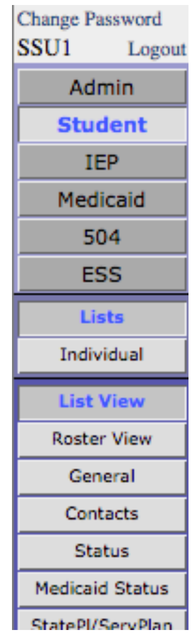
DocuSped User Guide
8/17/15 Edition

Getting Started

Use the link provided by your organization in your web browser to bring up the DocuSped log in page or use the following link: https://www.docusped.com/



Once at the log in screen, enter the LEA code for your organization (if not automatically entered) along with the User ID and Password assigned to you by your special education director or designee. That's it - one step and you're in. Consequently, it is critical that you maintain a secure, confidential password to protect the data. To create a secure password, select the Change Password link at the top of the navigation column.

You'll log directly into List View - a list of the students for which you have been given access. If you have access to more than 30 students, there will be an arrow to scroll to additional pages. To the left is the familiar navigation column although it is organized a bit differently. The Student button now provides quick access to the lists that were on the SpEdDoc Main Menu. Click the Go link to switch from List View to Individual view. Click the IEP, Medicaid, 504 or ESS buttons to access all the documents related to those topics.

While the documents will look familiar to SpEdDoc users, you'll notice a difference in printing. When you click on a print button DocuSped will save a PDF to the user's computer which you then can locate and print. So users will need to manage the PDF documents or simply delete them after printing. Since the documents are PDFs you'll be able to use any printer.

Users can change their login Password at any time by clicking the link directly above the navigation column. That is also the location of the Logout link that users click when they have ended a session. By logging out, you ensure that someone else with access to your computer cannot view confidential data.

Navigating and Creating Documents

Many screens have a pair of directional buttons in the top section. They can be clicked to scroll through a set of records. The top blue level buttons will scroll between students while lower level buttons scroll between a set of records (e.g., if in an IEP for a student, then it will scroll between that student's IEPs if there are more than one).

The second navigation method is to simply click on a button on the navigation column, e.g., if you click on IEP, then you will go to the most recent IEP for the current student. If there is no IEP for that student, you will see a button to create a new IEP.

The third method is to navigate through Student: Portals. Under the first tab in Portals (IEP) you will see an overview of the sub-records for the current student, e.g., EEE IEP, IEP, Evaluation, Meeting and Written Agreements. Click on the Portals Medicaid tab to view sub-records dealing with Medicaid, the 504 tab for Section 504 or the ESS tab for Educational Support sub-records. In Portals, there are buttons on the left for creating new sub-records. To go to an existing sub-record, click on the Go arrow at the beginning of the line containing the sub-record. To permanently delete a record, use the trash can icon at the end of the line containing the sub-record (this deletes all the documents on that line). If you create multiple sub-records for a student, you can scroll between them in Portals.

The following is a summary followed by a visual overview of the navigation columns with each of the major areas selected. They are designed to minimize the number of clicks to get to a list or document.
• **Student**: Select “Student” in the top section to enter the Student area. Below the top section, select “Lists” for List View or to select one of the other lists or reports. Select “Individual” to view information related to a specific student such as Main Data.
• **IEP**: Select “Lists” for List View or to select one of the other lists or reports. Select “Individual” to view IEPs or related documents for a specific student. After selecting the “Individual” button you’ll see another series of buttons to access documents related to IEPs, Meetings, Evaluations and the LEA Notice 7/7a.
• **Medicaid**: Select “Lists” for List View or to select one of the other lists or reports. Select “Individual” to view IEPs or related documents for a specific student. Below the Student Lists and Individual buttons are another pair of buttons. Select “Letters” to view letters and consent documents or select “Logs” to view the documentation logs.
• **504**: Select “Lists” for List View or to select one of the other lists or reports. Select “Individual” to view documents for a specific student. After selecting the “Individual” button you’ll see another series of buttons to access documents related to Plans, Meetings and Evaluations.
• **ESS**: Select “Lists” for List View or to select one of the other lists or reports. Select “Individual” to view documents for a specific student. After selecting the “Individual” button you’ll see another series of buttons to access documents related to Plans and Meetings.

DocuSped Navigation Columns Display Based on the Area Selected

Admin	Admin	Admin	Admin	Admin	Admin
Student	**Student**	Student	Student	Student	Student
IEP	IEP	**IEP**	IEP	IEP	IEP
Medicaid	Medicaid	Medicaid	**Medicaid**	Medicaid	Medicaid
504	504	504	504	**504**	504
ESS	ESS	ESS	ESS	ESS	**ESS**
Lists	Student Lists	Lists	Student Lists	Student Lists	Student Lists
Individual	**Individual**	**Individual**	**Individual**	**Individual**	**Individual**
List View	**Main Data**	EEE IEP	**Logs**	**Plan**	**Plan**
Roster View	Contacts	**Plan**	Letters	Meeting	Meeting
General	Tracking	Meeting	**Dev & Assist**	Evaluation	**Cover Page**
Contacts	Services	Evaluation	Related Services	**Cover Page**	Accommodations
Status	Notes	LEA Notice	Personal Care	Accommodations	Goals
Medicaid Status	Contact Log	**Cover Page**	Verification		Services
StatePl/ServPlan	Portals	Present Level	CM Assure		
Case Managers	Transition	Goals	Med Evaluation		
Caseload		Rubrics	Med IEP		
Child Count		Transition	LOC		
Due Dates		Transition MYP			
Initial Evaluation		Services			
Disability Sum.		Narrative			
Placement Sum.		Accommodations			
		Consent			
		Revoke			
		Not Attending			
		Revisions			
		Amendments			

Student

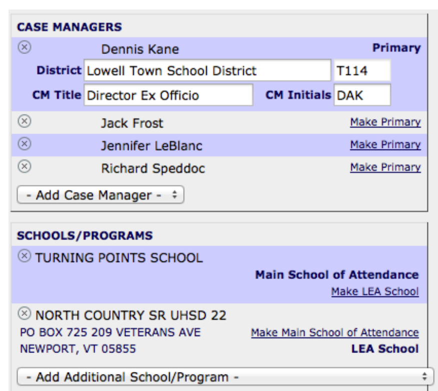
Entering and Managing Student Records

In the Student section, you can manage existing student records or start new ones if you have be assigned Edit privileges. Locate students in the Student section with one of several methods:
• Click on Student > List View on the navigation column. On List View, click the button to the left of the student name to go to that student's Main Data.
• Navigate between students by clicking the left or right arrows in the blue section on top of the screen.
• Select the Find button on the bottom of the screen, type part of the student's name in the Student Name field and click Find.

You can tell where you are in DocuSped by viewing the blue buttons on the navigation column on the left of the screen and looking for the blue buttons. The blue button in the top section of the navigation column shows the current section. Below that, Lists will display lists while Individual will display a single record. When Lists is selected, the lists available for the current section will display on the bottom part of the navigation column. When Individual is selected, the available documents will display (except for the Student section which will display general information for the current student).

Main Data

Main Data works much like it did in SpEdDoc. One major difference is that multiple schools may be associated with a student. On Main Data under Schools/Programs there ordinarily is one school listed as both the LEA School and the Main School of Attendance. For a student placed out of the typical LEA School, select two schools with "Add Additional School/Program" and indicate which is the LEA School and which is the Main School of Attendance. The LEA School is the school the student would ordinarily attend based on residence. The Main School of Attendance was labeled "Facility" in SpEdDoc and is reported to the AOE for Child Count. Likewise, students must be assigned at least one Case Manager but may be assigned multiple Case Managers. One CM must be identified as Primary for each student.



Tip: The School menu is customized for your SU/SD. If the student is attending a School that does not appear on the drop-down menu, ask the DocuSped Administrator for your organization to add it.

Dates in the Main Data Tracking box fill automatically from documents such as the cover pages of IEPs and Evaluations. To enter dates when these documents have not been created in SpEdDoc, click on the Tracking button on the navigation column. In Tracking, enter the Initial and Most Recent eligibility dates as well as the IEP Meeting and Initiation dates. These update automatically on Main Data when you create IEPs and Evaluations in SpEdDoc. Also enter Meeting Dates in Tracking for students with Services Plans, 504 Plans or Educational Support

Plans. Enter the other fields in Tracking if you are instructed to do so by your administrator. Be sure to enter Tracking dates in the appropriate column (IEP, 504 or ES).

CC Status and Status

Select Active or Exit in CC Status on Main Data for students who will be reported in the current child count census. Use the other CC Status choices for students who are not part of the current child count or will be reported by another SU/SD.

The CC Status choices are:
Active: Currently special education eligible.
Exit: Exited since the last CC report. If for December you need to report students who were missed in the prior June CC report, then be sure to check the “Exited previous period” button below the Exit Reason. Do not exit students who were not in special education, e.g., don’t exit a student who was evaluated but never qualified.
New: Under evaluation but eligibility not yet determined.
None: None of the other CC Status choices apply (e.g., students exited in a previous CC reporting period or were never eligible).
Tuition: Special education eligible and receiving services in your SD/SU, but will be reported for CC by another SD/SU (e.g., school choice students from another SD/SU).
Unilateral: Special education eligible, but will be reported for CC by another SD/SU (e.g., students placed by the family in a private school outside your SD/SU).

The Status choices vary for each organization but there are some standard selections. A student with a Section 504 plan should be Status: Section 504 and a student with an educational support plan should be Status: Ed Support. The selections for CC Status and Status determine whether DocuSped displays IEP, 504 or ESS dates on the Main Data Track section and on various lists.

Auto-Fill Data

Data entered in Student such as the student name and DOB automatically transfers to documents when you create them. However, most of this data does not automatically update in existing documents when you make changes in Student (the student’s name, CC number and birth date are exceptions). This is so old documents reflect data that was accurate at the time they were created.

Contacts

The Contacts bold label fields under Primary Contact transfer to documents and are used for child count, so Contacts should be completed ASAP and updated when information changes. While they don’t transfer to documents, the Secondary and Other Contacts may be completed for convenient reference.

Notes and Contact Log

Click the Notes button in the Student file to access a screen for entering notes. You can enter up to ten pages of notes per student.

Click on the Contact Log button to enter an unlimited number of dated contact notes. On the Contact Log screen, click the Add New button to create a new entry. Click the Print button to print the list of entries.

Spell Check, Text to Speech and Dictation

The method for activating spellcheck may vary depending on your choice of web browsers. For instance, on a Mac running Firefox, Right-click (Control-click) in a text field to bring up a contextual menu and activate spellcheck. Do the same thing on a Mac running Chrome to view several options related to spellcheck.

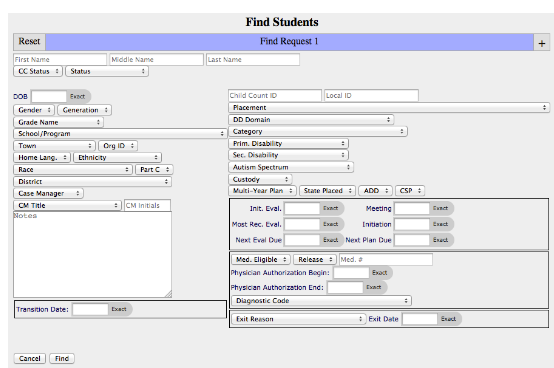
If your device is setup for speech then you can have highlighted text read aloud. For instance, on a Mac, activate Speech from the Mac toolbar under Edit.

If your device is set up for dictation then you may dictate into DocuSped fields. For instance, on a Mac, activate dictation functionality by selecting Dictation and Speech in System Preferences.

Creating a Found Set

When you first log in, you will go to Student > Lists > List View with a list of all the students you have access to except those in the Archive. Several buttons on the bottom of the screen allow you to modify that set of student records:
• Active for User finds students that the current user has access to if CC Status: Active or Tuition or Status: Active, Section 504 or Ed Support.
• All for User finds all students that the current user has access to with the exception of students with Status: Archive.
• Show Archives adds archived students that the current user has access to if currently in the All for User set.
• Select the Find button to create a custom set of records. For example, to find only active special education records, select Find and enter CC Status: Active. Click the Find button on the lower left of the Find screen to execute your find request.

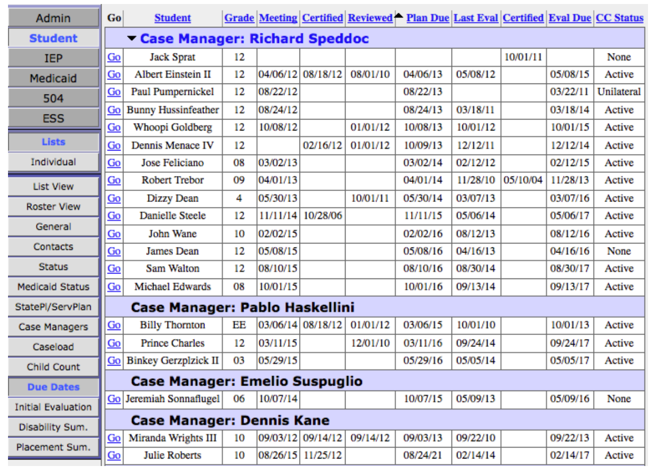
Note that the Find screen remembers criteria you entered previously. That saves time if you simply want to modify your last find request. To start fresh, click the Reset button on the upper left to clear all entries before entering new criteria.



Use the Plus button on the upper right to combine multiple requests. This is helpful when you want to enter more than one value in a search field. For example, to find Grade 7 and 8 active IEP students:
• Enter CC Status: Active and Grade: Grade 7
• Click the Plus button
• Enter CC Status: Active and Grade: Grade 8
• Click the Find button on the lower left

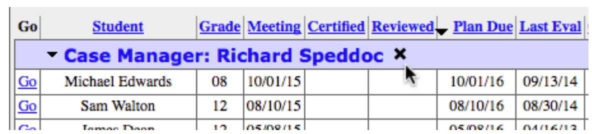
Lists

There are a variety of lists available in each section. Most of the lists function in a similar fashion, so you can use the following example with the Due Dates lists as a guide. Select Student > Lists to display several lists on the bottom of the navigation column including Due Dates. Click the Due Dates button so that Student, Lists and Due Dates are blue. To show the order that Plan Dates come due, click on the Plan Due heading first and then click on the Case Manager heading. This will produce the list you see on the right (if you only have access to a single caseload, then you'll only see one Case Manager).



Go	Student	Grade	Meeting	Certified	Reviewed	Plan Due	Last Eval	Certified	Eval Due	CC Status
Case Manager: Richard Speddoc										
Go	Jack Sprat	12						10/01/11		None
Go	Albert Einstein II	12	04/06/12	08/18/12	08/01/10	04/06/13	05/08/12		05/08/15	Active
Go	Paul Pumpernickel	12	08/22/12			08/22/13			03/22/11	Unilateral
Go	Bunny Hussinfeather	12	08/24/12			08/24/13	03/18/11		03/18/14	Active
Go	Whoopi Goldberg	12	10/08/12		01/01/12	10/08/13	10/01/12		10/01/15	Active
Go	Dennis Menace IV	12		02/16/12	01/01/12	10/09/13	12/12/11		12/12/14	Active
Go	Jose Feliciano	08	03/02/13			03/02/14	02/12/12		02/12/15	Active
Go	Robert Trebor	09	04/01/13			04/01/14	11/28/10	05/10/04	11/28/13	Active
Go	Dizzy Dean	4	05/30/13		10/01/11	05/30/14	03/07/13		03/07/16	Active
Go	Danielle Steele	12	11/11/14	10/28/06		11/11/15	05/06/14		05/06/17	Active
Go	John Wane	10	02/02/15			02/02/16	08/12/13		08/12/16	Active
Go	James Dean	12	05/08/15			05/08/16	04/16/13		04/16/16	None
Go	Sam Walton	12	08/10/15			08/10/16	08/30/14		08/30/17	Active
Go	Michael Edwards	08	10/01/15			10/01/16	09/13/14		09/13/17	Active
Case Manager: Pablo Haskellini										
Go	Billy Thornton	EE	03/06/14	08/18/12	01/01/12	03/06/15	10/01/10		10/01/13	Active
Go	Prince Charles	12	03/11/15		12/01/10	03/11/16	09/24/14		09/24/17	Active
Go	Binkey Gerzplzick II	03	05/29/15			05/29/16	05/05/14		05/05/17	Active
Case Manager: Emelio Suspuglio										
Go	Jeremiah Sonnaflugel	06	10/07/14			10/07/15	05/09/13		05/09/16	None
Case Manager: Dennis Kane										
Go	Miranda Wrights III	10	09/03/12	09/14/12	09/14/12	09/03/13	09/22/10		09/22/13	Active
Go	Julie Roberts	10	08/26/15	11/25/12		08/24/21	02/14/14		02/14/17	Active

To remove a sort selection, mouse over the blue area so the "X" shows and click it. To reverse the order that dates sort, click the black sort button on the left side the of blue bar.



Go	Student	Grade	Meeting	Certified	Reviewed	Plan Due	Last Eval
Case Manager: Richard Speddoc ✖							
Go	Michael Edwards	08	10/01/15			10/01/16	09/13/14
Go	Sam Walton	12	08/10/15			08/10/16	08/30/14

To narrow the results, start by conducting a Find. For example, if you only want students with an active IEP, 504 or Ed Support plan, select the Active for User button on the bottom of the screen. To only include active IEP students, select the Find button on the bottom of the screen, enter CC Status Active and click Find to execute your find request.

List View automatically flags Plans and Evaluations that are coming due or overdue for students with CC Status: Active or Tuition (for IEP students) or Status: Section 504 or Ed Support. Plans that are due within 30 days and Evaluations that are due within 90 days have green balloons. The balloons turn yellow when due within ten days while overdue is indicated by a red flag.

Balloons and Triangles

DocuSped features a colorful array of balloons and triangles. Balloons help users attend to upcoming plans and evaluations, while triangles indicate whether the latest school-age IEPs have been certified as written.

Green, amber and red balloons appear on several Student screens including Main Data and List View. Balloons indicate that the annual plan review or triennial evaluation report is coming due (green or amber) or overdue (red) for special education records (CC Status: Active and Tuition, both Plan and Eval) as well as Section 504 (Status: Section 504, both Plan and Eval) and ESS (Status: Ed Support, Plan only). Green balloons appears 30 days prior to the IEP annual review expiration and 90 days prior to the Evaluation expiration, while amber balloons appears 10 days prior.

By default, new IEPs are marked Draft on each page. When done writing the IEP, click the Certified Date checkbox on the left side of the cover. This clears Draft from all pages and removes triangles.

Triangles show for IEPs (CC Status: Active and Tuition) in Student List View and Main Data (as well as lists of IEP dates). Triangles disappear when the Certified Date is entered. Triangles are amber until the initiation date, at which point they turn red. Note that the Certified Date is the date the case manager certified that the IEP was written (the IEP may have been finished earlier but not certified at that point). To revise or amend an IEP, first click the Unlock box. When the revision is done, reselect the Certified Date box so the Certified Date will reflect the latest revision date.

Printing

DocuSped works with any printer as long as you can print PDF documents. Whenever you select print, a PDF document is downloaded to the default download folder for your browser. Depending on your browser and settings, the document may open in a program such as Adobe Acrobat or may appear as a tab in your browser.

Documents remain in your download folder unless you delete them. Depending on your choice of browser you may have a Clear All function in the downloads folder.

There is a button on the bottom of the screen to print the current list or document (or section of an IEP or Evaluation). Additionally, there is an Advanced Print button to print multiple documents or multiple parts of an IEP or Evaluation at once. When in an IEP, click Select All in Advanced Print to select the entire IEP. Unselect parts of the IEP that don’t pertain to the student before clicking Print in Advanced Print, e.g., if a student doesn’t have a Transition Plan, be sure that Transition and Transition MYP are unselected before printing.

The IEP also offers a button to Print IEP at a Glance to create an abbreviated IEP. This document includes some information from the Cover Page, Present Levels (check boxes to the right of Present Levels text boxes to include those portions), Goals (but not objectives), Services and Accommodations.

IEP (EEE and Classic)

Much of the information on the following pages pertains to both EEE and Classic IEPs. This brief overview of the EEE IEP focuses on the differences (more information may be found in the Vermont AOE’s IEP for EEE Workbook):
• Cover: There is a place to enter Part C to B data on the bottom of the page (this does not print as part of the IEP).
• Present Levels: This section contains five tabs. The fifth section ends with a place to rate progress on the Early Childhood Outcome areas (this is non-printing, but does transfer automatically the Assessment page at the end of the IEP).
• Goals: Instead of the user creating Goal Areas, three ECO Areas are pre-determined. Each area includes a button to select Vermont Early Learning Standards. The “Current Developmental Skill Level” fills in automatically for each area based on what is entered under

the Concern tab in Present Levels. Progress on goals is reported using a 4-point scale based on different descriptors than are used for Classic IEPs.
• Services: The EEE IEP adds an ECO popup and Development Domain checkboxes to each service (although those two fields may be left blank for Case Management).
Placement: This is very similar to Classic.
Accommodations: There is not a separate field for Other Options, so that information may be included in the “Program Modifications” field.
Assessment: This page includes a place to indicate whether the child will be assessed in the standard fashion or with an alternate method. The middle of the page displays the codes and dates entered under the fifth tab of Present Levels.

IEP Lists

There are also several lists that can be accessed from buttons at IEP > Lists:
IEP Status - view whether basic data has been entered in sections of the IEP.
Duration - view summary of IEPs with initiation and duration dates.
Transition - view summary of IEPs for students age 16 or older.
Goal Progress - view summary of progress reporting for selected IEPs.
IEP at 3 - find which students transitioned to a IEP at age 3.
Services - conduct a search of IEP services.
Accommodations - conduct a search of IEP accommodations.

Formatting Test Scores in Columns

Web browsers don’t readily support the extensive formatting capabilities that FileMaker has, but it is possible to align columns. To get scores to print in neat columns in DocuSped, just add place holders other than spaces. For example:
Test 1………4..............33
Test 2………7............112

IEP Cover Page

If information is complete in Student, much of the top section auto-fills when a new IEP is created. Click on the Fill from Meeting button to fill all the names from the latest meeting notice onto a cover page. Once entered on the cover page, the IEP Meeting Date and Initiation Date automatically transfers to Student Main Data. The Annual Review Date auto-fills on the cover page based on the IEP Meeting Date, but you can override this by manually entering a date (e.g., if a student is about to graduate). Double-click the Name and Position fields to type in them. Single-click to select from a popup list. By default, new IEP records show Parent in two locations (change to Adult Student, Guardian or Surrogate, when appropriate).

Under the print buttons is a Duplicate IEP button to create a new IEP for the same student. The Duplicate IEP contains the same information as the original, except that it excludes most of the dates found on the cover and above the progress reporting fields. It also excludes progress codes and notes that were entered on the old IEP. This allows retention of the old IEP without having to start a new IEP from scratch (do not overwrite the original IEP). When duplicating an IEP, you may uncheck sections that you don’t want duplicated. For instance, if you want to duplicate all but the goal section, uncheck that box in the Duplicate IEP dialog.

Click the Draft check box on the left side of the page to make IEP pages print with Draft in the footer. Uncheck the box before printing the finalized IEP.

On the bottom of the navigation column are buttons to create IEP Amendments or Revisions. When conducting a meeting to amend an IEP, click the “New” button to create a document that is similar to the IEP cover page but includes additional information concerning changes made to the Annual IEP. Team member names transfer from the original IEP, so it will be necessary to add or delete names to indicate participation in the amendment. Check the appropriate boxes to indicate the sections amended and, while the changes can be made in those sections of the IEP, you may also summarize the changes on the bottom of the Amendment document. If changes are made to an IEP without a meeting, click the IEP Revisions button instead of IEP Amendments.

When the IEP document is done, click the Certified checkbox on top of the IEP cover page. This communicates to other users that the document is complete and locks the IEP to help prevent accidentally overwriting it. Check the Unlock box above the Written Date if the team agrees to further changes. Note that IEPs are also locked when the IEP expires after the last duration date (a cob web appears at this point).

IEP Present Levels

Big Edit buttons are available to the right of text fields (click on a button to expand a data entry box). By default the IEP at a Glance boxes are checked. To exclude a section from printing in IEP at a Glance, uncheck the corresponding box. Be sure to enter text in each of the five boxes.

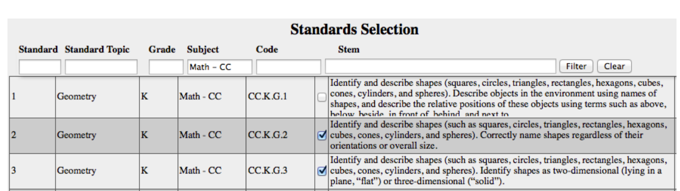
IEP Progress Notes

On top of the main Goals layout, enter up to eight progress reporting dates using the mm/yy format. Enter dates in the same format on the second row when progress reports are sent home. Enter progress codes in the corresponding columns when reports are due. The AOE progress code key prints on each goal page. The optional narrative Progress Note prints if you select the button for Print IEP Goals - Progress. Access the progress narrative field by selecting the Progress Note tab on top of the main goals page. There is one narrative note per IEP Area, so organize your entries on a cumulative basis, e.g., enter the date of the current progress period before adding note.

IEP Goal Areas

The AOE requires that each goal be assigned to an Area (e.g., basic skills) and that Present Levels information be entered for each Area. Consequently, Areas should be created before entering Goals:

• Go to the main Goals page to select the New Area button.
• Enter the name of the Area (Categories from the Goal Bank popup as options, or double-click to type a different entry).
• Click on the Details button to the right of the Area to view the four Present Levels fields for that Area.
• Enter Present Levels information in the first three fields.
• For the fourth field, click the Select



Standards Selection

Standard	Standard Topic	Grade	Subject	Code		Stem
			Math - CC			
1	Geometry	K	Math - CC	CC.K.G.1	☐	Identify and describe shapes (squares, circles, triangles, rectangles, hexagons, cubes, cones, cylinders, and spheres). Describe objects in the environment using names of shapes, and describe the relative positions of these objects using terms such as above, below, beside, in front of, behind, and next to
2	Geometry	K	Math - CC	CC.K.G.2	☑	Identify and describe shapes (such as squares, circles, triangles, rectangles, hexagons, cubes, cones, cylinders, and spheres). Correctly name shapes regardless of their orientations or overall size.
3	Geometry	K	Math - CC	CC.K.G.3	☑	Identify and describe shapes (such as squares, circles, triangles, rectangles, hexagons, cubes, cones, cylinders, and spheres). Identify shapes as two-dimensional (lying in a plane, “flat”) or three-dimensional (“solid”).

Standards button to go to the Standards Selection screen and enter your find criteria (the bank includes the Common Core standards as we as the Grade Expectations). Select the checkbox for one or more standards and click the Select button to enter them in the Area.
• Click Done to return to the list of Areas you created for the IEP.
• Click the New Area button on the main Goals page to repeat the process if further Areas are needed.

IEP Goals and Objectives

Click the Goals button to the right of the Area to go to enter goals for that Area. Click the Add New Goal button to add goals. After editing, click Done to return to the main Goals page.

Enter one goal or objective in each box (putting both in the same box may lead to printing issues and complicate reporting). The goal number serves to organize your goals and objectives (everything with the same goal number prints together). Start numbering with Goal 1 in each Area.

To create a goal, select the Add New Goal button, write the goal and enter the evaluation procedure (there is not need to select the Vermont Standard if a standard was selected at the Area level). Indicate if a goal is for Reintegration, Extended School Year or Transition by checking the boxes (R, ESY, T).

Add objectives by selecting the button with the yellow icon on the right hand side of the goal record just above the trash can. Change the order in which goals and objectives print by renumbering them. To insert a goal without renumbering the existing goals, enter a decimal number, e.g., to insert a new goal in between goals 2 and 3, enter 2.1 as the goal number. Delete any extra or blank goals or objectives using the trash can on the right side (leaving blank records creates printing issues).

After entering the goals and objectives for the current Area, click Done to return to the main Goals page with a complete list of Areas you created for the IEP. By default, the Goals section prints continuously (Print Options: Continuous) but you can start a new page for each Area (Print Options: Break Before Area). There are two similar options to generate a Progress Report (select Print Options: Continuous (Progress) or Break (Progress)).

Goal, Rubric and Accommodation Banks

While Plans can be created without using banks, the banks are useful when entering the same goal, rubric or accommodation in multiple Plans. It's also a way for users within an organization to share goals, rubrics and accommodations. Goals, rubrics and accommodations can be transferred from the banks to an IEP, but not vice versa (unless you copy and paste). So, if you think you'll eventually want a goal, rubric or accommodation in the banks, it makes sense to enter it there initially. To leave the banks and return to the current IEP without transferring anything to it, click the Return button on top of the bank screen.

Entering Goals from Bank into an IEP

Goals in the bank can be transferred to the current IEP. Navigate to the target IEP Goal page and select the Add New from Goal Bank button. Transfer a goal along with its objectives using the Enter Goal button to the left of the selected goal. If your selected goal includes more objectives than you want, use the trash can buttons on the Goals layout to delete the extras after you add the goal to the IEP. If the deleted objectives are not numerically last, then you'll need to renumber the remaining objectives after transferring the goal to the IEP. Modifying goals in the Goal Bank changes the bank, while changes made in an IEP are specific to that IEP.

To find an existing goal in the bank, enter one or more search criteria on top of the Goal Bank search window and click Filter to view results (if the Filter is not showing, click Open Filter). Entering multiple criteria yields a narrower result, e.g., if you enter Reading as your Category and your name as Author, you will only get your own Reading goals. It will help if you refine your categories when you create goals for the bank, e.g., rather than simply Writing, create categories such as Writing - Responses, Writing - Conventions and Writing - Spelling.

Click the Add Goal button to add a new goal to the bank (assigned the next available number). To add objectives for the goal, click the New Objective associated with that goal.

Goal Bank Overview

The Goal Bank should be structured similar to one (very) large IEP. As with an IEP, each goal should have a unique goal number (this happens automatically when you click the New Goal button) and each objective should have both the appropriate goal number and an objective number. Since the goal bank sorts primarily by author and secondarily by number, it's fine for different authors to have the same goal numbers. A major difference from an IEP is that student names should not be included (if you put names in the bank, they could inadvertently wind up in other IEPs).

Refer to the student by entering in the Goal Bank as <<STUDENT>>, <<HE/SHE>>, <<HIS/HER>> or <<HIM/HERSELF>> (case sensitive). Don't put actual names in the bank because they could end up in IEPs for other students. Here is an example (DocuSped automatically translates when the goal imports into an IEP):

Goal as entered in Bank:
<<STUDENT>> will read to solve problems: Given any one of the basic shapes (circle, square, triangle) and the question, "What shape is this?" <<HE/SHE>> will use preferred communication to express the name of the shape on ___ % of occasions over __ consecutive trials.

Goal as imported from Bank into Jimmy's IEP:
Jimmy will read to solve problems: Given any one of the basic shapes (circle, square, triangle) and the question, "What shape is this?" he will use preferred communication to express the name of the shape on ___ % of occasions over __ consecutive trials.

Once entered in the IEP, replace the underlined sections with the appropriate criteria for the specific student.

To add goals to the bank, enter the bank and click on the Add New Goal button on top of the screen. The New Goal button creates a new record with a goal number that is one greater than the highest previously-entered goal.

The New Objective button creates a new objective record to go with the current goal, e.g., if you are on goal number 69, the objective will have a goal number of 69. To add an objective to a different goal, first navigate to the desired goal and click on the New Objective button for that goal. Objectives are numbered automatically when selecting the New Objective button but may be manually reordered.

Enter goals by typing in the goal text box. Your name as the goal author appears automatically based on the User Code entered when you logged into SpEdDoc. The Author field is important because goals in the bank are primarily sorted by author and secondarily sorted by goal number (consequently, the objectives for a goal must reflect the same Author). Enter the Category, Standard, Grade Expectation and Evaluation Procedure (if these items are left blank in the bank, you will need to enter them each time after transferring goals to IEPs).

Enter data in the remaining search fields for each goal to assist with locating goals as the bank grows:
• Skill - Basic skill area addressed.
• Set - Identifies goal sets created for shared distribution.
• Level - Local field to distinguish levels, e.g., ECP, Elem, Middle, HS.
• Sub-Category - Place to further break down the Category.

Clicking in the Category field will pop up a list of any existing Category labels in the bank. Select from the list or double-click the Category field to remove the list and type in the new Category label (the new label will automatically be added to the list). Categories added to goals in the bank also appear in the Services page Category field.

Click the Select button to the right of the Vermont Standard field and, in the next dialog, choose from the list of Vermont Standards categories (early childhood standards are prefaced with E) and click Continue. At the next screen you will see a list of all the Vermont Standards for the selected category. Click on one to transfer it to the goal (if you had previously selected a Standard, a dialog asks if you want to replace it with the new one).

Click the Select button to the right of the GE/CC Standard field and, in the next dialog, select find criteria and click Continue. At the next screen, select a Grade Expectation or Common Core standard to transfer it to the goal. The Evaluation Procedure does not have a pop up (click in the field and manually enter your criteria).

Rubrics

Rubrics may be created in an IEP or, to reuse in multiple IEP's, in the Rubrics Bank. To create a Rubric for just one IEP:
• Click the Add New button.
• Enter enter a Topic.
• Select the IEP Goal (from the current IEP) associated with the Rubric.
• Select the column headings (selecting the first heading changes the set). Delete the last heading if your Rubric only has three levels.
• Click the Rubric Rows button to view rows and then Add Row to create a new row.
• Enter rubric content.
• Click Done to return to the IEP Rubrics page.

Click the Add New from Rubric Bank button to enter rubrics in the bank or to select an existing rubric to transfer to the current IEP. The Rubrics Bank includes several search fields: Author, Topic, Skill (select a basic skill area) and Level (local field to distinguish levels, e.g., ECP, Elem, Middle, HS). Enter your search criteria and select Filter to view results. Click Select to the left of a rubric to send it to the current IEP.

Transition

Transition includes question mark icons to view examples for many of the items (simply mouse over). Complete the Transition page for students who will be 16 or older during the life of the IEP. DocuSped provides a red reminder if the student meets the age requirement for a Transition plan. The red message remains until you enter enter text in each field on the Transition page (with the exception of the last field, needed only for students turning 17). Progress codes must be reported for transition goals (either on the Transition page or the Goal page, depending on where the transition goals are entered).

The Transition Multi-Year Plan is only required for students with an alternative credit accrual plan. The MYP should be complete, so use the Duplicate IEP function to copy from year to year.

IEP Services

Before adding services, enter the initiation and duration dates on the Cover Page. Those dates then appear on the upper left of the Services screen. The currently selected set of dates attach to newly-added services. Use the Custom line to enter a date range that differs from those on the Cover Page (e.g., when the IEP is amended). Dates can also be edited directly on each service line. The printed services will be grouped in chronological order. Dating each service makes it clear when each service begins and ends.

Services are entered by first clicking the Add Services button located on the upper or lower right of services portal or on the middle left of the portal. Click in the second column to select the category for each service. This groups services for printing in the manner prescribed by the Vermont AOE. Make your selection according to the following priority order:
• ESY if Extended School Year Service; if not, then
• Trans if Transition Service; if not, then
• RS if Related Service; if not, then
• SpEd for all other special education services.

Click in the next three Services columns to select from a popup list, or double-click to type in a different choice. Personnel Name is blue to indicate that it doesn't print on the IEP. It is used to generate reports to assist with Service Plans, scheduling and budgeting. Staff with DocuSped Admin access can enter the names of personnel along with their titles in User Values. That will then allow selection the names from a popup list when entering services in IEP's and auto-fill the personnel title.

Duration and Sessions are entered strictly as numbers in order to automatically calculate minutes per week for reports. Enter the Frequency by selecting Daily, Weekly, Every Two Weeks, Monthly or Annually. Examples:
• If service is three times a week, then Sessions 3, Frequency Weekly
• If twice a month, then Sessions 1, Frequency Every Two Weeks

• If service is quarterly, then Sessions 4, Frequency Annually

Enter the group size:
• Professional small group = 6 or less
• Paraprofessional small group = 4 or less.
For co-teaching, enter group size as Co-Teach.
Enter the Mode
• D: Direct (professional)
• I: Indirect (e.g., para), C: Consult
• M: Case Management
• A: Assessment.
The AutoLOC column is used by Medicaid clerks (see AutoLOC Feature in the Medicaid section). The trash can button can be used to delete a service line.

Next to the Print Services button are Print Options for printing everything found in the three Services tabs or just the current page.

Narrative

The Description field is used to describe services in more detail. The Placement field includes a popup menu that corresponds to the placement list on Student: Main Data. The Participation field offers a popup list. The Other field is used to document other options the IEP team considered.

Accommodations

The third tab in the Services section includes Accommodations. Identify any program modifications or supports for personnel in the first field.

Check at least one of the top three assessment boxes. If you check the second box, be sure to indicate which accommodations will be used for state assessments and/or NDS (national, district and school assessments) by selecting the appropriate boxes after each accommodation.

There is a narrative field for describing accommodations but this field is unnecessary if you detail the accommodations in the following section by entering one accommodation per text box. Accommodations print grouped by category, starting with Testing and then other categories alphabetically (unless the category name was left blank). To print the review columns select the Print IEP Accommodations - Review button.

Accommodations Bank

The Accommodations Bank works much the same as the Goal Bank. Accommodations can be transferred from the Accommodations Bank to an IEP, 504 or Ed Support Plan, but not vice versa (except, of course, through a copy and paste process). So, if you think you'll eventually want an accommodation in the bank, it makes sense to enter it there initially. Selecting the "Enter Accom" button transfers just the selected accommodation to the current Plan.

Access the Accommodations Bank using the Add from Accom Bank button on the Accommodations of an IEP, 504 or Ed Support Plan. Here you can view any accommodations that have been entered by users in your organization as well as a default set that includes all the allowable NECAP and SBAC accommodations, supports and tools. To add accommodations to the bank, click on the Add New button on top of the screen. To return to the current Plan without transferring anything to it, click the Cancel button on the bottom of the screen.

To search the bank, use the search fields on top of the Accommodations Bank layout. Enter one or more search criteria and click Filter to view your results. Click the Select button to transfer an accommodation to the current Plan. In the Plan, you can use the trash can button on the Accommodations layout to remove any that are no longer needed. Modifying accommodations in the Accommodations Bank is permanent, while changes made in a Plan are specific to that Plan.

IEP-at-a-Glance

Some schools may choose to print a condensed IEP At A Glance document for some staff in place of the entire IEP. This feature is accessed through the Print IEP At A Glance button below the IEP pages. The document includes some information from the Cover Page, Present Levels (checking boxes to the right of Present Levels text boxes include those portions), Goals (but not objectives), Services and Accommodations.

Services Plan

The IEP form may be modified into a Services Plan for home and private school students simply by checking the box in the upper left hand corner of the IEP Cover Page. Then the desired portions of the IEP form may be completed and printed to create the Services Plan. For instance, a plan might consist of the following four pages: Cover, Present Levels, Goals and Services.

IEP Consents and Notices

Consent for Initial Provision

Consent for Initial Provision of Special Education Services is a one-page form. Most of the fields auto-fill based on information entered in Student. Enter the date the signed form is received on the bottom right of the layout.

Revocation of Consent

Most of the fields on Revocation of Consent for Provision of Special Education Services auto-fill based on information entered in Student.

Not Attending (Written Agreement)

Written Agreement for Not Attending an IEP Meeting is a form to agree that an IEP team member will not attend a meeting. Create a new form by clicking the Not Attending button on the bottom of the navigation column while in IEP > Individual > Plan and then click the Create button. If there is already a form created it will take you to the existing form. From there you can click the button on the bottom of the screen to create a new document. You can also view existing Written Agreement records in Student > Individual > Portals.

IEP Revisions (Written Agreement)

Agreement to Revise the IEP Between Annual Review Meetings is a form to agree to an IEP change without a meeting. Create a new form by clicking the button on the bottom of the navigation column while in IEP > Individual > Plan and then click the Create button. If there is already a form created it will take you to the existing form. From there you can click the button on the bottom of the screen to create a new document. You can also view existing Written Agreement records in Student > Individual > Portals.

Evaluation Plan and Report

Cover Page

If information is complete in the Student file, much of the top section will auto-fill. Click on the Fill from Meeting button to fill all the names from the latest meeting notice onto a cover page. Once entered, the Plan, Consent and Decision dates automatically transfer to Student. Note that the form now includes a place to record the date that consent for testing is received. Double-click the Name and Position fields to type in them. Single-click to select from a popup list. The User Value lists for the bottom part of the form (below the required team members) are Participant and Participant Title. There is a Yes/No popup to indicate who was involved in developing the plan, but participants are expected to initial agreement with the decision (or submit a dissenting report).

Also on the bottom of the navigation column is a button to create an Amendment to document reconvening the team in order to review assessment results that were received following the Eligibility Decision meeting. If the team is determining a new primary disability, develop a new Evaluation rather than using this form. Create an Amendment that is similar to the standard cover page but includes additional information concerning changes made to the Evaluation. Team member names transfer from the original Evaluation, so it will be necessary to add or delete names to indicate participation in the amendment. Summarize the changes on the bottom of the Amendment document.

Here are suggested guidelines for when to create a new report or amend the existing one:
• If the team determines initial eligibility for special education, this needs to be documented in a new evaluation report which will generate a new triennial date. You may copy information from an earlier evaluation report that is needed for the eligibility determination.
• If the team determines a new primary disability for an existing special education student, this needs to be documented in a new evaluation report which will generate a new triennial date.
• If the team is not determining a new primary disability for an existing special education student, (rather, the team is considering a secondary disability or adding information for programming purposes), then an amendment cover sheet is generated from the existing evaluation cover page (so the new dates are on the amendment cover page and do not trigger a new triennial date). When amending an evaluation, enter the amendment report date in places where information is added so that readers can tell what was added on that date.

Click the Draft button on the upper left of the cover page to print a document with Draft appearing on the pages. When completed, click the Certified checkbox on the upper left of the cover page. This clears the Draft box, communicates to users that the document is complete and locks the document to help prevent accidentally overwriting it. Check the Unlock box on the left side of the cover to amend the report.

Disability Determination

Information auto-fills when a disability is selected in the Disability Determination section. This section has tabs for up to five disability areas. Click on a tab to select a suspected disability. Questions auto-fill based on the disabilities selected on the tab (click in the fields to edit the auto-filled text). Type answers in the same field along with the questions. Enter the conclusion in Section B. Click the Section C popup to view to select from the eight assessment areas and titles of those responsible. If you select multiple disabilities, each disability will have its own tab. Click on a tab to edit the information for that disability.

To reselect a disability, don't just change the name of the disability on the tab. Instead, click the Clear Page button to the right of the tabs to clear everything on that page. Then when you select a new disability the corresponding new questions will fill in as well.

Adverse Effect

This section has tabs for up to nine basic skill areas. Click a tab to select a basic skill area of concern. Required questions are built into the form (although additional questions may be entered into the Section A). If the team elects not to consider a question, you may deselect the checkbox to the right of that question so it doesn't print. Click in the Section D popup to view and select from the six assessment areas that will be considered for the basic skill and to indicate who will be responsible for each area.

Regulations only require documentation of adverse effect in one basic skill for eligibility. However, once eligibility has been determined, it remains important to identify if any additional basic skill areas need to be addressed in the IEP. An alternative to creating a separate page for each basic skill is to select Additional Measures on one tab and list several basic skills on one page. In this way adverse effect can be documented on at least one measure for these additional basic skills.

Need for Special Education

Questions auto-fill based on the disabilities selected on top of this form. Click in the fields to edit the auto-filled text.

Decision

Document the team's decision. If the student is special education eligible, select the primary disability and then list any secondary disabilities below the primary disability. Be sure to also update the primary and secondary disabilities on Student Main Data. This page includes a written prior notice statement.

Evaluation Consents and Notices

Eval Notice

Notice of a Special Education Evaluation provides notice of an evaluation for eligibility or other purposes. Most of the fields auto-fill based on information entered in Student.

Eval Consent

Consent for a Special Education Evaluation is a one-page form. All but the date auto-fills based on Student data. Enter the date that consent was (or was not) received on the bottom of the form.

Evaluation Delay

Notice of Evaluation Delay is restricted to initial evaluations since re-evaluations are no longer subject to the 60-day rule (they still need to be completed within three years of the prior evaluation). Most of the fields auto-fill based on information entered in Student.

No Re-evaluation (Written Agreement)

Written Agreement Between Parents and District – Re-evaluations is a form to agree that eligibility will be re-determined without an evaluation. Create a new form by clicking the button on the bottom of the navigation column while in IEP > Individual > Plan and then click the Create button. If there is already a form created it will take you to the existing form. From there you can click the button on the bottom of the screen to create a new document. You can also view existing Written Agreement records in Student > Individual > Portals. Be sure to enter the parental signature date in Student > Tracking > Most Recent Eval. so that the next triennial date can be calculated.

Transfer Student (Written Agreement)

Completion of an Evaluation of a Transfer Student is a form to agree that an initial or re-evaluation of a transfer student will be completed later than would ordinarily be required. Create a new form by clicking the button on the bottom of the navigation column while in IEP > Individual > Plan and then click the Create button. If there is already a form created it will take you to the existing form. From there you can click the button on the bottom of the screen to create a new document. You can also view existing Written Agreement records in Student > Individual > Portals.

Meeting Notice and Minutes

The Notice and Minutes forms include a Duplicate button to create a new record. Use this to retain the old record in the database while creating a new Notice or Minutes form. The Duplicate feature retains some data from the original form, e.g., the names of meeting participants.

Meeting Notice

The meeting date and time will appear bold. You may optionally enter an end time for the meeting. Double-click the Name and Position fields to type in them. Single-click to select from a popup list. The User Value lists for the bottom part of the form (below the required team members) are Participant and Participant Title. The IEP and Evaluation cover pages include a Fill from Meeting button to fill all the names from the latest meeting notice onto a cover page.

Minutes

This is not a state-mandated form. The Minutes form may be used to take minutes during a meeting. Other users prefer to print the form to bring to the meeting as a cover page for handwritten minutes. A third option is to take minutes with a word processor and then paste them into DocuSped after the meeting. The list of names on the Notice automatically appears on the Minutes form. After the parent name, there is a place for the parent to initial that s/he was informed of parental rights.

Next Steps

This form is used for the first IEP meeting when the child is transitioning from CIS/EI to EEE.

LEA Refusal and Decision

Notice of LEA Refusal (Form 7) and Notice of LEA Decision (Form 7a) contain narrative fields. The Procedural Safeguards Contact can be selected from a popup by clicking on the name field (if the name and contact information have been entered in the User Values or you can type it in (typically, the special education director is the contact for the SD/SU).

Section 504

Access Section 504 forms through the fourth tab on Student > Portals. Section 504 forms are largely self-contained, i.e., they are a complete set of forms independent of the various special education forms elsewhere in the database. However, all students need to be entered on the Main Data and Contacts screens in Student before proceeding (but disregard those fields that only apply to special education, e.g., Placement, DD Domain, Category, Disability). Several forms that list team member names have a Fill from Meeting List button to transfer the names you entered on the Section 504 Meeting Notice to the current form.

Entering the 504 Coordinator’s name on the bottom of any of the 504 Evaluation forms will automatically enter the coordinator’s name and contact information on the following two forms for the current student: “What is Section 504” and “Summary of Parent/Student Rights.” Access these two documents by clicking the buttons on the bottom of the navigation column (the documents are not student specific, so may be reproduced for future use).

The Section 504 forms include:
F1 Referral for 504 Evaluation (refer a student suspected of having a 504 disability)
F2 Notice of 504 Referral for Evaluation (notify parents of start of 504 process)
F3 What is “Section 504” (overview of 504 to share with parents)
F4 Summary of Parent/Student Rights Under 504 (504 parental rights)
F5 Invitation to a 504 Meeting (notify parents of a 504 meeting and its purpose)
F6 504 Evaluation and Determination Report (document the evaluation process)
F7 Notice of 504 Decision (notify parents of a decision regarding a 504 disability)

F8 504 Notice and Consent for Testing (obtain permission for a 504 evaluation)
F9 504 Meeting Minutes (document meeting discussion and decisions)
F10 504 Plan-Accommodations, Services & Supports (document what will be done)

504 Disability Determination Flow Chart