



Supporting Student Achievement

**Student Services Full
Individual Education Plan (IEP)
Reference Guide**

Version 1.4
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BCeSIS Implementation Team

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Introduction

It is important to keep in mind that this is a fully integrated Student Services module for maintaining information relative to the decisions regarding, and delivery of, the educational program for students requiring service/support. (Note: While this module meets the requirements of the Special Education Policy; not all current variations in practice that exist in the field may fit with the functionality.) The IEP is only one part of this process and this is where BCeSIS provides a significant advantage over programs designed simply to create an IEP.

The IEP created using the Student Services Full module meets the Ministry of Education requirements. It has the further advantage of creating a history for the student which continues with the student from one BCeSIS school to another. The IEP, by policy, is for one year from its creation. In keeping with this policy, you should **Finalize** an IEP when it is an accurate reflection of the current goals and objectives for the student for the year.

Prior to the use of the IEP function, staff who will be creating IEPs must have:

- A role in Staff Maintenance
- A regular BCeSIS security role
- Be assigned as the Case Manager for the student for whom the IEP is being created

(see Student Services Security Reference Guide for further information).

View/Edit vs Amend

There is considerable confusion about these two IEP functions. To avoid the error of creating multiple versions of essentially the same IEP, especially prior to the implementation of the requested Delete IEP functionality, it is critically important to understand the distinction between the two:

- **View/Edit** does not create a new version of the IEP; whereas
- **Amend** does create a new version.
- **View/Edit** allows changes to be made to the existing IEP data unless the current version of the IEP has been finalized; whereas
- In any new version created using **Amend**, it is not possible to edit any data from previous versions.

The rule of thumb is to continue to make changes to the draft IEP, using **View/Edit**, until the IEP is a reasonably accurate reflection of the goals and objectives for the student for the year (typically completed by the end of September each year). At this point, the IEP should be **Finalized**. If circumstances arise, after an IEP is Finalized, which necessitate minor adjustments to the original data – e.g. a change in the teacher assigned to report on a specific goal, or something like that, **Re-open** the IEP and, using **View/Edit**, make the necessary changes and **Finalize** again. The goal is to have the Finalized BCeSIS IEP, as with the legacy paper version, stand as an historical snapshot of a student's status as of a particular date.

The **Amend** functionality should be used if major changes need to be made to a Finalized IEP – which typically would not be a frequent occurrence. A new version will be created in this instance and it will only be possible to add data. It will not be possible to edit any information entered in a previous version. Once a new version is created using **Amend**, even though it is technically possible to do so, avoid working in a previous version or the historical snapshot will be corrupted and numerous complications will result.

Based on your district policy, you will have a strategy for making changes that ensures an accurate and complete history is maintained for the student - *see the Preparing for NEXT year section of this document for details on how to complete existing reports for the current year while preparing for next year's IEP.*

FOIPPA notification

The data displayed in the screen shots of this document is from a test environment. Although the district and school names are real, all other information (students, parents, teachers, etc.) is scrambled in accordance with the protection of individual information.

1.0 Creating an Individual Education Plan (IEP)

Main Menu > IEP/Services Plan > Add IEP button

To create a new IEP, choose the Add IEP button

The screenshot shows a web application window titled "BC - IEP / Services Plans". At the top, there are several input fields: "HSS" (Houston Secondary), "Homeroom" (No Homeroom), and "Grade" (12). A yellow "Alert" button is visible. Below these are fields for "Pupil Number" (221065), "Usual Last Name" (Clements), "Suffix", "Preferred First Name" (Royal), "Middle Name" (Hans), "Age" (17-08), "Gender" (M), and "Birth Date" (15-JUN-1990). Further down, "Ministry Designation" is set to "Mild Intellectual Disability" and "Case Manager" is "Rashni, Cochrane 90084".

The main section is titled "IEP/Service Plan Summary" and contains a table with the following data:

Number	Date	Next Review Date	Ministry Category	Type
1	20-FEB-2008	20-FEB-2009	Mild Intellectual Disability	IEP

At the bottom of the window, there are four buttons: "Add Service Plan", "Add IEP", "Amend", and "View Details".

For the purposes of this document, we will walk you through the process using an existing sample student IEP following the tabs in the IEP loop.

1.1 Basic Info Tab

BC - IEP Details

MSS Merritt Secondary Homeroom 09H-Zeno, Sisco 20067 Grade 09 **Alert**

Pupil Number 222856 Usual Last Name Aley Suffix Preferred First Name Stacy Middle Name Elizabeth Age 16-02 Gender F Birth Date 24-NOV-1991

Ministry Designation Case Manager Annabelle, Lopez 20072

Physical Disability or Chronic Health Impairment

Basic Info Parents/Guardian Participants Strength... Parent ... Annual ... Goal Pr... Assisti... Adaptat... Services

IEP # 1 Intended Career/Development Program View Course Plan

IEP Type School Completion IEP

IEP Date 12-FEB-2008 + Case Manager Annabelle, Lopez 20072 ?

IEP Review Date 12-FEB-2009 + Determination of Eligibility Date 12-FEB-08

Initial IEP Date Determination of Eligibility 1 - Physical Disability or Chronic Health Imp...

Assistive Technology Provided Ministry Category Physical Disability or Chronic Health Impairment

Status OPEN

You may move backward and forward through the screens of the IEP loop, using the tabs or the Navigation arrows

Finalized By Date Finalized Historical Info Finalize Spell

On this first screen you will need to choose a type for this IEP, whether the student will be working toward School Completion, or whether the student will be expected to follow a path leading to Graduation. This does not draw from the diploma module in main BCeSIS for three reasons:

- The student will not have a diploma assigned if the student has not yet reached grade 10; and
- The schools will have different policies for when a student may be identified as on a path leading to School Completion, therefore, they may use the generic Graduation path until that decision has been made.
- A student in grade 3 may not be on one of the existing grad programs by the time they reach grade 10.

At the time of creation of this IEP, the Case Manager may change the **IEP Date** and the **IEP Review Date**. However, the **Initial IEP Date** will be populated with the date the first version of this IEP was created. Once this date is populated, it cannot be changed even through Amendment, as it is from this date that the 12 month period of the IEP is calculated per Special Education Policy.

Next, there is a box available to check if the student requires assistive technology. When this box is checked, the tab for Assistive Technology will appear along the row of tabs for the IEP. This will enable the Case Manager to enter detailed information about the technology. If left unchecked, that tab does not appear.

The Case Manager will auto populate if you have either:

- Used the School Based Team/Student Review process to assign a Case Manager; or
- Used the “Assign Case Manager” item from the menu, in Student Services module, to assign a Case Manager prior to beginning the IEP

The Eligibility date and Ministry designation will auto populate from the Eligibility Determination which would be done prior to creating an IEP.

1.2 Parents Tab

BC - IEP Details

MSS Merritt Secondary Homeroom 09H-Zeno, Sisco 20067 Grade 09 **Alert**

Pupil Number 222856 Usual Last Name Aley Suffix Preferred First Name Stacy Middle Name Elizabeth Age 16-02 Gender F Birth Date 24-NOV-1991

Ministry Designation Physical Disability or Chronic Health Impairment Case Manager Annabelle, Lopez 20072

Basic Info Parents/Guardian Participants Strength... Parent ... Annual ... Goal Pr... Assisti... Adaptat... Services

Relationship Type Mother
 Name Helga Daynard
 Address 6039 Red Court
 Home Phone (250)555-9002
 Work Phone (250)555-3022
 E-mail Helga.Daynard@someplace.com
 First Language English
 Print Name Only

Select Delete

Finalized By
 Date Finalized

Historical Info Finalize Spell

The parents auto populate from core BCeSIS. However, you may add additional guardians here who may be involved in the care of this student and therefore, involved in the IEP process (e.g. Social Services personnel, Respite Care parents or Group Home parents who play a significant role in the student's life.)

If more than one parent/guardian record exists, the scroll bar will appear

Print Name Only checkbox: This enables the user to put only the parent/guardian name on the final printed IEP.

1.3 Participants Tab

BC - IEP Details

MSS Merritt Secondary Homeroom 09H-Zeno, Sisco 20067 Grade 09 **Alert**

Pupil Number 222856 Usual Last Name Aley Suffix Preferred First Name Stacy Middle Name Elizabeth Age 16-02 Gender F Birth Date 24-NOV-1991

Ministry Designation Physical Disability or Chronic Health Impairment Case Manager Annabelle, Lopez 20072

Basic Info Parents/Guardian **Participants** Strength... Parent... Annual... Goal Pr... Assisti... Adaptat... Services

Participant Name		Position / Relationship
Annabelle, Lopez 20072	? P	Teacher
Brigitta, Helal 20103	? P	Teacher
Casey, Nymark 58044	? P	Vice Principal
	? P	
	? P	

Add Del

Finalized By Date Finalized Historical Info Finalize Spell

Add all participants, staff, parents, and internal/external providers, who are involved in the meeting to develop the IEP. To enter a parent, as a participant, use the **P** button and select the parent(s).

This is a valuable history in terms of who had knowledge of the requirements, and who had the opportunity for input into the IEP requirements.

Position/Relationship can only be selected from the drop down list which consists of positions created for regular BCeSIS. Refer to the document: *Using Staff Roles to populate Positions in Student Services* for more information

1.4 Strengths and Needs Tab

BC - IEP Details

MSS Merritt Secondary Homeroom 09H-Zeno, Sisco 20067 Grade 09 **Alert**

Pupil Number 222856 Usual Last Name Aley Suffix Preferred First Name Stacy Middle Name Elizabeth Age 16-02 Gender F Birth Date 24-NOV-1991

Ministry Designation Case Manager

Physical Disability or Chronic Health Impairment Annabelle, Lopez 20072

Basic Info Parents/Guardian Participants **Strength...** Parent ... Annual ... Goal Pr... Assisti... Adaptat... Services

Strengths

Very good academic student.
 Excellent social and interpersonal skills.
 Works well with others both in class and during free time.
 Is very supportive of other students.

Needs

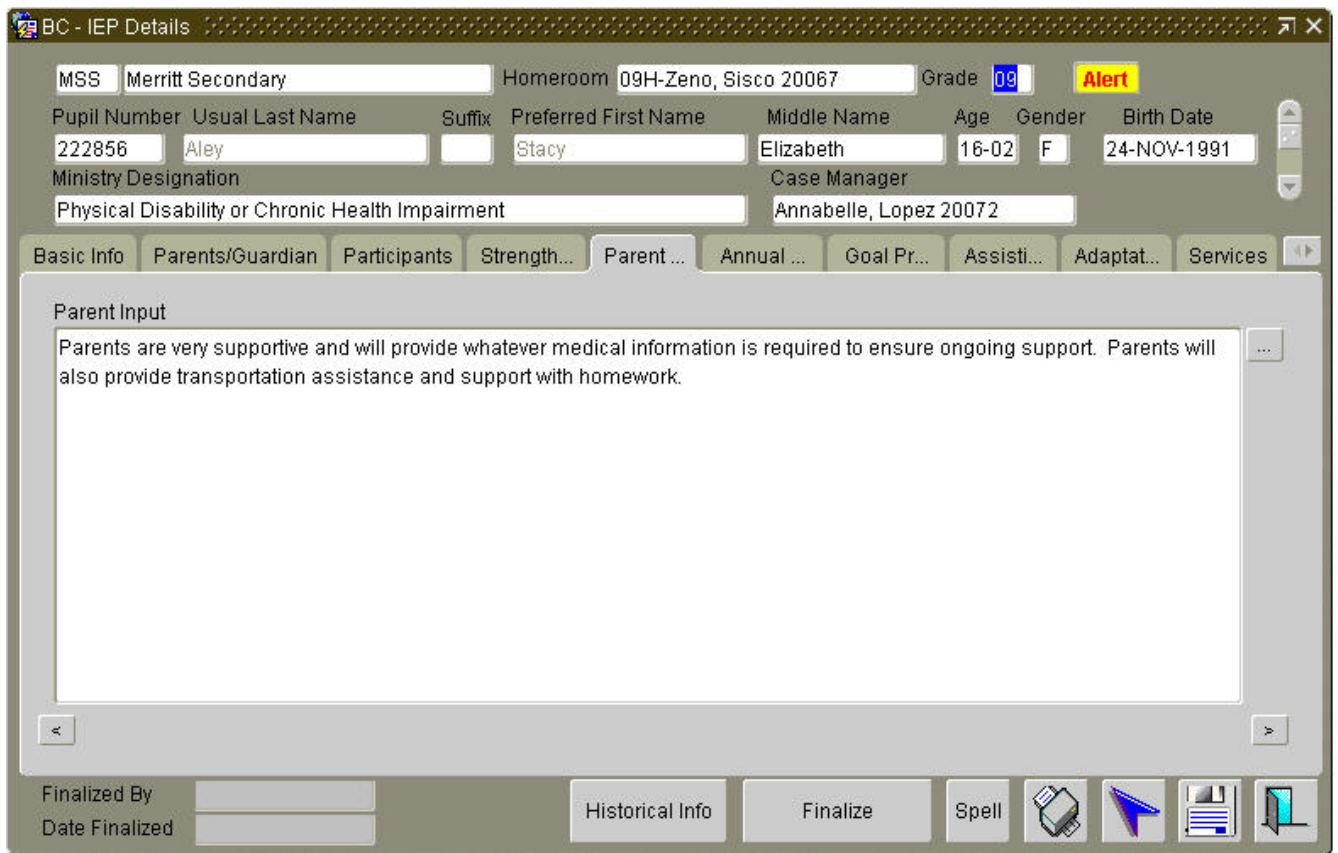
needs a word processor (word recognition would be helpful and will be necessary in future)
 should be allowed to do all written assignments and written sections of tests on a word processor
 requires an adapted physical education program

Finalized By _____ Date Finalized _____

Historical Info Finalize Spell [Printer Icon] [Mouse Icon] [Document Icon] [Monitor Icon]

These text boxes provide ample space to detail this important information. The text editor boxes are the easiest way to enter this information quickly. The box expands as the text is entered so you are able to capture all vital information in either point form or anecdotal form. Your school or district may have a preferred method for entering this information in a consistent manner.

1.5 Parent Input Tab



BC - IEP Details

MSS Merritt Secondary Homeroom 09H-Zeno, Sisco 20067 Grade 09 **Alert**

Pupil Number 222856 Usual Last Name Aley Suffix Preferred First Name Stacy Middle Name Elizabeth Age 16-02 Gender F Birth Date 24-NOV-1991

Ministry Designation Physical Disability or Chronic Health Impairment Case Manager Annabelle, Lopez 20072

Basic Info Parents/Guardian Participants Strength... **Parent ...** Annual ... Goal Pr... Assisti... Adaptat... Services

Parent Input

Parents are very supportive and will provide whatever medical information is required to ensure ongoing support. Parents will also provide transportation assistance and support with homework.

Finalized By Date Finalized Historical Info Finalize Spell

You will note when you view the print version of the document, that there is no Parent Signature space. The document is for the school and district to provide the best educational program for the student. The parent does not have to agree with or sign the document for it to be valid and active. However, it is required that parent input be sought in the creation of the document.

This text box permits you to enter all parent input, even if it is only “declined to participate”. This too creates a valuable history if a parent/guardian later has issue with the educational program being delivered for the student. This screen can also be used to identify the level of participation of the parent(s)/guardian(s) in the development of this IEP.

1.6 Annual Goals Tab

The screenshot shows the 'BC - IEP Details' window with the 'Annual Goals' tab selected. The student's name is Stacy Elizabeth, age 16-02, born 24-NOV-1991. The goal area is 'Physical'. A goal is listed with the statement 'Stacy will be able maintain a level of fitness through an adapted physical education program'. The 'Transition Goal' and 'Discontinued Goal' checkboxes are circled in red. Below the goal, there is a table for 'Short-term objectives for the above goal' with one entry: 'P1.1 Not Yet Initiat... Stacy will be able to participate in PE again and maintain as...'. At the bottom, there are buttons for 'View/Edit', 'Progress Reports', 'Add', 'Del', 'Finalized By', 'Date Finalized', 'Historical Info', 'Finalize', and 'Spell'.

This vital part of the IEP assists in the creation of specific and measurable goals with attached objectives that must have goal progress reports at each school reporting period.

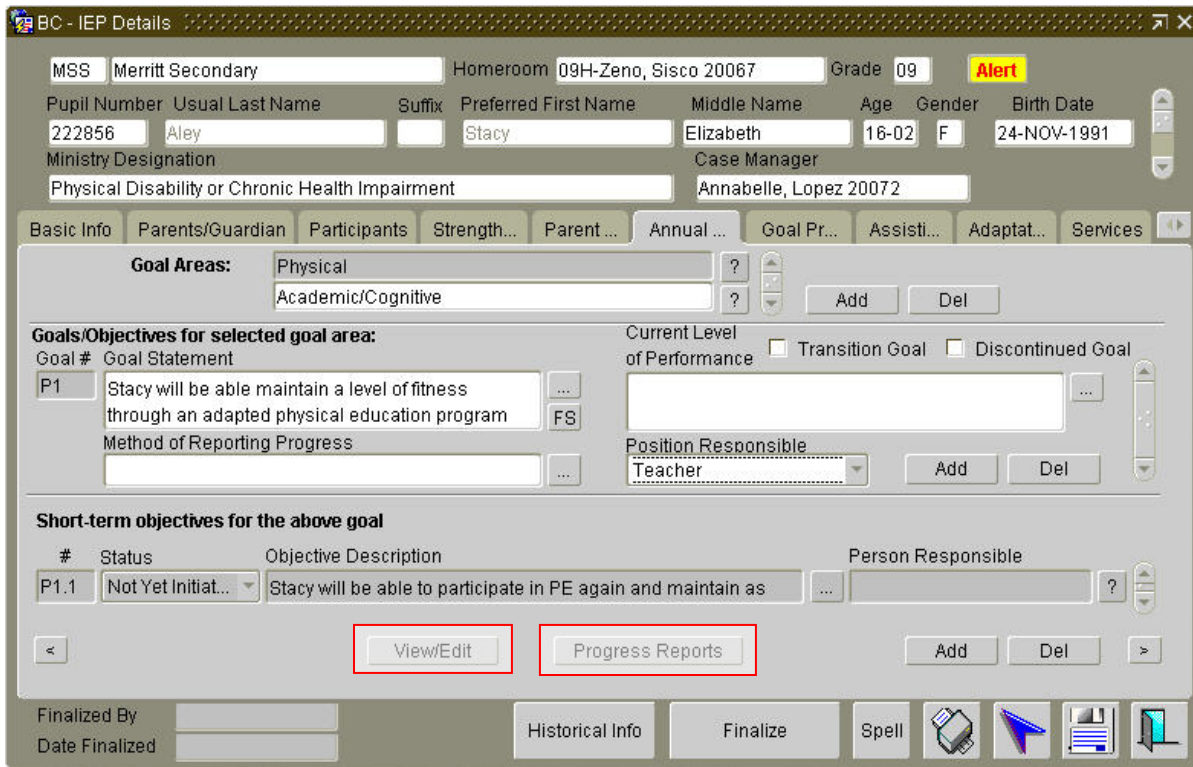
This screen is a little short of space and it should be noted that neither of the following needs to be checked if it is not relevant: “Transition Goal” or “Discontinuation Goal” (see circled items above). However, for students nearing the end of the formal schooling, the “Transition Goal” is a very important marker in determining whether the student has completed all possible educational activities the school has to offer and therefore needs to move to the next step in life.

You may create several **Goal Areas** if a student has multiple needs. Within each goal area you must then create at least one goal. For each goal you must create at least one objective. You may create more than one goal for each area and more than one objective for each goal as necessary to clearly define what the student is expected to achieve.

One of the requirements for each goal is that it be measurable. The field under the goal requires that the method of measurement for that goal be entered (**Method of Reporting Progress**). In the next field enter the position responsible for that measurement.

There is a text box above this position which allows for the entry of information on the current performance level of the student relative to this goal which provides a baseline for the ensuing progress reports.

Finally, at the bottom of the screen, there are the fields for the objectives. Again, the text editor is the most efficient way of entering the information. The Progress Reports required for each school reporting period are based on the objectives; therefore each objective should have a specific person assigned to it.



The screenshot shows the 'BC - IEP Details' window for a student named Stacy. The interface includes fields for school (Merritt Secondary), grade (09), and pupil number (222856). It lists goal areas as Physical and Academic/Cognitive. A goal (P1) is defined for maintaining fitness through an adapted program. Below this, a short-term objective (P1.1) is listed as 'Stacy will be able to participate in PE again and maintain as'. The 'View/Edit' and 'Progress Reports' buttons are highlighted with red boxes.

View/Edit: Enables the user to enter more comprehensive information about each objective, see screen shot on next page.

Progress Reports: Once progress reports have been created for a student, they may be viewed from the IEP loop using this button.

Numbering process for goals and objectives:

- Each goal begins with a letter which also identifies with the area – e.g. for goal area Physical, the goals will begin with the letter “P”
- The first goal in that area will be P1, the next P2, etc.
- To relate the objective to the goal, and thus the goal area, the objective begins with P1 and then the number of the objective is identified by the numeral following the decimal – e.g. the first objective for goal P1 is P1.1, the second P1.2, etc.

Student Services - IEP Reference Guide

BC - IEP Details

HSS Houston Secondary Homeroom No Homeroom Grade 12 **Alert**

Pupil Number Usual Last Name Suffix Preferred First Name Middle Name Age Gender Birth Date

221065 Clements Royal Hans 17-08 M 15-JUN-1990

Ministry Designation Case Manager

Mild Intellectual Disability Rashni, Cochrane 90084

Short-term Objectives Details

Objective

Number	Status	Person Responsible	Position	Summary of Progress
A1.1	In progress	Rashni, Cochrane 90084		

Expected Short-term Objective description and expected progress:

a1.1 test

Strategies/Materials

Method of Evaluation

Assistive Technology Provided

If you have not checked the **Assistive Technology** checkbox on the **Basic Info** tab, but assistive technology will be required to meet a specific objective, you may check the **Assistive Technology Provided** box on this screen. Once that is checked, the **Assistive Technology** tab will then be available in the IEP loop.

1.7 Goal Progress Tab

BC - IEP Details

MSS Merritt Secondary Homeroom 09H-Zeno, Sisco 20067 Grade 09 **Alert**

Pupil Number 222856 Usual Last Name Aley Suffix Preferred First Name Stacy Middle Name Elizabeth Age 16-02 Gender F Birth Date 24-NOV-1991

Ministry Designation Physical Disability or Chronic Health Impairment Case Manager Annabelle, Lopez 20072

Basic Info Parents/Guardian Participants Strength... Parent... Annual... Goal Pr... Assisti... Adaptat... Services

Please enter the name of the person responsible for preparing the goal's reports. Staff members selected using the search tool will be able to enter the reports directly into eSIS.

Goal #	Skills/Behavior Goal	Position Responsible	Reporting Frequency	Assigned to:	On-line access
P1	Stacy will be able maintain a level of ...	Teacher	Regular S...	Zeno, Sisco 20067	? <input checked="" type="checkbox"/>
A1	Stacy will be able to maintain her ...	Teacher	Regular S...	Zeno, Sisco 20067	? <input checked="" type="checkbox"/>
					? <input type="checkbox"/>
					? <input type="checkbox"/>
					? <input type="checkbox"/>
					? <input type="checkbox"/>
					? <input type="checkbox"/>
					? <input type="checkbox"/>

Finalized By: _____ Date Finalized: _____

Historical Info Finalize Spell

This screen details the information about who is responsible for the entry of the Goal Progress report and the frequency. **Note:** A check box exists to the right of the person's name. If the person identified with this responsibility is a member of the school staff (most often this should be a classroom teacher), then the box can be checked and that person can enter the Goal Progress report (based on the objectives assigned to that person) directly into the Student Services Module.

Goal # Skills/Behavior Goal Position Responsible

P1 Stacy will be able maintain a level of ... Teacher

A1 Stacy will be able to maintain her ... Teacher

Editor

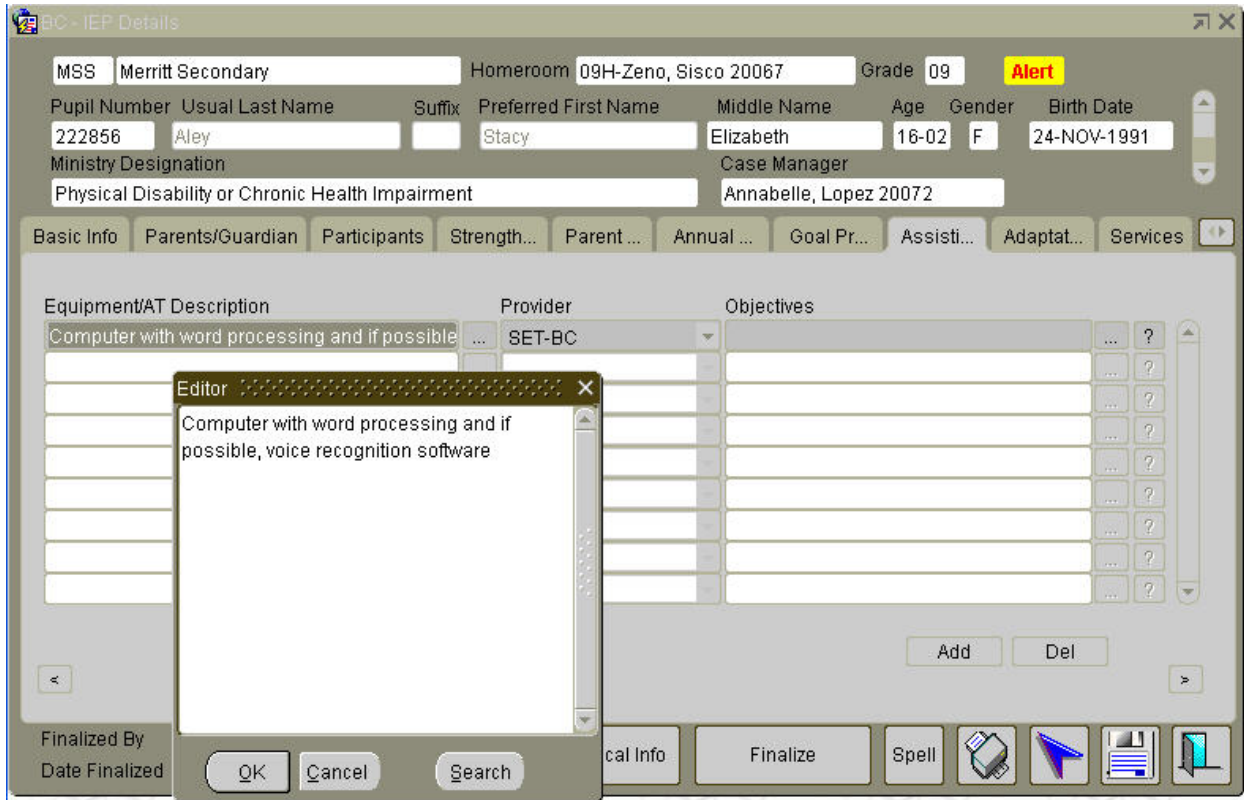
Stacy will be able to maintain her current very strong academic performance with the support of computer equipment for word processing.

OK Cancel Search

Text Editor boxes serve two purposes:

- Enables easier typing of the information; and
- Provides the full description, which is unavailable on the regular screen due to limited space.

1.8 Assistive Technology Tab



Remember this tab will only appear if the box is checked on the **Basic Info tab** or on the **Short Term Objectives Screen**. This screen provides the Case Manager with a simple method of tracking equipment, ensuring they have an accounting of who provided the equipment, and very importantly, what the equipment is intended to add in support of the student's education.

The objectives for the use of the assistive technology can either be chosen using the ? from the objectives in the goal section of the IEP or, using the text editor, you can create additional objectives specific just to the use of the assistive technology.

1.9 Adaptations Tab

This term is not to be confused with the terms used in relation to the level of a course (Modified, Adapted, Regular, Gifted). Those terms will be related to the student's courses or curriculum later in the development of this document. This section allows the Case Manager to enter any further adaptations which will occur within the student's entire environment for accommodation of needs. For example, a student may be participating in the course through a modified version, but still require adaptation to the classroom environment such as alternate seating or a specific type of desk.

The Adaptation Categories and Adaptations can be selected, using the **Select** buttons, from a pre-populated drop down list. If the Case Manager wishes to identify further needs, this can be done using the Other Adaptations box and entering via the text editor.

1.10 Services Tab

BC - IEP Details

MSS Merritt Secondary Homeroom 09H-Zeno, Sisco 20067 Grade 09 **Alert**

Pupil Number 222856 Usual Last Name Aley Suffix Preferred First Name Stacy Middle Name Elizabeth Age 16-02 Gender F Birth Date 24-NOV-1991

Ministry Designation Case Manager Physical Disability or Chronic Health Impairment Annabelle, Lopez 20072

Basic Info Parents/Guardian Participants Strength... Parent... Annual... Goal Pr... Assisti... Adaptat... **Services**

Services

Service	Refused By	Position Responsible	Location	Frequency
	?			
	?			
	?			

View Service reports Add Del

Goals related to the service selected above:

Goal #	Position Responsible	Skills/Behavior Goal Description

Finalized By Date Finalized Historical Info Finalize Spell Select

If the student is receiving additional services, such as support from an itinerant hearing specialist, then this tab is used to identify what services, who is providing the support, and what goals are related to these specific services. If no additional services are required, this tab may be skipped.

Where services are a vital part of the performance of a student in specific goal areas, Service Reports can also be created to define the student's progress at each reporting period, by relating the service to a specific goal.

The **Frequency** of service provides a critical piece of information not only to school and district staff but also in the event of an audit.

View Service Reports: When a service has been assigned, a progress report can be created. This button allows the user to see all service reports created to date.

Additional tabs icon (circled above): Use this to access the list of remaining tabs in the IEP loop or use the navigation arrows at the bottom of the screen.

1.11 Provincial and District Exams Tab

While this tab has the title Provincial and District Exams, it pulls information from the Standardized Test module in regular BCeSIS. Therefore, the choices for **Type** of exam are the same as those in the test module and we do not have the ability to change or limit these choices here (National, Provincial, Assessment, and District). This section can be used to create a history of exams that the student has taken.

Note: If you use the scroll bar (circled above), you are able to access the following three fields:

Participation Code

The selections below appear when you click the arrow to add a participation code

- Student is excluded from the test
- Student will take test with adaptations
- Student will take the regular test

Adaptations for Assessment

If you have entered adaptations in the Adaptations tab, you may use the Select button to populate these fields. If not or if further adaptations are required for the assessments, use the text editor to enter this information.

Explanation Notes

This field may be used to enter any additional information you wish to keep regarding the support provided to the student for exams and assessments.

1.12 Considerations Tab

This tab contains a significant check box relative to audit requirements: Parent Input. It does not contain text or other information about Parent Input (see section 18 for further information on how to document Parent input), but it stores an acknowledgement that parent input has been sought as required:

BC - IEP Details

LKE Lake Kathlyn Elementary School Homeroom D4-Katia, Rodriguez 60050 Grade 07 **Alert**

Pupil Number 220421 Usual Last Name Alkema Suffix Preferred First Name Rand Middle Name Dylen Age 11-10 Gender M Birth Date 28-JUN-1996

Ministry Designation Learning Disability Case Manager Katia, Rodriguez 60050

Strengt... Parent ... Annual ... Goal Pr... Adaptat... Services Provinc... **Conside...** Program... Enclosu...

Acknowledgements

The parent(s)/guardian was offered the opportunity to be consulted about the preparation of the IEP

Other Considerations

The student's parent(s) declined to participate

The student was offered the opportunity to be consulted about the preparation of the IEP

A program consultation offer was made

Other

Finalized By _____ Date Finalized _____

Historical Info Finalize Spell [Printer Icon] [Mouse Icon] [List Icon] [Window Icon]

1.13 Programs/Courses Tab

This is another powerful section of this IEP. It is linked to regular BCeSIS for courses (or curriculum if this is an elementary student and the school is using curriculum). The Case Manager is able to identify each course the student is taking and how that course is being taken (Modified, Adapted, Regular, or Gifted). **Note: The user can Add or Delete courses (or curriculum) in this screen, but these changes will not be reflected in regular BCeSIS. The change process only translates in one direction: from regular BCeSIS to Student Services. Changes of any kind in Student Services do not translate back to regular BCeSIS.**

When a change is made to the student’s courses in core eSIS after an initial IEP for that year has been created, the change does not appear in this window. However, the change in courses will appear by choosing the **Select** button next to the course window.

For curriculum, even though you assign curriculum to a staff member in Staff Maintenance, it does not limit the curriculum choices in the IEP for that staff member’s students as curriculum is attached to the teacher not to the student. You have to filter the curriculum for the student using the **Select** button next to the course window.

For each course, the Case Manager would use the **Select** button next to the Adaptations fields and choose from the Adaptations already created in the previous tab. Likewise, in the Goal section, the **Select** button would be used to choose from the Goals created earlier in the IEP process.

The teachers responsible for educating this student in each of these courses would then be able to see the complete information on adaptations required, if any, and the goals and objectives that student is working toward in his/her class. Each teacher would then be able to report progress on those goals and objectives at the reporting periods.

Student Services - IEP Reference Guide

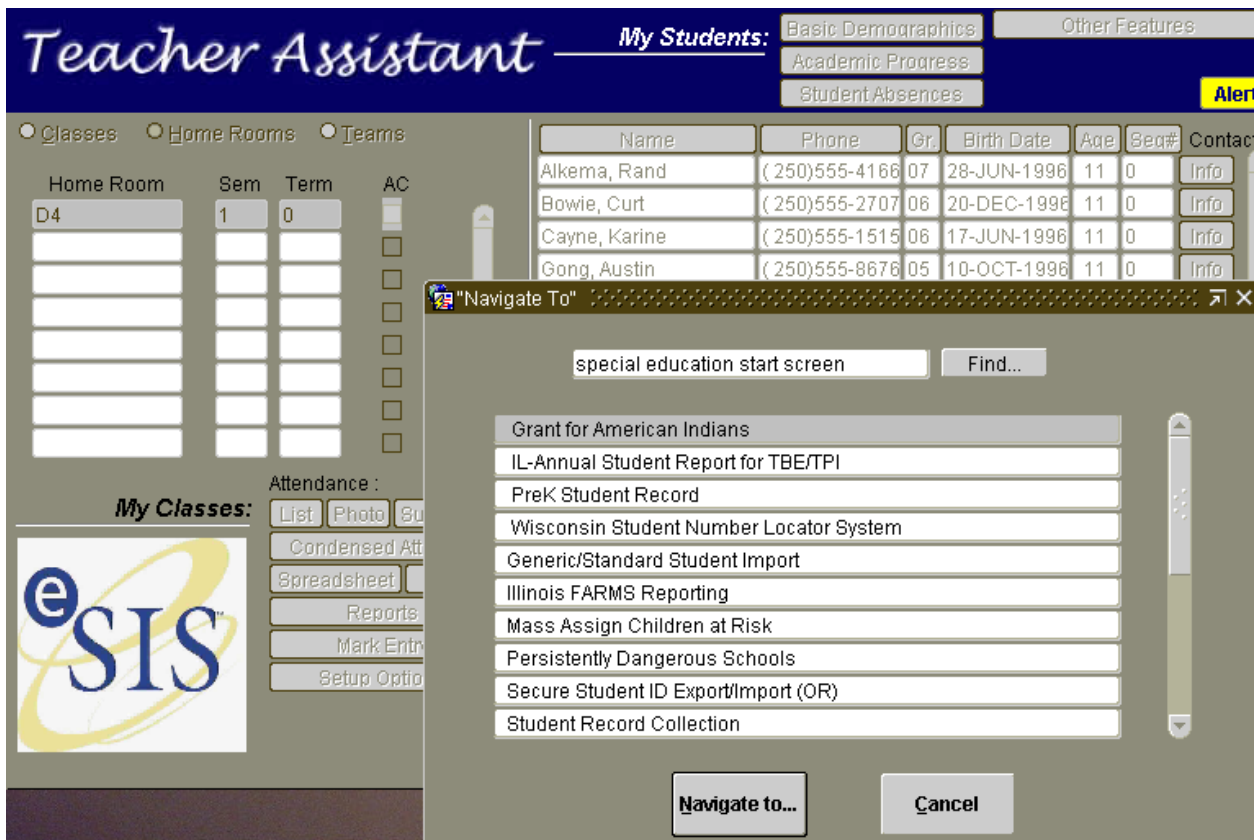
For elementary, these progress reports can be used in place of the performance scale and comments on the regular report card as at this level anecdotal information on the student's progress toward his/her IEP goals are all that is required. A performance indicator is not required.

This section also creates a more comprehensive performance history for the student than the Credit Details or Curriculum history; particularly if the student is on a completely modified program.

1.14 Teacher Access to IEP and Goal Progress Reports

The classroom teacher assigned goals for a student will have access to the following through Teacher Assistant:

- Notification that the student has an eligibility – if the school has turned on the Alerts for Special Education the teacher will:
 - See (*) next to the students name on the class or homeroom list in the Teacher Assistant;
 - See an alert button when there cursor is on the student and within the Alert box will see either the general information that this is a Special Education Student, or if the Special Education Detail is turned on in the school alerts, the teacher will see the specific eligibility the student has;
 - Be able to navigate to the Student Services module and view the IEP, including the goals for his/her subject area; and
 - Enter the goal progress report for the students assigned at the reporting period.
- When the teacher navigates to the Student Services module (see below how to select it), he/she will be taken to the Student Services Start Screen with the student from his/her class as the active student in this screen.



The screenshot shows the 'Teacher Assistant' software interface. At the top, there are tabs for 'My Students', 'Basic Demographics', 'Academic Progress', 'Student Absences', and 'Other Features'. Below this is a table of students with columns for Name, Phone, Gr., Birth Date, Age, and Seq#. The table lists four students: Alkema, Rand; Bowie, Curt; Cayne, Karine; and Gong, Austin. A 'Navigate To' dialog box is open in the foreground, showing a search input field with the text 'special education start screen' and a 'Find...' button. Below the search field is a list of search results, including 'Grant for American Indians', 'IL-Annual Student Report for TBE/TPI', 'PreK Student Record', 'Wisconsin Student Number Locator System', 'Generic/Standard Student Import', 'Illinois FARMS Reporting', 'Mass Assign Children at Risk', 'Persistently Dangerous Schools', 'Secure Student ID Export/Import (OR)', and 'Student Record Collection'. At the bottom of the dialog box are 'Navigate to...' and 'Cancel' buttons.

- Once the user has typed in “special education start screen” or any part of that with a % sign after, the user can click **Find** or use the Tab key. Click on the Special Education Start Screen in the results list that displays and click **Navigate to**, or press Enter to be taken to the Student Services module.

- The teacher would then use the Main Menu to access either the IEP or the Goal Progress reporting choices.
- Information on how to enter a Goal Progress Report is available in the Goal Progress reporting documentation.

1.15 Transition and Cross Enrollment

When a student is transitioned from a feeder school to the next school, the receiving school (based on security) will have access to the Student Services records in BCeSIS for that student. An error message will display on the screen about the Case Manager. That can be ignored as it occurs because the student's current Case Manager is not a member of staff at the receiving school.

Important Note: The receiving school should not assign a new Case Manager until after YET when the student is no longer cross enrolled through transition. However, the receiving school in conjunction with the feeder school can create a new IEP for the student for the next year. The option is also available to **Amend** the current IEP if it has not completed its life cycle of one year. However, this option creates a number of potential problems that can be avoided by creating a new IEP. The new IEP can be left open until after YET, and **Finalized** once the new Case Manager has been assigned and the September staffing and timetabling changes are completed. The start date for this IEP should be after YET (August/September of the new year). This allows the feeder or current home school to complete the Progress Reports and finish the year for the current IEP. It also starts the 12 month period for the new one in the school year in which it will actually be an active IEP. By following this process, the school can include any assessment updates – these have to occur before the IEP date in order to be included in that IEP. Future ones can be captured through the **Amend** process.

For cross enrolled students, the home school and the cross enrolled schools (based on security) are able to view the Student Services records for shared students. The cross enrolling school needs to work with the home school for access of records, ownership, entering or changing information, etc.

1.16 Amending an IEP

When to use Amend

This function enables the user to have a complete copy of the original, make the necessary changes and create no impact on the history contained in the original. It is NOT intended to be used to correct simple errors such as spelling mistakes. As with the original, once an amended version has been completed, it should be Finalized.

During the school year, when an IEP review takes place and changes are required to the existing IEP use the Amend button to create a revised version of the original IEP.

- The original IEP for this year MUST be Finalized before an amendment can be created
- The Amend function should be used instead of the Reopen function to reflect changes while maintaining history in the original

Case Manager change

When a change is made to a Case Manager during the current school year, use the Amend function to create a version of the IEP with the new Case Manager.

Change of Eligibility

When an Eligibility for a student is discontinued, and a new eligibility created, use the Amend function to create a newer version of the IEP for the current school year. When you create the amended version, you can select the new eligibility while maintaining the previous eligibility in the history for that year in the original IEP.

1.17 Planning for NEXT school year

When planning in the spring for the next school year, there are some steps that can be undertaken to start the IEP process, but there are some items that must be avoided until after YET:

- If the student is remaining in the same school with the same Case Manager:
 - The Case Manager can ADD a new IEP for the next year
 - Select the student's next year courses – this can only be done once the school has completed the course options for students for the next year
 - Complete any other parts of the IEP as necessary
 - **DO NOT FINALIZE** – the current year progress reports need to be finished and the current year IEP needs to be completed
 - the Case Manager can finalize the new IEP in the fall once all teachers and courses are settled and the student has begun work on this new IEP (typically this would be mid to late September when all staffing and course changes are complete)
- If the student is transitioning to the next school:
 - **DO NOT** assign a new Case Manager for the next school until after YET as the student does not belong to that school until the next school year
 - the current Case Manager can work with the next school to start an IEP for the next school year if desired, but this IEP must **NOT BE FINALIZED** for the same reasons as noted above
 - the next year school will be able to view all the student services information for the incoming student (with the appropriate security access) but should NOT make any changes until after YET
 - the student will be able to do course options for the next school in the same manner as all other incoming students and those will show in the IEP using the **Select** button next to the courses section

1.18 Documenting Parent Input

In the IEP, the parent participation/input can be captured as follows:

- by adding the parent(s) as participant(s) if they were part of the IEP meeting process
- by capturing in text form the parent input to the IEP – see 1.5 Parent Input Tab
- by checking in the **Considerations Tab** the tick box acknowledging that the parent was offered the opportunity to be consulted. Also, in this tab, there is a text box where information may be captured
- in addition to the IEP, there is the ability to capture a synopsis of communications with parents using the **Contact Log**

Summary

The IEP is a living document. However, when the process is completed through the initial meetings, it should be **Finalized**. As indicated in the introduction, it can then be **Reopened** (will not create another historical version) and edited, or it can be amended (will create another historical version).

Under the Student Services **Main Menu > Historical Information**, you will now be able to see a record of this document, and all subsequent versions or new IEPs.

Transition from one school to the next becomes a much less labour intensive process to provide the next Case Manager with complete information on the student. If the student is moving through this process using pre-transition, the next school would see this information in the spring and would be able to prepare for the next school year, create appropriate placement, and develop the next version of the IEP. Meeting time can then be used in a meaningful and less time consuming way as the receiving school is able to review all information prior to the meeting.

Transfer to a new school in another district is also simplified through the use of this electronic IEP/Student Services process. Once the student is admitted to the new school, the new assigned Case Manager is able to begin the placement process with all the historical information contained in this module.