placement once they've been moved to the New Placement, select the Delete Current Placements check box.

In this example, the students were *not* served by Sharika Reller at the middle school in the *2015-2016 school year*.
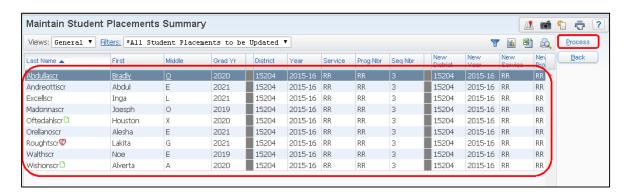
13. Click Continue to view a list of students selected to move Placements, and check for errors.

14. The request is processed. The Maintain Student Placements Summary list appears. Verify that the correct students are selected to move to the correct New Placement, and click Process.

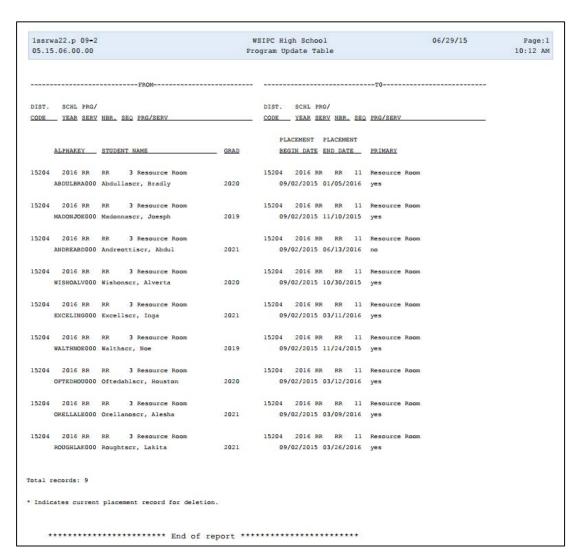| Important	If there are any Student Records that won't be processed during the utility, an Exception button appears on the right side of the screen. Click Exceptions to view the reason a student is not included in the utility.

15. The following message appears:

16. Click OK.

17. The request is processed through your print queue. When finished, the Request Complete message appears, click View Report.

18. The Program Update Table Report appears which shows which students were moved and which Placements were selected. If students' Current Placements were deleted during the utility, they appear on the report with an asterisk next to them.

Best Practice	Save or print the Program Update Table Report for auditing and historical purposes.

19. After closing the Program Update Table Report, you are returned to the Maintain Student Placements Summary screen. Click Back.

20. Click Remove in the bottom portion of the screen to clear the Placements to be Updated list.

Each time you click Process, the utility sends the process to your print queue and a report is created at completion. The report lists all students processed with their "From" or Current Placement and their "To" or New Placement.