

EasyIEP™

Developing Quality and Compliant IEPs
Administrator Manual



Table of Contents

Login Message	5
Logging into EasyIEP™	6
Password Policy	6
Electronic End-User Agreement	7
Electronic Tennessee EasyIEP™ Access Agreement	8
EasyIEP™ General Information	9
Security	9
User Access and Permissions	9
EasyIEP™ Access Request Form	9
User Access Agreement Report	9
Important Symbols in EasyIEP™	11
Main Menu	12
Message Board	12
Message of the Day (MOTD) and Login Page Message	14
Uploading Files.....	15
Student Data Imports	16
Researching Student Import Errors	17
Students Tab	23
Student Search.....	23
Personal Demographics	25
TEIDS Student Search.....	26
Advanced Student Search.....	27
Searching by Primary Option	28
Searching for a Blank Primary Option	28
Inactivating Student Records.....	30
Inactivating a Student Record	32
Students Eligibility Tab.....	33
Student Compliance Symbols	34
Common Compliance Symbols	35
ECO Compliance Symbols	37
TEIDS Ages 0-3 Compliance Symbols.....	37
Deleting Student Documents and Events.....	38
Delete Documents from the Documents tab	38
Accessing the Student History page	39
Deleting Events	40
Delete an event from the student history page	40
Delete an IEP that has associated Progress Reports	40
Student Transfers.....	42
District Student Transfer Contact List.....	42
Out-of-State Transfer Process	43

BEP Funding Options	44
Troubleshooting Options	44
Correcting an Options problem	46
Isolation and Restraint Tabs	47
My Docs Tab	51
Batch Printing	51
Wizards Tab	52
Progress Report Wizard (Report Card)	52
Caseload Administration Wizard	55
Removing Students from a Caseload	56
Transfer/Copy Caseload.....	56
Additional Tracking of Caseload Changes.....	57
Schools Tab	58
View School Information	58
View School Compliance.....	59
Update School Information	60
Calendar.....	61
ADM Report Periods	65
Progress Reporting Periods	68
Custom Calendars.....	70
School System Tab	71
System Info	71
Summary.....	72
Reports.....	73
Updates for Selected Reports.....	75
Keep and Rename Reports	76
Lists	76
Assign Teachers	78
Inactive Students	79
Student Reactivations.....	81
User Types	83
User Type Assign.....	84
External Systems.....	85
Users Tab	86
Search for an Existing User	86
Add a New User	88
Add Personnel Information for Federal Report Table 2	90
Inactivate Users	93
Changing a User’s Password	95
Compliance Email Alerts	96
My Info Tab.....	97
Change Your Password	97

Change Personal Information	98
Logging out and Exiting EasyIEP™	99
To Log out and Exit EasyIEP™	99
Top Ten Things Administrators Need to Know about EasyIEP™	101
State and Federal Reporting	103
December 1 Reports	103
End of Year Reports	104
Year End / Startup Procedures	105
Appendix	150
Revisions to Manual	150
Summer 2012	150
Summer 2013	150
Winter 2015	151

EdPlan by PCG Education

Tennessee Reference System
Login Page Message appears here.....

Name

Password

[Forgot Your Password?](#)

Student Success Planning - PCG Education is a leading national provider of data solutions that promote student success. We combine K-12 consulting expertise with innovative technology and research-based methodology to help educators make informed decisions that lead to improved student outcomes.

[Download Adobe Reader](#)

Services include:

- Response to Intervention (RTI) Management
- Special Education Management
- Student Behavior Management
- Student Support Plans

SIF Version 2.0 Compliant

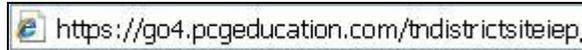
Login Message

Districts are able to post a 'Login Message' on this page alerting Users of important dates, deadlines and other reminders. The messages are posted on the login page in large bold red print. Statewide messages from EasyIEP™ are in smaller red font on the left.

To view documents in EasyIEP™ Adobe Acrobat Reader must be installed on your computer. Check with the IT Technical administrator to verify Adobe Acrobat Reader is installed on your computer.

Logging into EasyIEP™

1. Open a Web Browser and enter your District's URL in the address bar. The District site is replaced by the appropriate District name.



1. Enter your Username on the Login screen
(First Name <space> Last Name)
2. Enter your password (case sensitive)
3. Select the 'Login' button.

i Having trouble getting your site to come up? Make sure there is an 'S' after the http. All sites start out with https://.

Note: The Username is not case sensitive, but the password is case sensitive and must have at least eight characters. Please do not leave your password for others to see or select 'Yes' in the box that asks "Do you want Internet Explorer to remember this password?"

If the User has previously setup a 'Forgot Password Question', they may click on the link to 'Forgot Your Password' to obtain temporary access to EasyIEP™.

Password Policy

As part of on-going efforts to uphold security of the data managed, PCG Education™ is moving its suite of hosted application to use hardened passwords for system access.

The hardened password policy is as follows:

- Requires use of complex passwords
- A minimum of 8 characters
- At least one upper case character
- At least one alphanumeric character
- At least one numeric character
- At least one special character, like @, #, \$, % ...etc.
- Must not match the last 3 passwords the User selected
- Password expires every 90 days
- Forgotten password link for Users, with CAPTCHA option (only available if the User forgets password)

Electronic End-User Agreement

Upon initial login to the EasyIEP™ system Users must acknowledge they have read and understand the End-User Agreement policy of the EasyIEP™ system. They acknowledge this by clicking the 'Agree' button on the initial log-in page. If a User does not acknowledge and agree by clicking the 'Do not agree' button they are automatically logged out of the EasyIEP™ system.

**Public Consulting Group, Inc.
Electronic End-User Agreement
PCG Licensed Products**

NOTICE TO END-USER: BY SELECTING "I AGREE" BELOW, YOU AGREE TO ALL OF THE REPRESENTATIONS AND TERMS SET FORTH BELOW.

Metro Nashville Public Schools - Staging ("the School System") has purchased a license to use a Public Consulting Group, Inc. ("PCG") electronic software product subject to the provisions of a licensing agreement between the School System and PCG ("the PCG Licensed Product"). PCG Licensed Products include, but are not limited to: BehaviorTus™, ClassroomTrac™, EasyIEP™, and EasyTrac™.)

You, the End-User of the PCG Licensed Product, represent and agree as follows:

1. You are an employee of the School System and you are authorized by the School System to use the PCG Licensed Product.
2. You will use the PCG Licensed Product only for authorized School System purposes, at locations authorized by School System.
3. You will not share your password with any other person, and will change your password as may be required by PCG or School System.
4. You will not access or attempt to access the PCG Licensed Product software that is not intended for user access, and will not copy, transfer, reverse engineer, disassemble, decompile, distribute, modify, translate, or create derivative works of the PCG Licensed Product software or any part of the PCG Licensed Product software.
5. You acknowledge that the PCG Licensed Product is the property of PCG and is protected by copyright, trade secret and contract laws.

Note: Clicking on "Don't Agree" will log you out.

Copyright © 1999-2012, Public Consulting Group, Inc. All rights reserved.

Electronic Tennessee EasyIEP™ Access Agreement

Upon first login to EasyIEP™, Users must read, acknowledge, and agree to three statements regarding their access to the Tennessee EasyIEP™ system. The User is required to type their name as it appears in the system and enter the date of agreement prior to clicking the 'Agree' button. If a User does not acknowledge and agree to these statements, their access to Tennessee EasyIEP™ system is denied.

Tennessee EasyIEP Access Agreement

Users must read, acknowledge, and agree to the following three statements regarding their access to the Tennessee EasyIEP system. If a user does not acknowledge and agree to these statements their access to Tennessee EasyIEP will be denied.

- 1. I agree to keep all student information confidential.
- 2. I agree that I will keep my User ID and Password confidential and will not give it to any other person.
- 3. I agree to notify the EasyIEP Administrator if I no longer need access to EasyIEP.

By completing the signature box, I attest that I have read and agree to the above statements.

Sheryn Ordway	7/20/12
Typed Full Name	Typed Date

Note: Clicking on "Don't Agree" will log you out.

EasyIEP™ General Information

Security

All EasyIEP™ information is confidential. The server uses Secure Socket Layer (SSL) technology encrypting all information transmitted through the Internet. This is the same technology used for protecting credit card numbers and other sensitive information sent over the Internet. The security level of the website is viewed by selecting the 'VeriSign Secured' symbol on the login page.

Please adhere to the following procedures ensuring security:

- Do not give your Username or password to anyone.
- Do not write your password down where it can be seen by anyone.
- Do not save documents or reports to an unsecured computer.
- Always log off of EasyIEP™ and close your browser when you are finished.
- Lock your computer when leaving it unattended. Press CTRL, ALT & DEL simultaneously.

User Access and Permissions

Access to the various areas of EasyIEP™ and the permission to execute various functions are controlled by the User type assigned to each User. Examples of common User types include Edplan/EasyIEP™ Administrator 2014, Psychologist 2014, School/District Lead 2014 and Special Educator 2014. Depending on the User type, individuals are assigned either 'View' or 'Edit' access to EasyIEP™.

Users with 'View' access only see information on a given screen and cannot edit that information. Users with 'Edit' access can view and edit information in EasyIEP™. View access and Edit access pages look different.

EasyIEP™ Access Request Form

All Users of EasyIEP™ must complete the EasyIEP™ Access Request Form. Employees MUST submit this form to the Director of Special Education or the EasyIEP™ Administrator. This form needs to be kept at the LEA and available for review by compliance monitors.

User Access Agreement Report

Districts are required to manage Users within EasyIEP™. Districts MUST have some kind of documentation showing approval of User login access to EasyIEP™. This is required by the TDOE auditors. This can include employment records, training records or procedural documentation on new employee information gathering with EasyIEP™ User permissions and assigning User login and password to the system. Access must be terminated for employees no longer working within the district in a timely fashion.

The Director of Special Education is asked to run the 'User Access Agreement Report' from the reports page in EasyIEP™ throughout the school year checking for Users that have not completed the electronic EasyIEP™ Access Agreement. Look for 'Current Status' of Active and 'Agreement Accepted' of N. Also, a particular emphasis is placed on Users no longer providing special education services in the LEA. Districts can use the report to determine who should or should not have access within the system.

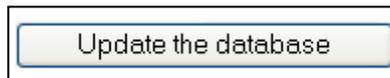
Important Symbols in EasyIEP™

	This site is secure; there is an 's' after the 'http' in the URL.
	All actions in EasyIEP™ are single clicks of the mouse.
	<i>Help</i> - This link shows general help information. See the End User Manual for updated, specific information.
	<i>Drop down menu</i> - Only one selection can be made. Click once on the gray box and select an option.
	<i>Check box</i> - More than one selection can be made. To add or remove a check, click once on the box.
	<i>Spell Check icon</i> – Click on the icon to launch the spell check function for a specific text box.
	<i>Calendar icon</i> – To add a date, click on the calendar and scroll through the screens to find the appropriate date. If your calendar does not appear, check the bottom of your screen to see if it is minimized.

The tabs along the top of the screen are used to navigate throughout the system. Please do not use the back button unless instructed by the EasyIEP™ Help Desk.



It is very important to click the 'Update the Database' button at the bottom of each screen to save changes. 'Update the Database' is equivalent to 'Save'. Any information entered is lost if Users forget to click 'Update the Database'.



Main Menu

Message Board

Contact the EasyIEP™ Help Desk with any questions, concerns, suggestions or bug reports. Messages are answered as submitted.

To send a Question, Bug Report, Comment or Suggestion:



1. Select the blue hyperlink 'Send us a Message'.
2. Select which type of message you need to send by selecting the appropriate blue hyperlink. Message types of 'Question, Comment or Suggestion' are for questions, comments, Student transfer requests or suggestions. Use the 'Bug Report' type, when a feature or function of EasyIEP™ is not working correctly.
3. All Message Board requests must include a Student's full name and date of birth for further research by the EasyIEP™ Help Desk. If the requests reference Users or User types, please include specific examples.
4. To request an IEP transfer, post a message and include the following information: Student's full name, date of birth, sending District and receiving District
5. Type the subject of your message in the 'Subject' box. Include details and be as specific as possible.
6. Enter your e-mail address in the 'Your email address' box so the EasyIEP™ Help Desk can reply to your request. Your email address automatically populates, if your e-mail is entered under the My Info Tab.
7. Add your message to the text box.
8. Select the 'Send Message' button.

 **Send us a Message**  New Mail!

Message Type: Question Your E-Mail Address:

Subject: Bug Report Student (if applicable):

Page Title (if applicable): Comment Suggestion

Enter the Message Here:

9. A confirmation page appears with the content of your message. Select the 'Back to Message Board' button when completed.

 **Thank You for the Question**  New Mail!

Subject:	test
Your e-mail Address:	<input type="text"/>
Message:	test

[Back to Message Board](#)

10. To access a 'New Mail' message, complete one of the following:
- Select the 'New Mail' icon located next to the 'Message Board' message options.
 - Select 'My Messages' link.

Choosing either of these links direct Users to the following screen, displaying 'New Messages' and/or 'Previous Messages'. The 'New Mail' icon on the Main Menu screen disappears, when all messages are read.

 **Messages for Peter Smith**  New Mail

This page displays all of the messages you have sent in the EasyIEP® system and the responses that you have received. If you have messages you have not read, a 'New Messages' section will appear at the top of the page. Below any new messages, a 'Previous Messages' section will display all the messages that you have previously sent or received.

New Messages					
From	Date	Subject	Message	Age (h:min)	
Anna Bourland	04/06/2007 12:46:00	RE: Transfer request	Your request has been processe...	0:13	

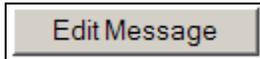
Previous Messages							
From	Date	Subject	Message	To	Read?	Replied?	Age (h:min)
Peter Smith	04/06/2007 12:46:00	Transfer request	Please transfer Sammy Sample	Help Desk	Yes	Yes	0:13

Message of the Day (MOTD) and Login Page Message

There are two tools in EasyIEP™ that allow Districts to share information with all Users.

The Message of the Day (MOTD) is a message the District’s Director or EasyIEP™ Administrator displays on the Main Menu screen of EasyIEP™. Users are able to view the message when logged into the system. To enter the MOTD, the Administrator logs into the system and then clicks on the ‘Edit Message’ button. The MOTD is entered using HTML format.

Note: Please use HTML etiquette. If you are unfamiliar with HTML, the following is an active link to a website with guidelines in how to use HTML: <http://www.w3.org/TR/html4/types.html>



A Login Page Message option is also available to post messages for viewers on the ‘Login Screen’. The message is entered by clicking on the ‘Edit Message’ button on the Main Menu page and entering a message in the ‘Login Page Message’ section. This option allows Users to view District specific messages on the login screen of EasyIEP™.

The screenshot shows a web interface for editing messages. At the top, there is a header "Message of the Day: New Mail!". Below this is a text area containing HTML code for the message. The code includes paragraphs with centered text in red and purple. Below the text area is a section titled "Login Page Message:" with a text input field containing the placeholder "Login Page Message goes here.....". Below the input field is a red warning message: "Please allow 60 seconds for changes to these messages to propagate through the system." At the bottom of the interface is a button labeled "Update Message".

Uploading Files

At the bottom of the Main Menu page, various files are available to Users for viewing or downloading. Instead of sending e-mail attachments to everyone in the District, the EasyIEP™ Help Desk, District Administrators or PCG staff often uploads the necessary file(s) to the main page of EasyIEP™. View a file by selecting the name of the file (denoted by a blue hyperlink). If desired, files are saved to an individual computer when opened. After viewing the file, select the Main Menu tab at the top of your screen. Do not close the browser because the User is still logged into EasyIEP™.

This ensures any electronic documents the District uses on a regular basis are located easily. These files are accessible to anyone in the District using EasyIEP™. Documents commonly uploaded are: EasyIEP™ User Manuals, as well as District specific forms, Behavior Intervention Plan Forms, Functional Behavior Assessment forms, etc. To upload files click on the 'Upload File(s)' button.



Click the 'Browse' button to locate the file on the computer or network.

Use this section to upload files for other users to view and/or print

File to Upload:	<input type="text"/>	<input type="button" value="Browse..."/>
Label (optional):	<input type="text"/>	(if Label is empty, filename will be displayed)
Existing File to Replace:	<input type="text"/>	(to replace an existing Uploaded File)

After the file is located, click the 'Upload File(s)' button at the bottom of the screen. When logged in to EasyIEP™, all files are listed below the Message of the Day (MOTD) and login page message.



Student Data Imports

Manual editing of student school and grade fields in the EasyIEP™ system will no longer be permitted after Aug 8, 2014. The Division of Special Populations has made a concerted effort to improve data quality by limiting manual entry into the system. Student data is populated in EasyIEP™ through extracts from district student information systems (SIS); students must have an enrollment record in the district's SIS package and have a state ID in place to accurately load in EasyIEP™. These efforts will mitigate errors in student data and ensure that student information is consistent across the district's SIS package, the statewide educational information system (EIS), and EasyIEP™.

EasyIEP™ administrators as well as SIS administrators must be made aware that this automated process is in place to ensure student data are being accurately entered in the SIS package and correct procedures are being followed to get student's state ID numbers from EIS in a timely manner.

State ID numbers for students is a mandatory field to successfully import student data from SIS packages into EasyIEP™. Any student that does not have a State ID number in the EasyIEP™ system will be updated based on the State ID number provided for the student in the import summary file from the SIS package. If a student's State ID number is not included in the import summary file, this will cause an error and the student's information will not import to EasyIEP™.

All districts now have the Import Summary Data and Import History tabs available to the EdPlan/EasyIEP™ Administrator 2014 user type. These users may check the Import History for any errors that occurred during the import process and check with the LEA's SIS personnel to confirm or adjust student data.

Students without the following information in the import file will not import or update in EasyIEP™:

- First Name
- Last Name (excluding suffix)
- DOB
- State ID

Student data errors may require the following corrections:

- Student's name must match identically in both EasyIEP™ and SIS (including middle name).
- Student's data of birth must match identically in both EasyIEP™ and SIS.
- Inactive student records must have a state ID number and match identically with the active record. Always search the Inactive student records for an existing record.
- Student ID numbers must not be reused. If the student ID number has been previously assigned to another student, request a new student ID number for the new active student record.
- State ID numbers cannot be reused. Each student must have only one unique state ID number.

Districts may run the All Student Export SPED Only XLS report to find student records without a state ID number. Open the report and filter on the State ID column and look for blanks and other numbers larger than a seven digit state ID #.

Researching Student Import Errors

This guide shows the steps to access the import files and error reports and how to identify what problems have occurred and what data needs attention.

Key terms used in this document:

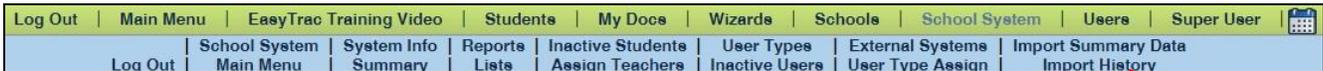
SIS – Student Information System – the system in the districts that is used to collect student level data related to enrollment, discipline, etc.

Import Output History – a zipped text file that includes the results of your import including errors, warnings, and statistics related to successful imports.

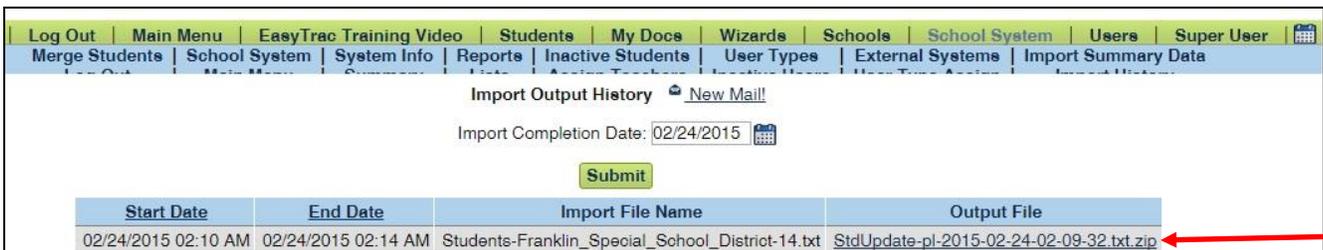
Import Summary Data – a copy of the import file that is received from the district SIS package and imported into EasyIEP™ on a pre-determined schedule.

Import Completion Date – the date the file was imported into EasyIEP™. Users will typically enter the date prior to the current date depending on the time of research.

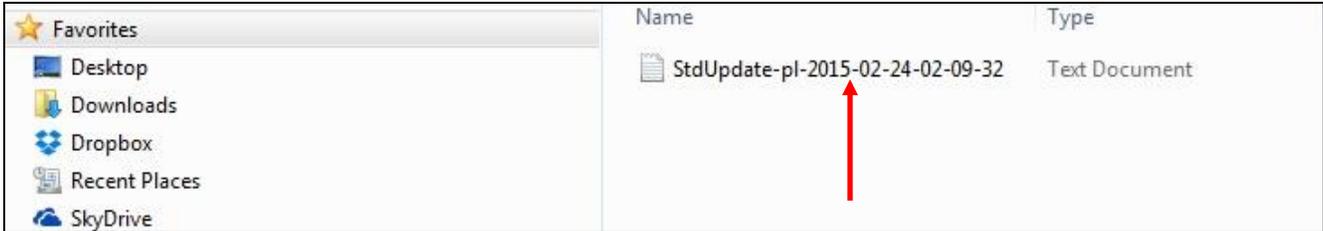
1. To access the Import Output History, from the Main Menu page in EasyIEP™ click the ‘School System’ tab. Then, click ‘Import History.’



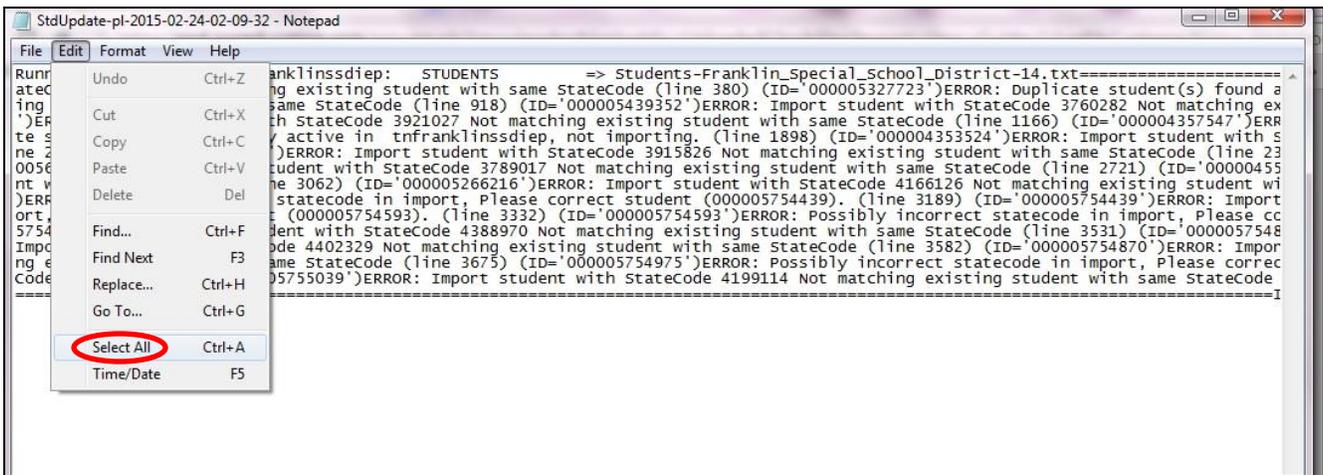
2. On the ‘Import History’ screen enter the desired ‘Import Completion Date’ and the output file associated with that import date will appear. Depending on the actions that took place on this date you could see multiple files (TEIDS, Parents, Students). Click on the ‘Output File’ to download to your computer.



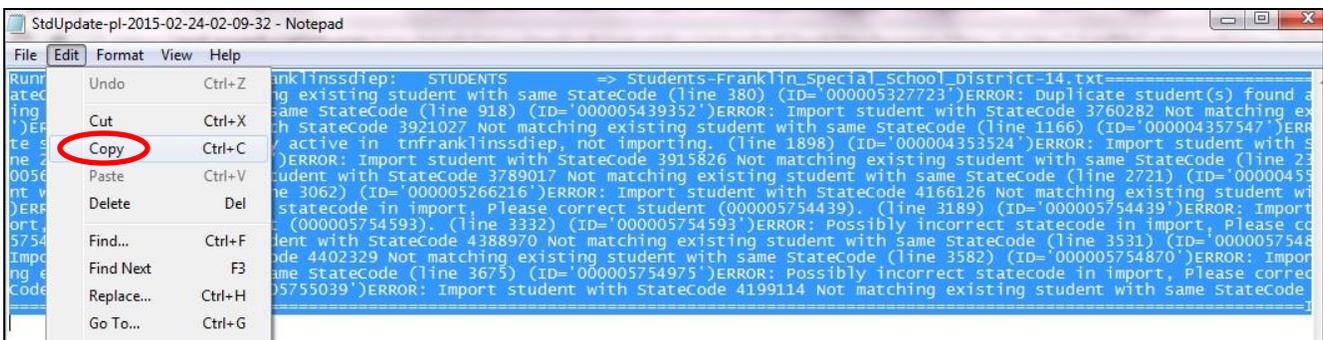
3. Once the download is complete, it will appear as a text file.



4. Once you open the text file you can search at this stage or paste the data in Excel to allow ease of viewing. To paste the data in Excel click on the 'Edit' menu and choose 'Select All.'

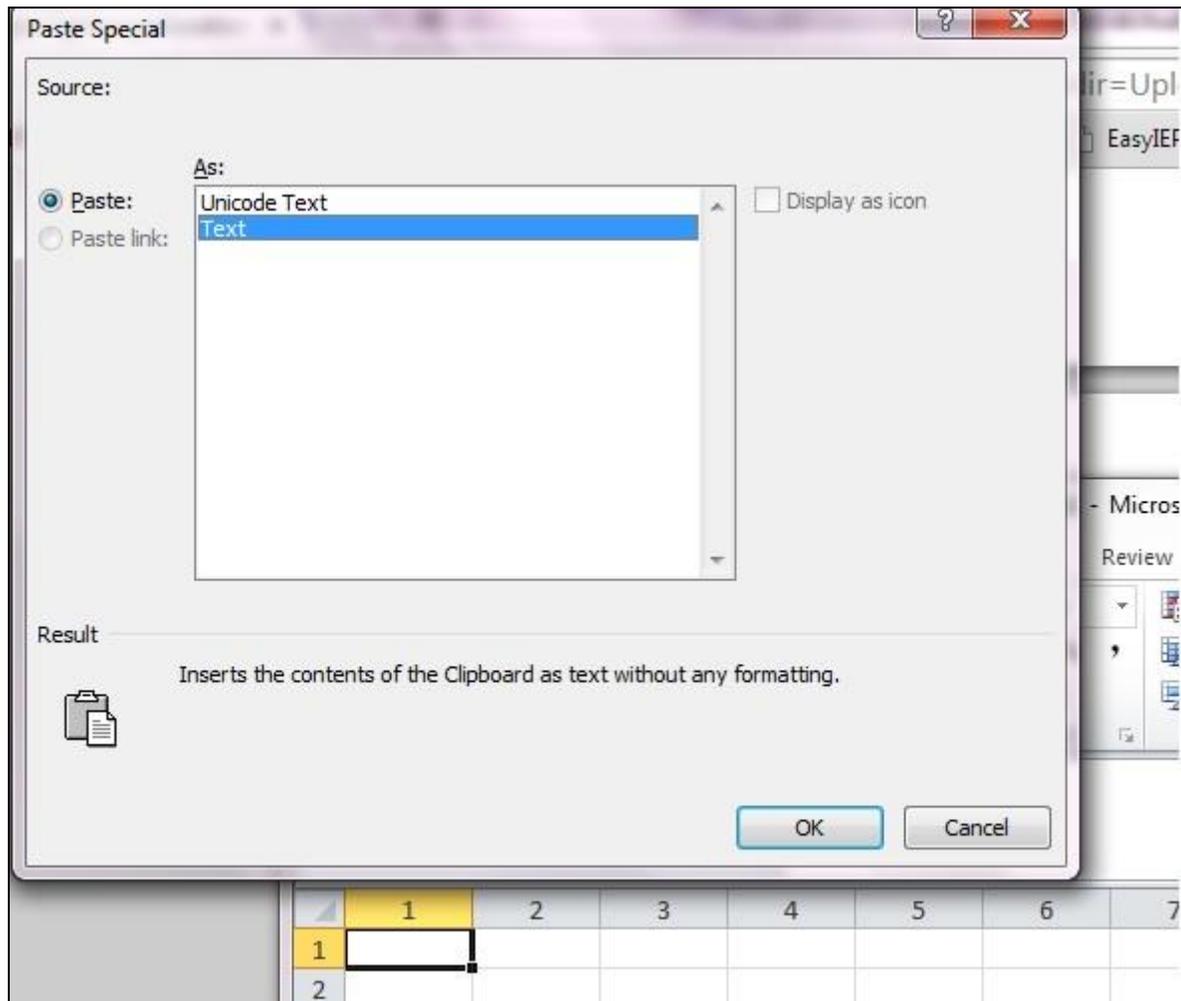


5. After you 'Select All' the data on the page will be highlighted, at this point right-click and select 'Copy.'



6. With your data copied from the text file, open a new Excel workbook. Right-click the first cell (A1) in the spreadsheet and select 'Paste Special.'

7. From the 'Paste Special' options, select 'Text,' then click 'Ok.'



- This is how the Excel spreadsheet will look like after you have pasted the information. From this screen, you can identify if any errors occurred during the import and view the warnings that the system is providing. Warnings let you know of changes that are being made in the system based on the rules for import. Take note of how the errors are listed.

	1	2	3	4	5	6	7	8	9	10	11	12	13
1	Running import(s) for tnfranklinssdiep:												
2	STUDENTS	=> Students-Franklin_Special_School_District-14.txt											
3													
4													
5		=====											
6	importStudents \\neisiloncl2\prod\prod4\Imports\tnfranklinssdiep\2015\02\Students-Franklin_Special_School_District-14.txt												
7		=====											
8	ERROR: Import student with StateCode 4121460 Not matching existing student with same StateCode (line 21) (ID='000005327126')												
9	ERROR: Import student with StateCode 4289297 Not matching existing student with same StateCode (line 22) (ID='000005614712')												
10	ERROR: Import student with StateCode 4131678 Not matching existing student with same StateCode (line 41) (ID='000005340023')												
11	ERROR: Import student with StateCode 4006340 Not matching existing student with same StateCode (line 309) (ID='000005027021')												
12	ERROR: Import student with StateCode 4237344 Not matching existing student with same StateCode (line 352) (ID='000005586046')												
13	ERROR: Import student with StateCode 4121709 Not matching existing student with same StateCode (line 380) (ID='000005327723')												
14	ERROR: Duplicate student(s) found already active in tnfranklinssdiep, not importing. (line 403) (ID='000004348882')												
15	ERROR: Import student with StateCode 4014721 Not matching existing student with same StateCode (line 526) (ID='000005037080')												
16	ERROR: Import student with StateCode 3783243 Not matching existing student with same StateCode (line 834) (ID='000004537372')												
17	ERROR: Import student with StateCode 3786632 Not matching existing student with same StateCode (line 868) (ID='000004543835')												
18	ERROR: Import student with StateCode 3787905 Not matching existing student with same StateCode (line 904) (ID='000004547417')												

- To find the corresponding details about errors in the import file, click 'Import Summary Data' from the 'School System' tab.

Log Out	Main Menu	Students	My Docs	My Reports	Wizards	Schools	School System	Users	Super User	
	School System	System Info	Reports	Inactive Students	User Types	External Systems	Custom Login Agreements	Import Summary Data	Import Summary Data	
Log Out	Main Menu	Summary	Lists	Assign Teachers	Inactive Users	User Type Assign	Messages	Import History		

- On the 'Import Summary Data' page, click the 'Details' button of the import file with the same date as the output file that you have just viewed in Excel in the previous steps.

Import Summary Data							tnref
							New Mail
Below is a listing of all imports processed by the standard import system within the past 12 months. The details will show the statistics for that import, as were reported in the import transaction email that was sent out.							
Time Stamp	Import Type	File Name	# Records	# Errors	# Warnings		
03/05/2015 11:30:00	Students	\\neisiloncl2\prod\prod4\Imports\tnref\2015\03\Import Test Students-0.xls	8	1	7	Details	
03/04/2015 10:26:00	Students	\\neisiloncl2\prod\prod4\Imports\tnref\2015\03\Import Test Students.xls	8	8	0	Details	

11. After opening the 'Details' section, right click on the import file and select 'Open in a new window'. This allows you to switch screens from the import summary file to any existing record in EasyIEP™ to verify data.

Import Summary Data tnref [New Mail!](#)

Time Stamp:	03/05/2015 11:30:00	Import Type:	Students
File Name:	\\neisiloncl2\prod\prod4\Imports\tnref\2015\03\Import Test Students-0.xls		

12. Once the file is open, you can find the associated data that is referenced in the output file. For example, this error message is seen in the output file:

- ERROR: Import student with State Code 2997361 Not matching existing student with same State Code (line 767) (ID='001538132').
- To find the data related to this error in the import file, simultaneously press 'ctrl' and 'F' to bring up the 'Find' feature on your computer.
- Copy and paste or enter the ID from the error message into the 'Find' feature to locate the error. Check if you have 1 of 1 or multiples which could be the first clue on your research.

StudentCode	LastName	FirstName	MiddleName	Gender	Race	Grade		
78415				W	11	04/28/1998	680	0027
78417				W	12	05/07/1997	680	0027
78432				M	H,W	10	06/17/1998	680
78444				M	W	10	12/30/1998	680
78445				M	W	10	12/30/1998	680
78447				F	W	12	07/18/1997	680
78451				F	W	10	01/26/1999	680
78479				W	11	02/04/1998	680	0027
78484				W	11	10/14/1997	680	0027
78486				W	12	02/07/1997	680	0027
78491				W	11	08/20/1997	680	0027
78493				F	W	11	02/22/1997	
78494				M	W	09	05/12/1999	680
78502				W	10	06/17/1999	680	0027
78511				W	10	10/13/1998	680	0027
78514				F	W	12	03/04/1997	
78532				F	W	11	08/06/1998	680
78534				W	12	12/11/1996	680	0027
78545	Arnold	Corianne	Faith	F	W	11	01/22/1998	680

Once you have identified the student in the import file and depending on the error message that you have received, you will need to compare the data in the import file to the data currently in EasyIEP™ or, if importing the student for the first time, make sure the data in the file is complete.

Students without the following information in the import file will not import or update in EasyIEP™:

First Name

Last Name (excluding suffix)

DOB

State ID number

Should you feel that the data matches exactly and you have received this error message in error, users should send a message to the message board including the student first name, last name, and state ID number.

Students Tab

Student Search

All Students receiving special education services are enrolled in the District’s Student information System (e.g., PowerSchool, Skyward, etc.) and imported into EasyIEP™. When searching for Students, both regular education and special education Students are listed in EasyIEP™. A certain number of Students appear on the screen depending on the search criteria. Narrow their search by entering the first three letters of the child’s last name and selecting the ‘Special Ed’ check box. The Student search screen looks different depending on each User’s permissions. Some Users are only able to view their individual caseload.

1. From the Main Menu click the Students Tab.



2. Enter search criteria, such as ‘Student Last Name’. Select a ‘Grade Level’ and /or ‘School’ to narrow the search. If the search results provide a list too large for one page, enter an alpha range in the last name field (e.g. "a...m"). This allows the User to see a portion of the Students at one time.

Criteria for Selecting Students to View

Grade Level:

School:

Student Last Name: Exact Match

Student First Name: Exact Match

Student Middle Name: Exact Match

Student ID: Exact Match

State ID Number: Exact Match

Status:

General Ed Referral Special Ed

TEIS Referral Written Parental Permission Received IEP

IFSP Eligibility Eligibility Discontinued

IFSP

Additional Program(s): English Second Language (ESL) Parentally Placed Private School

Sort List By:

Open Results in a New Window

i It is best to leave the search as broad as possible, as well as narrow it down if too many Students are returned.

3. The Student’s record or a list of Students that meet the selected criteria appears.
4. Selecting the ‘View My Caseload’ button displays an individualized User’s caseload.

5. Select the name of the student to open the student’s record.

Note: Sort Student records by selecting the blue column headers.

Select a Student												
CP	Proj Etlg	IEP End	School	Grade	Name	Student ID	Age	Date of Birth	Dis	Case Manager	Primary Option	
✓	✓	01/23/2010	12/31/2013	SS	10	Abbie Marie Test	4441208	14 Years	11/10/1998	SLD	Sheryn Test	02
⊘	✓	07/08/2012	08/02/2011	SS	01	Aunt Bee Test	TEST1324	9 Years	01/10/2004	SLD	Sheryn Ordway	02
⊘	✓	03/01/2013		SS	P3	Benjamin Test	TEIDG123450	5 Years	08/12/2007			
⊘	✓	02/01/2015		SS	11	Beth Sam Test	T457	10 Years	04/05/1997		Mike Test	
⊘	✓	09/10/2014	10/10/2012	SS	03	Bethany Test	TEST101	11 Years	10/10/2001	AUT HI	Mike Test	

Once a User clicks on the name of the Student, the Student’s personal information page appears.

Personal Demographics

The Personal tab is a view only page of the student demographics. This information is imported from the district’s student information system.



If any of the student’s demographic information has changed, the student’s enrollment record must be updated in the district’s student information system. If additional changes are needed in EasyIEP™, post a message to the EasyIEP™ message board and include the student’s name, date of birth and change(s) needed. The EasyIEP™ Administrator 2014 user type has the permission to make changes to demographic data on the IEP Process/Personal Information Page such as the Student’s name, Student ID, Social Security Number/PIN Number, Date of Birth, Gender, School and Race which are required fields. Depending on the individual user type, the ‘Personal’ page may appear different from the illustration below.

Personal Information **Abbie Marie Test**
[New Mail!](#)

View: Workspace

Name:	Abbie Marie Test
Gender:	Female
Race:	White
Date of Birth:	11/16/2005 (Age: 8 Years)
Grade:	4th Grade
Student ID:	4441208
State ID Number	1111111
School:	Test School
Next School:	-unknown-
Soc. Sec. #:	111-11-1111
Prim. Language:	English
Language of Instruction:	English
Length of School Day:	7.00 hours (Std)

--- Current Funding Option ---

Primary Option	Secondary Option	Option Begin Date	Percent of Day
02		05/01/2014	9

Reeend current option(s) to EIS	Yes
TEIS Program	No

Make this student inactive

TEIDS Student Search

Preschool Student enrollment records are imported from the Tennessee Early Intervention Data System (TEIDS) into EasyIEP™. The TEIDS record contains the Student’s personal demographic information and the TEIDS data.

All Preschool Students referred for Part B Special Education Services must be enrolled in a District’s Student Information System (e.g., PowerSchool™, etc.). After the Student’s enrollment record transfers from the SIS to EasyIEP™, post a message to the EasyIEP™ Message Board requesting correction to any duplicate records.

1. Search for TEIDS Student records on the Student search page and select ‘Grade level P3’ and select ‘View Students’. Grade level P3 is automatically assigned to all TEIDS records.
2. Below is an example of how the TEIDS Student records appear.

Del	CP	Proj Elig	IEP End	School	Grade	Name	Student ID	Age	Date Of Birth	Dis	Case Manager
<input type="checkbox"/>	✓				P3	John Doe	TEIDS123456	3 Years	03/02/2007		
<input type="checkbox"/>	✓				P3	Susie Test	TEIDS234567	3 Years	04/01/2007		

3. To find NEW TEIDS Student records, select the ‘School’ heading to sort by school. All TEIDS Student records that do not have a school assignment show at the top of the list.

Del	CP	Proj Elig	IEP End	School	Grade	Name	Student ID	Age	Date Of Birth	Dis	Case Manager
<input type="checkbox"/>	✓				P3	John Doe	TEIDS123456	3 Years	03/02/2007		
<input type="checkbox"/>	✓				P3	Susie Test	TEIDS234567	3 Years	04/01/2007		

4. Post a message to the EasyIEP™ Message Board requesting a school assignment for each TEIDS Student record.
5. Once the school assignment is completed, assign a Case Manager to the IEP Team.
6. Enter IEP information on the TEIDS Student record only. DO NOT enter data on the Student Information System enrollment record (e.g., Star Student, Chancery, PowerSchool, etc.).

Note: Sort student records by selecting the blue column headers.

Advanced Student Search

Select the Students tab and select the 'Advanced Student Search' button. Use the Advanced Student Search page to search for Students by primary or blank funding option, compliance status, disability, special education or related services, extended school year and Student records with no Case Manager.

Criteria for Selecting Students to View

Search for students using the information from the Current IEP rather than the Workspace

Grade Level:	All Grades			
School:	All Schools			
Student Last Name:	<input type="text"/>	<input type="checkbox"/> Exact Match		
Student First Name:	<input type="text"/>	<input type="checkbox"/> Exact Match		
Student Middle Name:	<input type="text"/>	<input type="checkbox"/> Exact Match		
Student ID:	<input type="text"/>	<input type="checkbox"/> Exact Match		
State Code:	<input type="text"/>	<input type="checkbox"/> Exact Match		
Status:	<input type="checkbox"/> General Ed <input type="checkbox"/> Referral <input type="checkbox"/> Special Ed <input type="checkbox"/> TEIS Referral <input type="checkbox"/> Initial Consent for Eligibility Evaluation Received <input type="checkbox"/> IEP <input type="checkbox"/> IFSP Eligibility <input type="checkbox"/> Eligibility Determination <input type="checkbox"/> Discontinued <input type="checkbox"/> IEP			
Additional Program(s):	<input type="checkbox"/> English Second Language (ESL) <input type="checkbox"/> Parentally Placed Private School			
Compliance Status:	Initial Consent for Eligibility Evaluation Received Parent Consent Eligibility Determination IEP IFSP Eligibility IEP	Compliant <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Warning <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Overdue <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Primary Option:	<input type="checkbox"/> 01 <input type="checkbox"/> 03 <input type="checkbox"/> 05 <input type="checkbox"/> 07 <input type="checkbox"/> 09 <input type="checkbox"/> Blank <input type="checkbox"/> 02 <input type="checkbox"/> 04 <input type="checkbox"/> 06 <input type="checkbox"/> 08 <input type="checkbox"/> 10			
Case Manager:	<input type="checkbox"/> Only include students with no Case Manager			
Disabilities:	<input type="checkbox"/> Specific Learning Disability <input type="checkbox"/> Intellectually Gifted <input type="checkbox"/> Traumatic Brain Injury <input type="checkbox"/> Autism <input type="checkbox"/> Intellectual Disability <input type="checkbox"/> Visual Impairments <input type="checkbox"/> Deaf-Blindness <input type="checkbox"/> Multiple Disabilities <input type="checkbox"/> Language Impairments <input type="checkbox"/> Deafness <input type="checkbox"/> Orthopedic Impairments <input type="checkbox"/> Developmental Delay <input type="checkbox"/> Emotional Disturbance <input type="checkbox"/> Other - Health Impairments <input type="checkbox"/> Hearing Impairments <input type="checkbox"/> Functional Delay <input type="checkbox"/> Speech Impairments <input type="checkbox"/> Blind			
Special Ed Services:	<input type="checkbox"/> Academics <input type="checkbox"/> Interpreter Services <input type="checkbox"/> Social Behavior <input type="checkbox"/> Enriched Academics <input type="checkbox"/> Life Skills <input type="checkbox"/> Speech and Language <input type="checkbox"/> General Studies			
Related Services:	<input type="checkbox"/> Ancillary - Attendant <input type="checkbox"/> Nursing Services <input type="checkbox"/> School Health Services <input type="checkbox"/> Ancillary - Interpreter <input type="checkbox"/> Occupational Therapy <input type="checkbox"/> Social Work Services <input type="checkbox"/> Ancillary - Other <input type="checkbox"/> Other Services <input type="checkbox"/> Speech/Language Therapy <input type="checkbox"/> Behavioral Health Services <input type="checkbox"/> Physical Therapy <input type="checkbox"/> Vision/Orientation & Mobility Services <input type="checkbox"/> Counseling Services <input type="checkbox"/> Psychological Service <input type="checkbox"/> Work-Based Learning <input type="checkbox"/> Hearing/Audiology Services <input type="checkbox"/> Recreation Services <input type="checkbox"/> Special Ed. Aide in Regular Program			
Serving School:	All Schools			
Extended School Year:	<input type="checkbox"/> Only include students with at least one service marked as ESY			
Medicaid Status:	<input type="checkbox"/> Only include students that have a Medicaid Number			
Sort List By:	Student's Last Name			

Open Results in a New Window

[View Students](#)

Example of an Advance Student search: Find Students with a Referral date and no Initial Consent for Eligibility Evaluation Received Date.

1. On the Advanced Student page, check the box labeled 'Referral'.
2. Select the 'View Students' button.
3. The Student records displayed have a Referral date entered on the Eligibility tab and no Initial Consent date entered.

Searching by Primary Option

1. On the advanced Student search page, check the Primary Option for the selected search.
2. After selecting a Primary Option, select the 'View Students' button.

The Student Search Results page lists all Students whose Current IEP includes the Primary Option value selected.

Help	Log Out	Main Menu	Students	My Docs	Wizards	Schools	School System	Users	Super User	PCG	
Select a Student											
CP	Proj Elig	IEP End	School	Grade	Name	Student ID	Age	Date Of Birth	Dis	Case Manager	Primary Option
✓	01/02/2012	01/20/2010	EES	P3	Beth Test	TEST1001	4 Years	05/20/2005	LI,SLD	Sue Craver	02
✓	01/10/2012	01/10/2010	HCMS	08	Eng IEP2 Test	ENGTEST2	10 Years	09/06/1999	EMN,FD	Robin W Hammer	
(2 Students)											

Note: The Primary Option search displays Student records with the selected Primary Option at any time period in the Current IEP. The screenshot above shows a search on primary option 02 and Beth Test has 02 as the 'active' option in the Current IEP. However, Eng IEP2 Test has primary option 02 for the last couple months in the Current IEP, where the Primary Option field on the search page is blank because the 'active' Primary Option at this time is 03.

Searching for a Blank Primary Option

1. On the Advanced Student Search page, check the box for IEP Compliant and check the box for Blank Primary Option.
2. Select the 'View Students' button.

The Student Search Results page lists all Students with a current IEP and a Blank Primary Option.

		Compliant	Warning	Overdue
Compliance Status:	Initial Consent for Eligibility Evaluation Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Parent Consent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Eligibility Determination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	IEP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	IFSP Eligibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	IFSP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Section 504 Parent Consent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Section 504 Eligibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Section 504 Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Primary Option:	<input type="checkbox"/> 01 <input type="checkbox"/> 03 <input checked="" type="checkbox"/> 05 <input type="checkbox"/> 07 <input type="checkbox"/> 09 <input checked="" type="checkbox"/> Blank <input type="checkbox"/> 02 <input type="checkbox"/> 04 <input type="checkbox"/> 06 <input type="checkbox"/> 08 <input type="checkbox"/> 10			

Inactivating Student Records

The following outlines reasons for creating a Non-Eligible document and inactivating student records.

- If the child is evaluated for Part B Special Education Services and is found non-eligible, create an Eligibility-Not-Eligible document with the option “This student Is Not Eligible for Special Education because s/he does not meet state standards for a disability” and inactivate the Student with the option of “Transferred to Regular Education”.
- If the child is evaluated for Part B Special Education Services and is found eligible but the parent refuses special education services, create an Eligibility-Not Eligible document and choose the option “This student Is Eligible for Special Education because s/he meets the State of Tennessee's eligibility standards for: _____; however, the student's parent/guardian is declining services. This student will not receive special education or related services.” If the parent later requests for the student to be reconsidered for special education services, the student would be treated as an initial referral.
- If the child has a current Eligibility and IEP and the parent refuses services, generate an eligibility report-Not Eligible and choose the option “This student Is Eligible for Special Education because s/he meets the State of Tennessee's eligibility standards for: _____; however, the student's parent/guardian is declining services. This student will not receive special education or related services.” If the parent later requests for the student to be reconsidered for special education services, the student would be treated as an initial referral.
- If the child has a current Eligibility and IEP and the parent withdraws the student to attend a private school or homeschool, the team has three options:
 - If the child is attending a private school, the student may remain active and a Services Plan developed for special education services offered by the school district; or
 - If the child is in a homeschool setting, the student may remain active and an IEP developed for any special education services offered by the school district.
 - The team may inactivate the student by choosing “parent withdrawal/refused services”. With this option, the student’s eligibility remains intact and the LEA is required to re-evaluate every three years.
 - The team may initiate a re-evaluation and determine that the student is no longer eligible by generating an Eligibility-Not Eligible document and choosing the option “This student Is Eligible for Special Education because s/he meets

the State of Tennessee's eligibility standards for: _____; however, the student's parent/guardian is declining services. This student will not receive special education or related services.” With this option, the student is no longer eligible for special education and/or related services and will be treated as a general education student. If the parent later requests for the student to be reconsidered for special education services, the student would be treated as an initial referral.

- If the child has an Initial Consent for Evaluation and the child moves before an evaluation is completed, inactivate the Student as ‘Moved, known to be continuing’. The next District may need to consult with previous District on evaluation results or contact TNDOE.
- The child is not evaluated for Part B Special Education Services. Inactivate the Student with the option “Transferred to Regular Education”.

Note: Eligibility and Non-Eligibility documents are created from the Eligibility Process Tab. Only the EasyIEP™ Administrator 2014, Psychologist 2014 and Certifying Specialist 2014 user types have permission to create the Final Eligible and Non-Eligible documents.

Inactivating a Student Record

1. If a Student does not qualify for services, an Eligibility-Non Eligible document is required before inactivating the Student in EasyIEP™. It's important to complete BOTH steps in this order.
2. Please see the EasyIEP™ End User manual for creating the Eligible-Non Eligibility document.
3. After creating the Eligible – Non Eligibility document, scroll down the page to the bottom of the Student’s Personal page, and click the ‘Make this Student inactive’ button. This step is required! When an eligible Student becomes ineligible, the Student is made inactive.

4. Enter the date exited and reason for exiting. The exit date must match the exit date in EIS.

5. Click ‘Update the Database’.

Students Eligibility Tab

Please refer to the EasyIEP™ End User Manual for information on the Student's eligibility data. The eligibility data is populated from the Eligibility Determination page and Eligibility Documents created on the Eligibility Process tab.

Student Compliance Symbols

Every Student in EasyIEP™ has a compliance symbol associated with their name. The compliance symbol is found in two places in EasyIEP™, the ‘Select a Student’ page and the Student’s Eligibility Process tab. Both are found next to the Student’s name.

When viewing a caseload, the compliance symbols are a quick way to view which Students are in or out of compliance, as well as Students who are approaching a due date. On the ‘Select a Student’ page, the compliance symbol is to the left of the Student’s name. On the Eligibility Process tab, the compliance symbol is located at the top of the page and to the right of the Student’s name

Select a Student [New Mail!](#)

	Proj Elig	IEP End	School	Grade	Name	Student ID	Age	Date Of Birth	Dis	Case Manager
	03/28/2011		TS	04	Alicia Test	333333333	8 Years	03/01/2000	1	Peter Smith
	03/03/2011	03/03/2009	TS		Tony Test	TEST0002	4 Years	03/01/2004	1,14	Peter Smith

(2 Students)

--no assigned school-- [Add new student to](#)

Eligibility Process Abbie Marie Test [New Mail!](#)

Referral

Evaluation

RTI² Evaluation for SLD

Eligibility Determination

Eligibility for Alternate Assessments

504, ESL, Private School Placement

Timeline Extension Request

Create Draft

Create Final

Print/View Documents

Common Compliance Symbols

	Meaning	What to do
	No Eligibility or IEP information is entered for this Student; this usually denotes a regular education Student.	To enter the Student into special education, fill in the eligibility page.
	All appropriate Eligibility and IEP information is entered for this Student.	Make sure the Student has a final IEP and option in the system.
	The Student has a new Proposed IEP and the system is waiting for the parent's response to be entered.	Confirm the parent's response is received and entered into the system. (Not used in TN.)
	The Student's new IEP is Rejected and a new one is Proposed.	Finalize a new IEP or modify the current IEP for the Student and propose this for acceptance. (Not used in TN.)
	The Student has a Rejected IEP and it has exceeded a set period of time after the rejection.	Finalize a new IEP or modify the current IEP for the Student. Make sure the newly proposed IEP is finalized. (Not used in TN.)
	A transferred Student is in the "warning" period before being out of compliance. Once the Student goes out of compliance, the standard stop sign symbol appears. The IEP team has 30 calendar days to finalize a new IEP.	In the new District, the Student is flagged with the new compliance symbol until an IEP is finalized. When the IEP is finalized, the compliance symbol shows the Student is in compliance (green check mark).
	After the Student is re-activated, the team has 30 calendar days to finalize a new IEP.	A team member must finalize an IEP for the reactivated Student using EasyIEP™ to bring the Student into compliance.
	Either 1) it is > 335 days since this Student's Last IEP Date, or 2) it is > 23 days since this Student's Eligibility Date and an IEP must be finalized (i.e. the Student's Last IEP Date field is empty).	When a User generates an IEP for a Student using EasyIEP™, the Last IEP Date is automatically updated.

	<p>Either 1) it is > 365 days since this Student's Last IEP Date, or 2) it is > 30 calendar days since this Student's Eligibility Date and an IEP must be finalized (i.e. the Student's Last IEP Date field is empty).</p>	<p>When a User generates an IEP for a Student using EasyIEP™, the Last IEP Date is automatically updated.</p>
	<p>It is > 20 school days since this Student's Initial Consent Received Date and Eligibility Determination is due.</p>	<p>When a Student's Eligibility status is determined, an Eligibility Document needs finalizing. The date of the Eligibility determination and disability is populated from the Eligibility document.</p>
	<p>It is > 40 school days since this Student's Initial Consent Received Date and Eligibility must be determined.</p>	<p>When a Student's Eligibility status is determined, an Eligibility Document needs finalizing. The date of the Eligibility determination and disability is populated from the Eligibility document.</p>
	<p>It is > 1035 calendar days since this Student's Eligibility Date. A triennial re-evaluation is due within 2 months.</p>	<p>When a re-evaluation is performed, an Eligibility Document needs finalizing. The date of the Eligibility determination and disability is populated from the Eligibility document.</p>
	<p>It is > 1095 calendar days (3 years) since this Student's Eligibility Date. A triennial re-evaluation is due.</p>	<p>When a re-evaluation is performed, an Eligibility Document needs finalizing. The date of the Eligibility determination and disability is populated from the Eligibility document.</p>

ECO Compliance Symbols

For the Early Childhood Outcome (ECO) Students, new ‘sub-compliance’ symbols are displayed for applicable Students on the Student results page. Students exiting ECO are flagged for IEP Team Members entering outcome information once Students are six years old. These are the business rules regarding when the new compliance symbols show for a Student:

	When any child who has ECO entrance data and at least six months of services turns 5 years, 6 months old, a yellow yield symbol with the number 6 is displayed as a reminder that ECO exit data should be collected.
	If the student is 5.5 to 6 years old and has outcomes information, green check sign is displayed.
	If the student is 6 years or older with outcomes information, they will also display a green check sign.
	When any child who has ECO entrance data and at least six months of services turns 6 years old and does not have complete ECO exit data, a red stop sign with the number 6 is displayed as a reminder that ECO exit data has not been collected.
	If a child is less than 5 years and 6 months old and has initial eligibility, a yellow question mark is displayed as a reminder to collect ECO entrance data for the initial IEP.
	If a child is less than 5 years, 6 months old, has initial eligibility, and has an active IEP, a red X is displayed if no/incomplete ECO entrance data have been entered.

TEIDS Ages 0-3 Compliance Symbols

For the Tennessee Early Intervention Data Systems (TEIDS) Students, new ‘sub-compliance’ symbols are displayed for applicable Students on the Student results page. These symbols are created for Students entering/exiting TEIDS and flagged for IEP Team Members.

These are the business rules regarding TEIDS compliance symbols for a Student:

	When the child’s record is imported into EasyIEP™ from TEIDS, a yellow yield symbol with the number 3 is displayed indicating eligibility should be determined and, if eligible, an IEP developed by the child’s third birthday.
	If a child whose record imported into EasyIEP™ from TEIDS is 3 years and 1 day old without a finalized IEP, a red stop sign with the number 3 is displayed. The red stop sign will remain until an action is taken to determine the child’s eligibility and, if eligible, develop the IEP.

Deleting Student Documents and Events

Special Education Directors or EasyIEP™ Administrators may have the permissions to delete student documents created in error. Documents may be deleted from the student’s document page or the student’s history page. Documents located on the student’s document page with an ‘E’ to the left are defined as ‘events’ and may be deleted from the student’s history page. Only documents or events within 365 days old may be deleted by the assigned district administrator. All other documents or events older than 365 days old must be deleted by the EasyIEP™ help desk staff.

Delete Documents from the Documents tab

Delete a document from the student’s Documents tab by simply checking the box under the ‘Del’ column and click ‘Update the Database’ button. In the example below, documents 10627 and 10625 are mark for deletion.

Del	Doc ID	Date Generated	Generated By	Document	Received
<input type="checkbox"/>	10634	04/19/2013	Samantha Law	IEP	PDF (Draft)
E	10633	04/12/2013	Sheryn Ordway	IEP Addendum	PDF <input type="checkbox"/>
<input checked="" type="checkbox"/>	10627	04/08/2013	Sheryn Ordway	Reevaluation Related Service Observation	PDF <input type="checkbox"/>
<input checked="" type="checkbox"/>	10625	04/08/2013	Sheryn Ordway	Reevaluation Related Service Observation	PDF <input type="checkbox"/>
<input type="checkbox"/>	10624	03/26/2013	Sheryn Ordway	Restraint Document	PDF <input type="checkbox"/>

Accessing the Student History page

The Student History page is accessed by clicking the Compliance Symbol on the Student Search page or clicking the compliance symbol on the Eligibility Process tab. Examples are shown below.

Select a Student

Log Out Main Menu Students My Docs Wizards Schools School System Users									
Select a Student New Mail!									
CP	Proj Elig	IEP End	School	Grade	Name	Student ID	Age	Date of Birth	
	✓ ✓	01/23/2016	05/20/2013	SS	07	Abbie Marie Test	4441208	12 Years	11/16/2000

Eligibility Process Tab

Eligibility Process	Abbie Marie Test
	New Mail!

Student History Page

The Student History page provides a historical listing of all events created for a specific student. Events are sorted chronologically by the Event Date on the Student History page. If an event has the same Event Date then it is sorted by the Begin Date and then by the Date Created. Only events within the past 365 days can be deleted by the district administrator. Events from previous years should not be deleted from the Student History unless they are incorrect. It is important to keep previous events in the Student’s History.

Student History for Mary K Test									
Del	Event ID	Event Date*	Event Type	Begin Date	End Date	User	Document	Date Created	
<input type="checkbox"/>	62014	01/04/2004	Eligibility Determination	01/04/2004	01/04/2007	Mike Test		2006-01-05 15:54:00 (326 days)	Details
<input type="checkbox"/>	62032	02/26/2004	IEP	02/26/2004	02/26/2005	Mike Test		2006-11-27 11:33:00 (0 days)	Details
<input type="checkbox"/>	62002	01/03/2006	IEP	01/03/2006	01/03/2007	Mike Test	IEP	2006-01-03 09:39:00 (328 days)	Details
<input type="checkbox"/>	62003	01/03/2006	IEP Update	01/03/2006	01/03/2007	Mike Test	IEP	2006-01-03 09:40:00 (328 days)	Details
<input type="checkbox"/>	62033	11/27/2006	Progress Report (2005 rp 1)			Mike Test	Progress Report	2006-11-27 11:38:00 (0 days)	Details
<input type="checkbox"/>	62034	11/27/2006	Progress Report (2005 rp 2)			Mike Test	Progress Report	2006-11-27 11:39:00 (0 days)	Details
<input type="checkbox"/>	62023	09/03/2006	School Change (Test School)	09/03/2006				2006-09-03 11:02:00 (85 days)	Details
<input type="checkbox"/>	62024	09/03/2006	Grade Change (9th Grade)	09/03/2006				2006-09-03 11:02:00 (85 days)	Details

Deleting Events

Delete an event from the student history page

Events are created when an IEP document is finalized, Eligibility Determination is finalized or there is a change in School/Grade level for the student. Draft documents do not appear on the Student History page. There are a few instances when an event is deleted from the Student History page:

- A clerical error was made and a new IEP or Eligibility document was created to replace the incorrect document.
- Duplicate documents are created. There should only be one IEP each year for a student with the exception of IEP Addendums. In the Student History screenshot above, Events 62002 and Event 62003 are duplicate events. The two events have the same Event Date and Begin Date and were created one minute apart from each other.
- There is a manual event in the Student History, meaning there is a not a final document associated with the IEP. Event 62032 in the Student History screenshot above is a manual event.

1. Check the 'Del' box next to the Events that need to be deleted.

<input type="checkbox"/>	62002	01/03/2006		IEP	01/03/2006		01/03/2007		Mike Test	IEP	2006-01-03 09:39:00 (328 days)	Details
--------------------------	-------	------------	--	-----	------------	--	------------	--	-----------	-----	-----------------------------------	---------

2. Click Update the Database

Delete an IEP that has associated Progress Reports

If an IEP needs deleting and there are Progress Reports associated with it, the Progress Reports must be deleted before the system will allow the deletion of the IEP. It is recommended the progress reports be printed or saved to your computer and attached to the student's document page with Paperclip.

1. Check the 'Del' box for all the Progress Reports that are associated to the IEP that needs to be deleted.

	62003	01/03/2006		IEP	Update	01/03/2006		01/03/2007		Mike Test	IEP	2006-01-03 09:40:00 (328 days)	Details
<input type="checkbox"/>	62033	11/27/2006		Progress Report (2005 rp 1)						Mike Test	Progress Report	2006-11-27 11:38:00 (0 days)	Details
<input type="checkbox"/>	62034	11/27/2006		Progress Report (2005 rp 2)						Mike Test	Progress Report	2006-11-27 11:39:00 (0 days)	Details

2. Click 'Update the Database'.
3. Check the 'Del' box for the IEP that needs to be deleted.

<input type="checkbox"/>	62003	01/03/2006	 IEP	<input type="button" value="Update"/>	01/03/2006		01/03/2007	 Mike Test	IEP	2006-01-03 09:40:00 (328 days)	<input type="button" value="Details"/>
--------------------------	-------	------------	---	---------------------------------------	------------	---	------------	---	---------------------	-----------------------------------	--

4. Click 'Update the Database'.

Student Transfers

Districts have the ability to request Student transfers through the Message Board. First, the previous School District must inactivate the Student. Please contact the previous School District and request the Student inactivation. Next, submit a request to the Message Board to transfer Student demographics, documents, and workspace information. Each transfer request message shall have a maximum of five Student records. For those Districts that may have a large constituency of their Student population moving to another District (for example, city vs. county schools), please send a message to the EasyIEP™ Message Board and request instructions on how your District should handle such a mass transfer.

- Active Student records cannot be transferred. Please ensure the previous District inactivates the Student record before posting a transfer request.
- To request an IEP transfer, include the Student's name, date of birth and previous school District.
- When a Student is transferred to a new District, a new IEP is finalized to create an option of service in the new District. First, update the Providers and Service Dates™ selected on the Services page. Also update the Goals and Objectives dates and details. Then finalize a current IEP.
- When transferring a student between district sites and back, the intention is for the data to be left as-is in the original site, but any new data that was added in the district the student is transferring from will be added. The transfer process will not modify any existing data in the original site, (i.e. new dates for services, etc.) if that data was on the student's records prior to the first transfer. This has been part of the design of the student transfer system since it was developed. Workspace, Documents and Events get transferred. Historical data does not.

District Student Transfer Contact List

The EasyIEP™ Help Desk maintains a 'District Student™ Transfer Contact List' to assist District personnel in notifying the Student's previous District, when the Student has transferred to another District. Please identify the person in your District to contact, when a Student needs an inactivation to complete a transfer. Please review the 'District Student Transfer Contact List' for the correct information. The most current version of the 'District Student Transfer Contact List' is located on the Main page of EasyIEP™. If there are changes to the contact information for your District, please send a message to the EasyIEP™ Message Board with the changes and the correct contact information.

Out-of-State Transfer Process

When a Student transfers from out of state and there is evidence (i.e., IEP or Eligibility Report) that the Student has a disability, the current School District must provide the Student with services comparable to those described in the IEP from the previous School District.

The Student is enrolled in EasyIEP™ and should continue to receive comparable IEP services until an updated eligibility determination is completed.

1. On the Eligibility Process tab, enter a current Referral Date and Initial Consent for Evaluation Received date.
2. Complete the Reevaluation Summary Report to review existing evaluation data.
3. If previous evaluations are complete and sufficient for establishing eligibility according to Tennessee State Standards, complete the Eligibility Determination page and then create an Eligibility document.
4. If the previous evaluations are not complete or sufficient for establishing eligibility according to Tennessee State Standards, on the Referral page check the box for 'Out-of-state transfer.' Complete the Eligibility determination page and create a 60 day Eligibility Out-of-State document.
5. If comparable services can be provided, accept the IEP from out-of-state and enter into EasyIEP™ with a begin date of the Student's enrollment date in the school system. If comparable services cannot be provided, accept the IEP from out of state until a new IEP is developed and implemented. If you do not have the IEP from out-of-state, create a new IEP with services to accommodate the Student's needs.
6. When the Reevaluation Summary Review or Comprehensive Assessment is completed, create the following documents in EasyIEP™:
 - 1) Create a new Eligibility Determination document with the current eligibility determination date and disability, and
 - 2) Create a new IEP with the current date and data collected from the Reevaluation/Assessment.

Note: Most transfer students are treated as a reevaluation. Only when a comprehensive assessment is needed will students be initially evaluated under state of Tennessee criteria.

BEP Funding Options

Troubleshooting Options

A Student’s BEP funding option is displayed at the bottom of the Personal page. The options funding table contains information regarding the Student’s primary and secondary options, the option begin date and the percent of day.

--- Current Funding Option ---

Primary Option	Secondary Option	Option Begin Date	Percent of Day
02		10/14/2010	3

Resend current option(s) to EIS
 EIS Enrollment Year: 2011

To determine the EIS Enrollment Year:
2009 = 2009-2010 School Year
2010 = 2010-2011 School Year

 Sent to EIS
 TEIS Program

1. Select the ‘Details’ button in the options table to see the Student’s option history.
2. The option details displays a Student’s option history, IEP document(s) and option begin date(s).

Funding Options History for							New Mail!
Event ID	Event Date	IEP Document	Primary Option	Secondary Option	Option Begin Date	Percent of Day	
718025	04/04/2011	IEP	03		08/10/2011	17	
718025	04/04/2011	IEP			05/26/2011	0	
718025	04/04/2011	IEP	02		04/04/2011	9	
714374	03/31/2010	IEP Addendum	02		12/17/2010	9	
689639	03/31/2010	IEP Addendum	02		12/17/2010	9	
714374	03/31/2010	IEP Addendum	03		03/31/2010	19	
689639	03/31/2010	IEP Addendum	03		03/31/2010	19	
686725	03/31/2010	IEP	03		03/31/2010	14	
584742	03/31/2010	IEP	03		03/31/2010	14	

- A User can determine every time a Student's option changes and the date the option(s) changed.
- If a Student is identified with no option or incorrect option, select the Services and Supplemental Aids page from the IEP Process tab.

Log Out | Main Menu | Students | My Docs | My Reports | Wizards | Schools | School System | Users | My Info | 
 Students | Personal | Eligibility Process | **IEP Process** | Early Childhood | Documents | Restraints/Isolations | View Restraint Incidents

- Change the 'View' from 'Workspace' to 'Current IEP'.

Services and Supplemental Aids Abbie Marie Test [New Mail!](#)

View: Workspace
Current IEP / IFSP
Previous IEP / IFSP
Other IEP / IFSP

Special Ed Services	Num Sessions / Session Length	Consultation	ESY	Pct	Start Date / End Date	Provider	Location
Academics	1 per W 30 min	<input type="checkbox"/>	<input type="checkbox"/>	1.43	02/06/2015 02/06/2016	Andy Test	Regular Ed Setting - Inclusion
Speech and Language	2 per W 30 min	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	07/01/2015 08/01/2015	Andy Test	Regular Ed Setting - Inclusion

- Check to make sure that the IEP in this view has the correct IEP Meeting, Begin and End Dates.

Services and Supplemental Aids Abbie Marie Test [New Mail!](#)

View: Current IEP / IFSP (from IEP Meeting: 01/12/2015 Begin: 01/12/2015 End: 05/21/2015)

Pos	Special Ed Services	Num Sessions / Session Length	Consultation	ESY	Pct	Start Date / End Date	Provider	Location
1	Academics	1 per W 30 min	No	No	1.43	01/12/2015 05/21/2015	Andy Test	Regular Ed Setting - Inclusion

- Confirm service begin and end dates fall within the date range of the current IEP. Verify the provider and location information is correct.

No option / Incorrect option calculates if:

1. IEP document is not finalized.
2. A service's begin date is prior to the IEP begin date or service's end date is after the IEP end date.
3. Services have future dates.
4. An incorrect 'Session Length' or 'Number of Sessions' is entered.
5. The correct 'Location of Service' or 'Provider' is chosen.
6. A 'Special Ed Service' is entered as a 'Related Service' or vice versa.

Correcting an Options problem

1. Select the 'Workspace' view and correct any errors on the Services and Supplemental page.

Services and Supplemental Aids										Abbie Marie Test	
View: Workspace										New Mail!	
Special Ed Services											
Del	Pos	New Position	Special Ed Services	Num Sessions / Session Length	Consultation	ESY	Pct	Start Date / End Date	Provider	Location	Serving School (* denotes external school)
<input type="checkbox"/>	1		Academics	1 per W 30 min	<input type="checkbox"/>	<input type="checkbox"/>	1.43	02/06/2015 02/06/2016	Andy Test	Regular Ed Setting - Inclusion	- Assigned School -
<input type="checkbox"/>	2		Speech and Language	2 per W	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	07/01/2015	Andy Test	Regular Ed Setting - Inclusion	- Assigned School -

2. Click 'Update the database'.
3. Return to the IEP Process page and finalize a new IEP. Changing the workspace only without finalizing an IEP document does not change the option. A new finalized IEP reflecting the changes is required before the option calculates correctly.
4. Unless there were errors, enter the Meeting, Begin and End Date information to match the original IEP.

 Changes to IEPs including service changes, census changes, and disability changes require you to finalize a new IEP.

Note: After a new Final IEP is created with the appropriate modifications the former duplicate IEP must be deleted from the Student's history page.

Isolation and Restraint Tabs

Beginning August 2012, School Districts are required to enter the Isolation/Restraint data in EasyIEP™ and report to the state. School District's first report to the state is due 6/30/2013. The schools continue to report Isolation/Restraint data up to the District level two times a year.

Access to Isolation/Restraint is automatically assigned to various user type permissions.

Links available to follow the reporting rules for Isolation and Restraint are as follows:

[Isolation and Restrain Reporting, Rule](#)

<http://state.tn.us/education/speced/doc/61511chapt457.pdf>

<http://state.tn.us/education/speced/doc/61511457illustrativ.pdf>

Notes: The Isolation/Restraint forms are setup to record names of up to two staff members involved in a restraint or isolation event. Only two staff member names print on the Isolation/Restraint document. Other staff members involved with the Isolation/Restraint can be written on the printed document.

There is currently no requirement to report names of Students who witness restraint or isolation events. Staff or substitute staff who witness restraint or isolation events may be added on the User tab in EasyIEP™ for reporting purposes.

The Staff Person involved with the Isolation/Restraint may be a User in EasyIEP™. If not listed as a User in EasyIEP™, add as a new User and assign a User type of Isolation/Restraint Participant 2014. Information required: First Name, Last Name, User Code and User type. Staff members not showing as a User in EasyIEP™ may be hand written on the printed Isolation/Restraint document.

'Location of Restraint' list is easily configured for adding other specific locations at each District level

Restraint Notes do not print on the document.

Isolation and Restraint Documents created for a Student are located on the Documents tab.

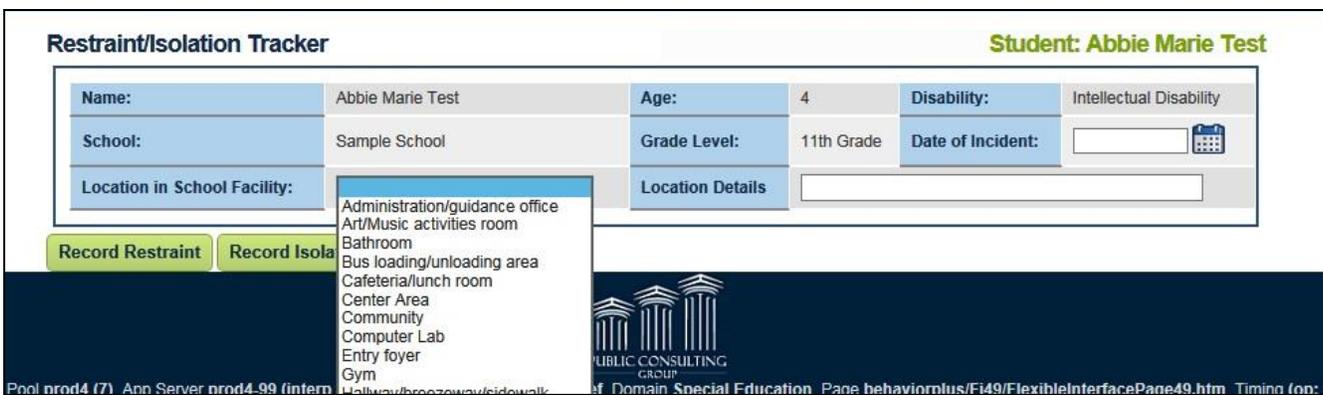
File the Isolation/Restraint documents where the District currently files Isolation/Restraint information for each Student.

Add an Isolation or Restraint event:

1. Click on the Restraint/Isolations tab.



2. Select from the dropdown list the 'Location in School Facility' where the Isolation or Restraint incident occurred.



3. Enter the Date of the incident.
4. Click 'Record Restraint' or 'Record Isolation'.



5. Continue to enter the Isolation or Restraint information.

6. Create a draft or final document. Documents are located at the bottom of the Restraint/Isolation creation page or the Documents tab.

Isolation Notes:
notes

Date Generated	Document Type	Type	Generated By
03/06/2015	Isolation Document	(Draft)	Blake Shearer

Create Draft Report **Create Final Report**

7. Restraint or Isolation data is edited by selecting the appropriate incident from the 'View Restraint Incidents' or 'View Isolation Incidents' tab.
8. From the View Restraint Incidents tab, select the appropriate event to edit and click the Details button.

Student Incident History Student: Abbie Marie Test

Open
 Closed

Incident Category:
Incident School:

Update Incident Table

Date Range

From:
To:

Incidents

Note - Highlighted rows are classroom incidents

Incident Date	School	Incident	ID	Manager / Level	Student	Role	Status/Details
01/24/2013	Sample School	Isolation		Sheryn Ordway 'School District'	Abbie Marie Test	Student	Students Identified Details
03/01/2013	Sample School	Restraint		Samantha Law 'School District'	Abbie Marie Test	Student	Students Identified Details
03/04/2013	Sample School	Isolation		Sheryn Ordway 'School District'	Abbie Marie Test	Student	Students Identified Details
03/04/2013	Sample School	Restraint		Sheryn Ordway 'School District'	Abbie Marie Test	Student	Students Identified Details
03/05/2013	Sample School	Restraint		Samantha Law	Abbie Marie Test	Student	Students Identified Details

- Editing the Restraint or Isolation information requires clicking on the Details button on the 'Incident Details' screen.

Incident Details

Students Involved in the Incident

Student: Abbie Marie Test: Student		
ID:	DOB:	Role in Incident:
TEST1111	09/01/2010	Student
Special Ed:	504:	
Yes	No	

Isolation: Office Reason: Protect Physical Safety of Others Duration (min): 14 Details Completed

[Show Incident Manager History](#)

[Return to Main Incident Page](#)

- After the information is corrected, create another draft or final document.

Isolation Notes:
notes, corrections made

Date Generated	Document Type	Type	Generated By
03/06/2015	Isolation Document	(Draft)	Blake Shearer

Create Draft Report Create Final Report

Note: To delete any incorrect Isolation/Restraint incidents or Documents, contact the EasyIEP™ Help Desk.

My Docs Tab

The My Docs tab displays the Case Manager’s Student documents. This tab allows Case Managers to view and print all documents for Students on their caseload.

From the Main Menu click the My Docs tab



The My Docs tab contains documents the Case Manager or IEP Team member has created for a Student. This tab allows the User to view and print documents without going to each Student’s document page to view and print documents. Below is an example of the My Docs tab after documents are created for a Student(s). Clicking on the document name opens the document with Adobe Acrobat Reader.

Documents for Students of **Blake Shearer**
 [New Mail!](#)

This page lists documents you’ve created, or that were created by someone else for students for whom you are the Case Manager, within the past year (including draft documents that have not expired), or a subset of those documents if the search page was used or if coming from the Progress Report Wizard. This page appears immediately after running the Progress Report Wizard, and can always be accessed by using the "My Docs" button in the menu above. To print a document, click on the "Document Type" entry in the list, then use the printer icon that appears in the toolbar that appears directly above the document itself.

Date Created	Created By	Student	Batch	Document	Year / Report Pd	Status
03/06/2015	Blake Shearer	Abbie Marie Test	<input type="checkbox"/>	Isolation Document	PDF	(Draft)
02/23/2015	Sheryn Orday	Blake Test	<input type="checkbox"/>	Timeline Extension Request (consent on or after 1/29/2014)	PDF	Proposed

(2 Documents)

[View Document Batch](#)

Batch Printing

Batch printing allows Users the selection of specific Student documents and printing all at one time. To print documents in a batch:

1. Click on the My Docs tab.
2. Under the ‘Batch’ column, check the box next to each document to print.
3. Select the ‘View Document Batch’ button. The documents selected open as a single PDF file in Adobe.
4. To print selected documents, use the ‘Print’ icon on the Adobe toolbar.

Documents for Students of **Blake Shearer**
[New Mail!](#)

This page lists documents you've created, or that were created by someone else for students for whom you are the Case Manager, within the past year (including draft documents that have not expired), or a subset of those documents if the search page was used or if coming from the Progress Report Wizard. This page appears immediately after running the Progress Report Wizard, and can always be accessed by using the "My Docs" button in the menu above. To print a document, click on the "Document Type" entry in the list, then use the printer icon that appears in the toolbar that appears directly above the document itself.

Date Created	Created By	Student	Batch	Document	Year / Report Pd	Status
03/06/2015	Blake Shearer	Abbie Marie Test	<input checked="" type="checkbox"/>	Isolation Document	PDF	(Draft)
02/23/2015	Sheryn Ordway	Blake Test	<input checked="" type="checkbox"/>	Timeline Extension Request (consent on or after 1/29/2014)	PDF	Proposed

(2 Documents)

[View Document Batch](#)

Wizards Tab

Wizards are tools used to simplify the process of creating the same document for multiple Students.

Log Out | Main Menu | Students | My Docs | My Reports | **Wizards** | Schools | School System | Users | My Info |

Students | Personal | Eligibility Process | IEP Process | Early Childhood | Documents | Restraints/Isolations | View Restraint Incidents

Progress Report Wizard (Report Card)

This wizard creates Progress Reports for a Case Manager's Students. Only the Case Manager's Students show in the list of available Students. Other IEP Team members are able to update the status of goals and/or objectives for Students on Team member's caseload.

1. From the Main Menu click the Wizards tab.
2. Click the 'Progress Report Wizard' link.

Log Out | Main Menu | Students | My Docs | My Reports | **Wizards** | Schools | School System | Users | My Info |

Available Wizards [New Mail!](#)

[Progress Report Wizard](#)

[IEP At-a-Glance Wizard](#)

[Caseload Setup Wizard](#)

[Caseload Administration Wizard](#)

[Ad Hoc Report Wizard](#)

- The School Year field defaults to the current school year. Additionally, Users are able to select a prior school year accommodating ESY progress reporting. The system limits the number of Progress Report Periods in the prior school calendar available for ESY progress reports.

Progress Report Wizard (Select Students)

[New Mail!](#)

This wizard will guide you through generating Progress Reports for your students.

Please be sure to select the correct Reporting Period.

School Year: 2014-2015

Reporting Period:

- Progress Reporting Period 1
- Progress Reporting Period 2
- Progress Reporting Period 3
- Progress Reporting Period 4
- Reporting Period 5
- Reporting Period 6
- Reporting Period 7 Summer

- Select the students for whom you would like to update status.
- Students that do not have a currently valid final IEP / ISP / IFSP.
- Students who transferred into this school system with even information may show as having a current IEP / ISP / IFSP, but need a new IEP / ISP / IFSP before a Progress Report can be generated.

Check All
Check None

Calvin David Test
 Joe Christopher Test
 Joey Jones Test

- Users are required to select a reporting period before creating a progress report. Progress Report Wizard no longer defaults to current reporting period.
- Select the Student(s) to update their status and/or generate Progress Reports.
- Click the 'Continue' button.
- Select a Status for each Annual goal, enter a 'Status Narrative', select a Status for each Objective, enter the 'Target Percent', enter a 'Status Summary Narrative' if applicable and enter the 'Date Sent to Parent'

Progress Report for Beth3 SummerUpdates Test (2011-2012 - Reporting Period 1 Fall) (Student 1 of 2)

[Skip this student](#)

Annual Goal: Narratives for Beth3 SummerUpdates Test NOTE: Each "Update the Database" button, when pressed, will update all data entered on this page. Current Descriptive Information Last Updated By: (none)

Status: Anticipate Meeting Goal by IEP End Last Updated On: (none)

Status Narrative: Narrative [Add](#)

Objective	Status	Target %
Add Custom Objective(s) for Beth3 SummerUpdates Test Add Custom Objective(s) for Beth3 SummerUpdates Test Add Custom Objective(s) for Beth3 SummerUpdates Test	3. Some Progress Being Made	85

Status Summary Narrative: Status Summary Narrative [Add](#)

Date Sent to Parent/Guardian: 08/02/2011 [Add](#)

[Just Update the Database](#)

[Update and Move to Next Student](#)

8. Select the 'Update and Move to Next Student' button to save the Progress Report.
9. Select the 'Just Update the database' button to save the Progress Report. This does not move to the next Student.

Caseload Administration Wizard

1. From the Main Menu click the Wizards tab.



2. Click the Caseload Administration Wizard link.



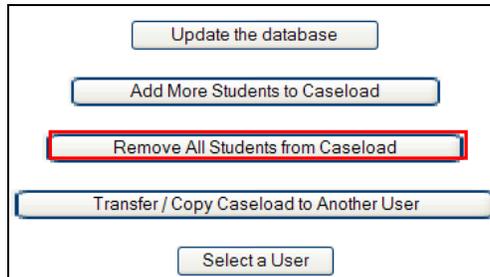
3. Search for the User by 'School', 'User Type', 'Last Name', 'Title', and/or 'User Code'. Select the User by clicking on the appropriate name.
4. The Current Caseload page appears.
5. Use the 'Check All' and 'Check None' buttons as needed.

Case Manager		Team Member		Student	School	Grade	DOB	Current Case Manager
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Albert Einstein	SCE	P4	02/03/2004	Peter Smith

6. Click the 'Update the Database' button to save information and leave the page.
7. Click the 'Add More Students to Caseload' button to search for more Students to place in a User's caseload.

Removing Students from a Caseload

1. To remove Students from a caseload, click on the 'Remove All Students from Caseload' button.

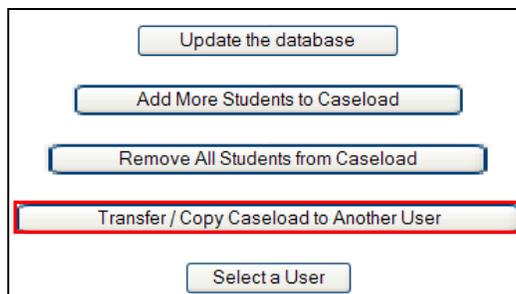


2. A confirmation page appears, asking for confirmation of the removal.

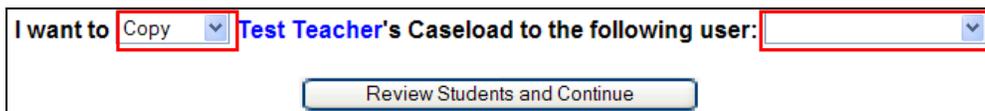


Transfer/Copy Caseload

1. To transfer or copy a caseload, click on the 'Transfer/Copy Caseload to Another User' button.



2. To copy a caseload select 'Copy' in the first dropdown and then select the User in the second dropdown.



3. To transfer a caseload select 'Transfer' in the first dropdown and then select the User in the second dropdown.

I want to Transfer ▼ **Test Teacher's Caseload to the following user:** ▼

Note: When Transfer is selected, the dropdown lists only shows Users with access to all the schools that Students on the source User's caseload attend.

4. Click the 'Review Students and Continue' button.

Additional Tracking of Caseload Changes

The system now keeps a record of User's caseload changes. This information can later be used to generate reports, notifications, or dashboards alerting Users to the changes in their caseload.

Recent Caseload Changes to the Caseload of Calvin Anderson				
Student	Student Code	Date of Change	Add/Remove	Triggering Event
Nicholas Stanley	STU188JHE	01/27/2009 17:14:00	Add	IEP Team Page
Cecil Stanley	STU40JHE	01/27/2009 17:11:00	Add	IEP Team Page

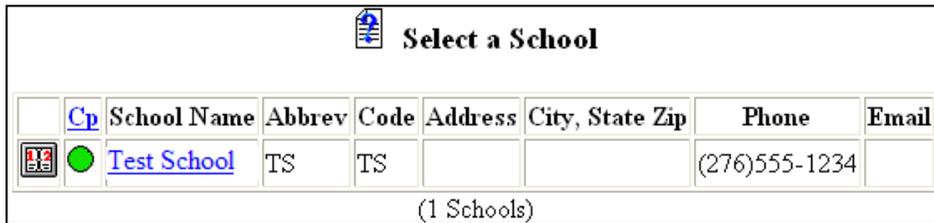
Schools Tab

View School Information

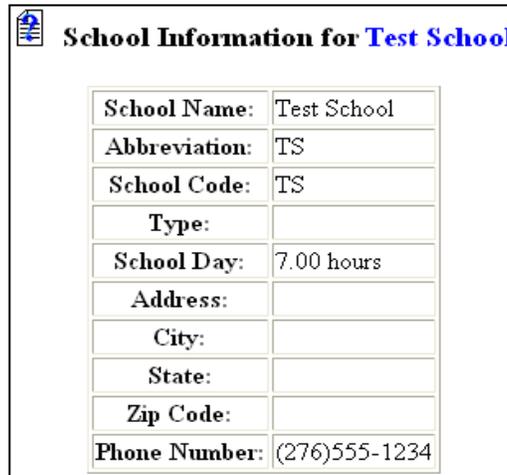
- From the Main Menu click the Schools Tab.



- Click on the School name to view the School information.

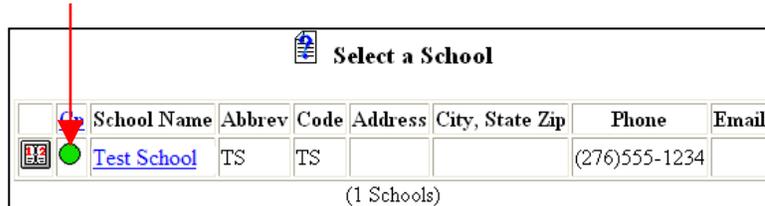


- The Schools information is available for viewing. To change this information, submit a request to the Message Board.

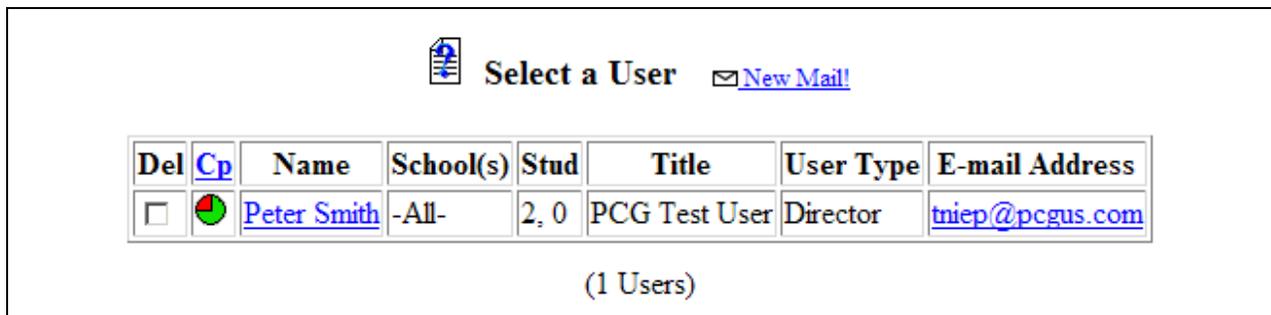


View School Compliance

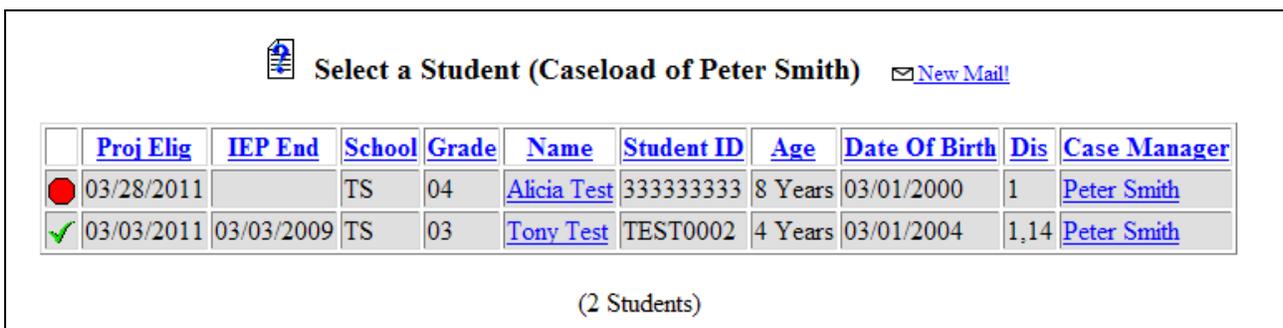
1. On the Schools tab click on the compliance symbol to the left of the School name.



2. A list of all Users in the School appears.
3. Clicking on the User's name shows the User's information and clicking on the compliance symbol shows a list of the User's caseload. This is a way to view which Students may need a new IEP or Eligibility Determination.



4. Click on the Student's compliance symbol to view the 'Student History Page' showing the Student's events created in EasyIEP™.



[Student History for Tony Test](#) [New Mail!](#)

Event ID	Event Date*	Event Type	Begin Date	End Date	User	Document	Date Created	
83205	03/03/2008	Written Parental Permission Received			Athane Keovilay		2008-03-26 06:57:00 (7 days)	Referral Source: Parent
83206	03/03/2008	Eligibility Determination	03/03/2008	03/03/2011	Athane Keovilay		2008-03-26 06:57:00 (7 days)	Details
83220	03/03/2008	IEP <input type="button" value="Update"/>	03/03/2008	03/03/2009	Peter Smith	IEP (ID# 17662)	2008-03-26 11:27:00 (7 days)	Details
83222	03/26/2008	Progress Report (2007 rp 8)			Peter Smith	Progress Report (ID# 17665)	2008-03-26 11:40:00 (7 days)	Details
83203	03/26/2008	School Change (Test School)	03/26/2008		Athane Keovilay		2008-03-26 06:55:00 (7 days)	Details
83204	03/26/2008	Grade Change (3rd Grade)	03/26/2008		Athane Keovilay		2008-03-26 06:55:00 (7 days)	Details

Update School Information

To update EasyIEP™ in preparation for a new school year, review the list of Schools and School information, including length of school day, address, phone number, and fax number. Additionally, enter the new school year District Calendar with associated ADM Reporting Periods.

1. From the Main Menu page click on the Schools tab.



2. Post a message to the Message Board requesting a school addition, deletion or update. Provide information about the new School in your message, including:
 - School Name
 - School Code Number
 - Type of School (Elementary, Private Residential Facility, Public Separate School, etc.)
 - Length of School Day
 - Address
 - Phone Number
 - Fax Number
 - Email Address

Note: Add new Schools before adding new Students and new Users. This ensures the new Schools are listed and available for assignment to Students and Users. The new Schools must be added in EIS as an active School before the School is added as an active School in EasyIEP™.

If any School has a different School Calendar than the main District Calendar, the District must add a Custom School Calendar for the specific School(s).

Calendar

A new District Calendar is essential for each school year. Follow the steps below for adding a new District Calendar in EasyIEP™.

1. Add the new school year to the Calendar. Click on the Calendar icon on the main menu bar. Scroll to the bottom and click on the 'Edit School Years' button.

Help | Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User | **Calendar** | PCG

Month: May Year: 2009

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					* 1	2
3	* 4	* 5	* 6	* 7	* 8	9
10	* 11	* 12	* 13	* 14	* 15	16
17	* 18	* 19	* 20	* 21	* 22	23
24	* 25	* 26	* 27	* 28	* 29	30
31						

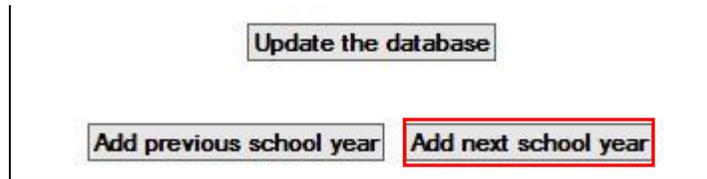
Legend: = * school day = holiday = teacher workday = teacher inservice = abbreviated school day = Snow Day = weekend = * summer

* = Services Provided

[Edit School Years](#)

2. Scroll to the bottom and Click the 'Add next school year' button to add the new school year.

Edit School Years								New Mail
Del	School Year	Begin Date	End Date	Cal Days	Sch Days	ESY Schedule	Report Periods	Report Periods (ADM Reporting Periods)
	2011-2012	08/03/2011	05/28/2012	300	179	Edit	Edit	Edit
<input type="checkbox"/>	2012-2013	08/04/2012	05/25/2013	295	209	Edit	Edit	Edit
<input type="checkbox"/>	2013-2014	08/03/2013	05/25/2014	296	209	Edit	Edit	Edit
<input type="checkbox"/>	2014-2015	07/01/2014	06/30/2015	365	260	Edit	Edit	Edit



It is crucial to have at least three future Calendar years in the list of school years. The future school years are used with the calculation of the Project IEP Date and Projected Eligibility Date located on the Student’s Eligibility Process/Referral page.

Future Calendars use temporary ‘place holder’ dates that are easily updated when your school board determines the actual District Calendar dates. A good set of placeholder dates are the federal reporting period dates of July 1 as begin date and June 30 of the following year as the end date.

When the actual District Calendar dates are determined by the school board, enter the first instructional date as the begin date for the current school year on the School years page.

3. Enter the ‘Begin Date’ and ‘End Date’ for the new school year. Click on the Calendar icon again to return to the ‘Calendar’ view page. When the actual District Calendar dates are determined by the school board, enter the first instructional date as the begin date for the current school year on the School years page.

	2011-2012	08/03/2011	05/28/2012	300	179	Edit	Edit	Edit
<input type="checkbox"/>	2012-2013	08/04/2012	05/25/2013	295	209	Edit	Edit	Edit
<input type="checkbox"/>	2013-2014	08/03/2013	05/25/2014	296	209	Edit	Edit	Edit
<input type="checkbox"/>	2014-2015	07/01/2014	06/30/2015	365	260	Edit	Edit	Edit

Updating the school year Calendar dates on the ‘Edit School Years’ page sets all of the week days to instructional school days (green). Additionally, the District needs to enter any non-instructional days and summer days.

- Select the 'Month' and 'Year' to view each month of the school year. Click on a specific date to identify as a non-school day.

Month: September		Year: 2012				
Day	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
	* 3	* 4	* 5	* 6	* 7	8
	* 10	* 11	* 12	* 13	* 14	15
	* 17	* 18	* 19	* 20	* 21	22
	* 24	* 25	* 26	* 27	* 28	29

Legend: ■ = * School Day ■ = Holiday ■ = Teacher Workday ■ = Teacher Inservice ■ = * Abbreviated School Day ■ = Snow Day ■ = Weekend ■ = Summer

- Select the 'Day Type' from the drop down menu options and enter a 'Label' to appear on the Calendar.

Edit Day Type 9/3/2012 [New Mail!](#)

Level	Day Type	Label
School System	Holiday	Labor Day Holiday

- Click 'Update the database'.
- To mark multiple days as non-school days, click on the first date in the series.

8. Select the 'Day Type' from the drop down menu options and enter a 'Label' to appear on the Calendar. Enter the date range using the format described in the 'Note' and in the example below. Click 'Update the database' to save changes. Continue through each month in the District Calendar from the first day of school to the last day of school. Finally, when all days are marked to accurately reflect the new school year Calendar, continue with the next step: 'Setup ADM Reporting Periods'.

Log Out | [Main Menu](#) | [Students](#) | [My Docs](#) | [Wizards](#) | [Schools](#) | [School System](#) | [Users](#) | [Super User](#) |

Edit Day Type 10/15/2012 ✉ New Mail!

Level	Day Type	Label
School System	Holiday ▼	Fall Break

NOTE: To change the **Day Type** and **Label** for multiple days at once, please enter a date range in the format mm/dd/yyyy - mm/dd/yyyy. You can also enter multiple date ranges separated by a comma. If you use this feature, the day that you selected in the calendar (10/15/2012) will only be included if occurs in one of the date ranges you enter. Also note that if you add any calendar entries below (where it says "New Calendar Entries:"), they will only be added to the date 10/15/2012, not to dates in the date ranges you enter here.

10/15/12-10/19/12

Be sure to mark Summer days with a day type of Summer. Summer days may include the last of May, June, July and beginning of August depending on the begin date of the next school year. It is important to mark Summer days because this effects the calculation of the Projected Eligibility Date and Projected IEP Date located on the Student's Eligibility tab.

Edit Day Type 6/1/2012 [New Mail](#)

Level	Day Type	Label
School System	Summer	

NOTE: To change the **Day Type** and **Label** for multiple days at once, please enter a date range in the format mm/dd/yyyy - mm/dd/yyyy. You can also enter multiple date ranges separated by a comma. If you use this feature, the day that you selected in the calendar (6/1/2012) will only be included if occurs in one of the date ranges you enter. Also note that if you add any calendar entries below (where it says "New Calendar Entries:"), they will only be added to the date 6/1/2012, not to dates in the date ranges you enter here.

6/1/12-7/31/12

All Summer days show as blue on the calendar.

Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User |

Calendar [New Mail](#)

Month: July Year: 2012

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Legend: ■ School Day ■ Holiday ■ Teacher Workday ■ Teacher Inservice ■ Abbreviated School Day ■ Snow Day ■ Weekend ■ Summer

* - Services Provided

[Edit School Years](#)

ADM Report Periods

After the new school year calendar is updated, setup your Basic Education Program (BEP) funding Report Periods. These periods are used to generate Average Daily Membership (ADM) by Option of Service (ADM by Option) reports for your District.

1. Click on the Calendar icon on the main menu bar. Click the 'Edit' button in the 'Report Periods (ADM Reporting Periods)' column for the new school year.

<input type="checkbox"/>	2010-2011	07/01/2010	06/30/2011	365	260	Edit	Edit	Edit
<input type="checkbox"/>	2011-2012	07/01/2011	06/30/2012	366	261	Edit	Edit	Edit
<input type="checkbox"/>	2012-2013	07/01/2012	06/30/2013	365	259	Edit	Edit	Edit

- To add 'ADM Report Periods' click the 'Add another reporting period' button. Click this button repeatedly until you have added nine (9) reporting periods. There are nine ADM Report Periods with twenty (20) school days each.

Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User |

Edit 2012-2013 ADM Reporting Periods Reporting Period Schedule (Tennessee Reference System)

Add another reporting period

Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User |

Edit 2012-2013 ADM Reporting Periods Reporting Period Schedule (Tennessee Reference System)

Del	Reporting Period	Reporting Period Name	Begin Date	End Date	Cal Days	Sch Days
<input type="checkbox"/>	1	ADM Reporting Periods 1	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	2	ADM Reporting Periods 2	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	3	ADM Reporting Periods 3	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	4	ADM Reporting Periods 4	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	5	ADM Reporting Periods 5	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	6	ADM Reporting Periods 6	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	7	ADM Reporting Periods 7	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	8	ADM Reporting Periods 8	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	9	ADM Reporting Periods 9	<input type="text"/>	<input type="text"/>		

NOTE: If you delete a given reporting period, ALL higher numbered reporting periods will also be deleted.

Update the Database

Auto-fill Begin and End Dates

Add another reporting period

- Scroll down and click the 'Auto-fill Begin and End Dates' button.
- Enter the first day of school as the 'Begin Date of Period 1', specify '20' for the 'Number of Days per Period', and check the box for 'Use School (working) Days'. Click 'Update the database'.

Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User |

Edit 2012-2013 ADM Reporting Periods Reporting Period Auto Fill Options (Tennessee Reference System)

Number of Reporting Periods:

Begin Date of Period 1:

Number of Days per Period:

Use School (working) Days:

Update the Database

- EasyIEP™ auto-fills the 'Begin Date' and 'End Date' of each period. The ADM Report Periods must align with the 20 day Instructional Reporting Periods in EIS and your SIS package. 'Report Period 9' may have more or less than 20 days, depending on the school calendar. Periods 1-8 are set to exactly 20 days for the ADM Report to generate correctly in EasyIEP™.

Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User |

Edit 2012-2013 ADM Reporting Periods Reporting Period Schedule (Tennessee Reference System)

Del	Reporting Period	Reporting Period Name	Begin Date	End Date	Cal Days	Sch Days
<input type="checkbox"/>	1	ADM Reporting Periods 1	08/01/2012	08/28/2012	28	20
<input type="checkbox"/>	2	ADM Reporting Periods 2	08/29/2012	09/26/2012	29	20
<input type="checkbox"/>	3	ADM Reporting Periods 3	09/27/2012	10/31/2012	35	20
<input type="checkbox"/>	4	ADM Reporting Periods 4	11/01/2012	11/30/2012	30	20
<input type="checkbox"/>	5	ADM Reporting Periods 5	12/03/2012	01/08/2013	37	20
<input type="checkbox"/>	6	ADM Reporting Periods 6	01/09/2013	02/06/2013	29	20
<input type="checkbox"/>	7	ADM Reporting Periods 7	02/07/2013	03/07/2013	29	20
<input type="checkbox"/>	8	ADM Reporting Periods 8	03/08/2013	04/12/2013	36	20
<input type="checkbox"/>	9	ADM Reporting Periods 9	04/15/2013	05/10/2013	26	20

NOTE: If you delete a given reporting period, ALL higher numbered reporting periods will also be deleted.

Progress Reporting Periods

1. Set up the Progress Report Periods to coordinate with your Progress Report or Report Card schedule. Click on the Calendar icon on the main menu bar. Scroll to the bottom and click on 'Edit School Years'. Click the 'Edit' button in the 'Report Periods' column for the new school year.

Edit School Years (Tennessee Reference System) en New Mail!

Del	School Year	Begin Date	End Date	Cal Days	Sch Days	ESY Schedule	Report Periods	Report Periods (ADM Reporting Periods)
	1997-1998	07/01/1997	06/30/1998	365	260	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
	2004-2005	07/01/2004	09/30/2005	457	326	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	2007-2008	07/01/2007	06/30/2008	366	248	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	2008-2009	07/01/2008	06/30/2009	365	260	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	2009-2010	07/01/2009	06/30/2010	365	260	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
	2010-2011	07/01/2010	06/30/2011	365	260	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
	2011-2012	07/01/2011	06/30/2012	366	261	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	2012-2013	07/01/2012	06/30/2013	365	212	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>

2. Click the 'Add Another Reporting Period' button until the list contains the correct number of report card periods for the District. The Progress Reporting Periods in EasyIEP™ usually align with the District's report card schedule.

Edit 2012-2013 Reporting Period Schedule (Tennessee Reference System) [New Mail!](#)

Del	Reporting Period	Reporting Period Name	Begin Date	End Date	Cal Days	Sch Days
<input type="checkbox"/>	1	Reporting Period 1	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	2	Reporting Period 2	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	3	Reporting Period 3	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	4	Reporting Period 4	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	5	Reporting Period 5	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	6	Reporting Period 6	<input type="text"/>	<input type="text"/>		

NOTE: If you delete a given reporting period, ALL higher numbered reporting periods will also be deleted.

3. Scroll down and click the 'Auto-fill Begin and End Dates' button or define periods by entering specific 'Begin and End Dates'. Clicking the Update the Database button saves the report periods and updates the 'Cal Days' and 'Sch Days' fields.

Edit 2012-2013 Reporting Period Auto Fill Options (Tennessee Reference System) [New Mail!](#)

Number of Reporting Periods:	<input type="text" value="6"/>
Begin Date of Period 1:	<input type="text" value="08/01/2012"/>
Number of Days per Period:	<input type="text" value="30"/>
Use School (working) Days:	<input checked="" type="checkbox"/>

Edit 2012-2013 Reporting Period Schedule (Tennessee Reference System) [New Mail!](#)

Del	Reporting Period	Reporting Period Name	Begin Date	End Date	Cal Days	Sch Days
<input type="checkbox"/>	1	Reporting Period 1	08/01/2012	09/12/2012	43	30
<input type="checkbox"/>	2	Reporting Period 2	09/13/2012	10/31/2012	49	30
<input type="checkbox"/>	3	Reporting Period 3	11/01/2012	12/14/2012	44	30
<input type="checkbox"/>	4	Reporting Period 4	12/17/2012	02/06/2013	52	30
<input type="checkbox"/>	5	Reporting Period 5	02/07/2013	03/21/2013	43	30
<input type="checkbox"/>	6	Reporting Period 6	03/22/2013	05/10/2013	50	30

Custom Calendars

If your District has any Schools with a different School Day Calendar than the rest of the District, create a Custom Calendar for that School.

Go to the Schools tab and click on the Calendar icon beside the School. Follow the same steps to add the Calendar days and ADM Reporting Periods and Progress Reporting Periods.

School System Tab

System Info

The School System information is entered by the EasyIEP™ Help Desk. Please contact the Message Board and request the changes for School System Information.

1. Click on the School System Tab.



2. The System Info tab appears.



3. Any edits to the School Info tab may be requested via the Message Board. The EasyIEP™ Help Desk enters new School Information.

 **Edit School System Information**

School System Name:

School Year:

School System Code:

Address:

City, State, ZipCode:

E-Mail Address:

Phone Number:

Fax Number:

EasyFax Phone Number:

Inactive

Summary

The Summary page gives an overview of the District's information in EasyIEP™.

1. Click on the Summary tab.

Log Out	Main Menu	Students	My Docs	My Reports	Wizards	Schools	School System	Users	Super User	
Log Out	School System Main Menu	System Info Summary	Reports Lists	Inactive Students Assign Teachers	User Types Inactive Users	External Systems User Type Assign	Custom Login Agreements Messages	Import Summary Data	Import Summary Data	Import History

2. Click on the individual blue links to view the summary information.

IEP Summary

Number of Schools:	3
Number of Users:	92
Number of Teachers:	62
Number of Students:	150

[Students by School](#)
[Students by Teacher](#)
[Students by Grade Level](#)
[Teachers by School](#)
[Students by Disability](#)

Reports

From the Reports tab; Federal, State and Local reports are available.

1. Click on the School System tab.



2. Click on the Reports tab.



3. Click the appropriate Report needed. Please review the Reports tab for a full listing of all reports available.



Note: When a User clicks on the blue question mark (?) located to the right of each report name, a help document with a brief description of what the report includes, when the report should be run, its available format, a snapshot of the Ad Hoc page and additional notes are provided.

- Fill in the appropriate information when applicable.

Reports - Primary/Secondary Options Report [New Mail!](#)

Select Students to Include:

Return Valid Primary Options
 Return Blank Primary Options
 Return Both Valid Primary Options and Blank Primary Options

Options Report Date:

School:

Grade: (if none are checked, you get all grades)

<input type="checkbox"/> P3 - (Pre-School)	<input type="checkbox"/> 4th Grade	<input type="checkbox"/> 10th Grade	<input type="checkbox"/> Fourth Grade - Transitional
<input type="checkbox"/> P4 - (Pre-School)	<input type="checkbox"/> 5th Grade	<input type="checkbox"/> 11th Grade	<input type="checkbox"/> Fifth Grade - Transitional
<input type="checkbox"/> Kindergarten	<input type="checkbox"/> 6th Grade	<input type="checkbox"/> 12th Grade	<input type="checkbox"/> Sixth Grade - Transitional
<input type="checkbox"/> 1st Grade	<input type="checkbox"/> 7th Grade	<input type="checkbox"/> First Grade - Transitional	<input type="checkbox"/> Seventh Grade - Transitional
<input type="checkbox"/> 2nd Grade	<input type="checkbox"/> 8th Grade	<input type="checkbox"/> Second Grade - Transitional	<input type="checkbox"/> Eighth Grade - Transitional
<input type="checkbox"/> 3rd Grade	<input type="checkbox"/> 9th Grade	<input type="checkbox"/> Third Grade - Transitional	

- Click 'Generate Report' after all the appropriate information is entered.

Select Grouping/Sort Order:

Group By: Page Break Between Groups

Sort By: Include Group Subtotal Counts

Include Total Count

Generate Report

- View the report by clicking on the Reports tab again and scrolling to the ‘Saved System Reports’ section. Click on the report name which opens the report. Any report that exceeds 2 megabytes is converted into a compressed file.

Del	Date Generated	Created By	Report Type	Expiration Date
<input type="checkbox"/>	04/02/2008	Alicia Smith	ADM by Option Report	04/07/2008
<input type="checkbox"/>	04/02/2008	Peter Smith	Primary/Secondary Options Report	04/07/2008
<input type="checkbox"/>	04/02/2008	Beth Carter	IEP History Report	04/07/2008

Reports that Administrators should run on a regular basis for monitoring the special education data include:

▪ Accommodations Report	▪ ADM by Options Report
▪ All Student Export Report	▪ Compliance Summary Report
▪ Duplicate Student Report	▪ Inappropriately Served Report
▪ Primary and Secondary Options Report	▪ Participations Report
▪ Progress Report Status Report	▪ Status of Services Report
▪ Table 1 (December 1 Report)	▪ Table 2 (Personnel Report)
▪ Table 3 (December 1 Report)	▪ Table 4 (Exited Student Report)
▪ User Access Agreement Report	▪

Updates for Selected Reports

Flexible listing Report is now available in TXT format for importing into Excel.

Primary/Secondary Options Report now summarizes the option data and provides a count by options.

Census Information Report pulls the Student’s census data from the ‘Census Information Section’ on the Eligibility tab. This report can be run multiple times throughout the school year to verify the Student’s census information section and status of service is correct.

Keep and Rename Reports

This feature allows specific Users the permission to mark reports for permanent retention and assigning custom names to individual reports.

1. Access the Reports page via School System and Reports tab.
2. User types who have permission to keep and rename reports view two additional columns, 'Keep' and 'Custom Name', under the 'Saved System Reports' section of the Reports page.
3. To permanently retain one or more reports in the system, check the 'Keep' checkbox next to the desired report(s).
4. A custom name or short description for each report is also an option. The name uses a maximum of 128 characters.

Saved System Reports						
Del	Date Generated	Created By	Report Type	Expiration Date	Keep	Custom Name
<input type="checkbox"/>	05/13/2009	Cameron Bell	TN-EIS-090-Extract	05/18/2009	<input type="checkbox"/>	
<input type="checkbox"/>	05/13/2009	Cameron Bell	Combined Table 1 & 3 Dec1 Report (PDF)	05/18/2009	<input checked="" type="checkbox"/>	Report of Children with

Notes:

- After the 'Keep' option is selected for a report, the report's Expiration Date column is changed to empty.
- A report with the 'Keep' checkbox selected remains on the Saved Reports list indefinitely.
- If a custom name is added to a report but the current User does not have 'Keep Reports' permission, the custom name appears as view-only.
- Users with appropriate permission can enter a custom name for a report even if they do not mark it 'Keep'.
- When a User unselects the 'Keep' checkbox for a 'kept' report, the report's expiration date is automatically reset to five days later. Once five days have passed, the report is deleted, unless the 'Keep' checkbox is selected again within that time.

Lists

The Lists page controls the drop down menus found in EasyIEP™ and is managed by PCG.

1. Click on the School System tab.

Log Out	Main Menu	Students	My Docs	My Reports	Wizards	Schools	School System	Users	My Info	
Students	Personal	Eligibility Process	IEP Process	Early Childhood	Documents	Restraints/Isolations	View Restraint Incidents			

2. Click on the Lists tab.

Log Out	Main Menu	Students	My Docs	My Reports	Wizards	Schools	School System	Users	Super User	
Log Out	School System	System Info	Reports	Inactive Students	User Types	External Systems	Custom Login Agreements	Import Summary Data		
Log Out	Main Menu	Summary	Lists	Assign Teachers	Inactive Users	User Type Assign	Messages	Import History		

Assign Teachers

The Assign Teachers page allows Users to assign a Case Manager to Students on individual student records, saving time from going to each Student’s Team page. It is recommended to wait until all students have a current school and grade level event prior to assigning a Case Manager.

1. Click on the School System tab.



2. Click on the Assign Teachers tab.



3. Select the grade level and School and then click View Students at the bottom of the page.
4. Select the Case Manager for each student and click Update the Database.

Assign Case Manager to Students [New Mail!](#)

Note: Students with no School assigned will not appear in this list. You will have to assign a School to them first.

Student	School	Grade	Case Manager
ActiveStudent2 Test	abc		Sheryn Test ▼
Hot Rod Taylor Test	abc	08	Blake Shearer ▼
Rachel Test	abc	09	Alex Peek ▼

[Update the Database](#)

Inactive Students

The Inactive Students tab allows Users to search for inactive Students and review the Student’s history in EasyIEP™.

1. From the School System tab, click on the Inactive Students tab and search for a Student record.



2. Enter a Student’s last name and first name and click ‘View Inactive Students’.

Criteria for Selecting Inactive Students to View [New Mail!](#)

Last School Attended:	All Schools	
Student Last Name:	TEST	<input type="checkbox"/> Exact Match
Student First Name:	s	<input type="checkbox"/> Exact Match
Student Middle Name:		<input type="checkbox"/> Exact Match
Student ID:		<input type="checkbox"/> Exact Match
State ID Number:		<input type="checkbox"/> Exact Match
Students Exited After:		
Students Exited Before:		
Exit Reason:	-Any-	
Sort List By:	Student's Last Name	

View Inactive Students

3. A list of Students meeting the search criteria displays.

Manage Inactive Students [New Mail!](#)

Student ID	State ID Number	Name	Date of Birth	School	Date Exited	Reason for Exiting
10602	USI10602	Sheryn Test	05/01/2011		05/06/2014	Moved, Known to be Continuing
102		Steve Test	01/01/2000		03/09/2015	Moved, Known to be Continuing
1050105	USI1050105	Student1 Option Test	05/01/2005		07/30/2014	Moved, Known to be Continuing
TEST0976		Superstar Queen Test	01/01/2001	TEST	01/07/2015	Moved, Known to be Continuing

- Click on the Student's name and click on the 'Student History' tab to view the Student's history.

Log Out Main Menu Students My Docs My Reports Wizards Schools School System Users Super User									
Log Out Main Menu Inactive Students Exit Info Student History Post School Info									
Student History									
Sheryn Test (●) (New Mail)									
Status	Child Study Date	Referral Date	Consent Date	Proj Consent Date	Elig Date	Proj Elig Date	IEP Date	Proj IEP Date	
Eligible	04/01/2014	04/07/2014			04/08/2014	04/08/2017		05/08/2014	
Del	Event ID	Event Date*	Event Type	Begin Date	End Date	User	Document	Date Created	
<input type="checkbox"/>	64454	03/27/2014	School Change (Sample School)	03/27/2014	05/06/2014	Sheryn Ordway		03/27/2014 10:39 (347 d	
<input type="checkbox"/>	64455	03/27/2014	Grade Change (P3 - (Pre-School))	03/27/2014	05/06/2014	Sheryn Ordway		03/27/2014 10:39 (347 d	
<input type="checkbox"/>	64498	04/01/2014	Referral			Sheryn Ordway		05/06/2014 10:47 (307 d	
<input type="checkbox"/>	64499	04/07/2014	Initial Consent for Eligibility Evaluation Received			Sheryn Ordway		05/06/2014 10:47 (307 d	
<input checked="" type="checkbox"/>	64500	04/08/2014	Eligibility Determination	04/08/2014	04/08/2017	Sheryn Ordway	Eligibility Report- Eligible (347 d	05/06/2014 10:50 (307 d	

- Click on the 'Details' button for additional information about each event.

Student Reactivations

The Inactive Students tab allows the reactivation of inactive Student records. Do not reactivate Student records unless they are returning to the same school District.

When a Student exits and re-enters a school system, the inactive record may be reactivated and a new IEP created. A new IEP must be finalized for the Student’s record to remain compliant in the current school system. The new finalized IEP begin date must be on or after the reactivation date and is usually the same as the IEP services begin date. A new IEP normally covers a full year, yet the new IEP can cover the remaining months of the school year.

1. Click on the School System tab and click on Inactive Students.



2. Enter the Student’s information and click ‘View Inactive Students’.

Criteria for Selecting Inactive Students to View [New Mail!](#)

Last School Attended:	All Schools ▼	
Student Last Name:	TEST	<input type="checkbox"/> Exact Match
Student First Name:	s	<input type="checkbox"/> Exact Match
Student Middle Name:		<input type="checkbox"/> Exact Match
Student ID:		<input type="checkbox"/> Exact Match
State ID Number:		<input type="checkbox"/> Exact Match
Students Exited After:	<input type="text"/>	
Students Exited Before:	<input type="text"/>	
Exit Reason:	-Any- ▼	
Sort List By:	Student's Last Name ▼	

View Inactive Students

3. Click on the Student’s name.

Manage Inactive Students New Mail!						
Student ID	State ID Number	Name	Date of Birth	School	Date Exited	Reason for Exiting
10602	USI10602	Sheryn Test	05/01/2011		05/06/2014	Moved, Known to be Continuing
102		Steve Test	01/01/2000		03/09/2015	Moved, Known to be Continuing
1050105	USI1050105	Student1 Option Test	05/01/2005		07/30/2014	Moved, Known to be Continuing
TEST0976		Superstar Queen Test	01/01/2001	TEST	01/07/2015	Moved, Known to be Continuing

4. Enter a Re-activation Date and click ‘Re-Activate this Student in the Database’.

Exiting Student Information **Sheryn Test**
[New Mail!](#)

Date Exited:

Reason for Exiting:

[Update the Database](#)

Re-Activation Date:

[Re-Activate this Student in the Database](#)

5. Confirm the Reactivation.

Confirm Re-Activation **Sheryn Test**
[New Mail!](#)

Please confirm that you intend for Sheryn Test's records to be reactivated with the date listed below. This will cause the student to appear in the regular student search results and allow for work to proceed with their records again.

Re-Activation Date:

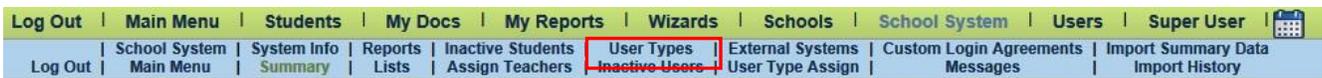
[Re-Activate this Student in the Database](#)

User Types

User Types are how EasyIEP™ determines a User’s level of permission and access to student records. Users with similar job functions ideally are grouped into a specific User type. New user types were added in 2014 and all districts use the same group of user type permissions.

To View User Types:

1. From the Main Menu, click on the School System tab and click on User Types.



2. Click on the User Type to review the permissions.

Select a User Type to Edit [New Mail!](#)

[Add new user type](#)

ID	User Type	Code	# Users	Assoc with All Schools	Assoc with All Grades	Can Be Case Manager	Can Be IEP Team Member
1	superuser	<input type="text"/>	43	Yes	Yes	Yes	Yes
185	EdPlan/EasyIEP Administrator 2014	<input type="text"/>	7	Yes	Yes	Yes	Yes
186	Psychologist 2014	<input type="text"/>	48	No	Yes	Yes	Yes
187	Certifying Specialist 2014	<input type="text"/>	1	No	Yes	Yes	Yes
188	Related Service Provider 2014	<input type="text"/>	2	No	Yes	No	Yes
189	District-wide Consultant 2014	<input type="text"/>	1	No	Yes	No	Yes
190	School/District Lead 2014	<input type="text"/>	3	No	Yes	Yes	Yes
191	Special Educator 2014	<input type="text"/>	3	No	Yes	Yes	Yes
192	School Staff 2014	<input type="text"/>	2	No	Yes	No	Yes

- This screen displays a quick snapshot of the permission level of this User Type. To view the specific permissions, click on the 'View Permissions' button.

View User Type EdPlan/EasyIEP Administrator 2014 [New Mail!](#)

Name:	EdPlan/EasyIEP Administrator 2014
Assoc with All Schools:	yes
Assoc with All Grades:	yes
Can Be Case Manager:	Yes
Can Be Team Member:	Yes
Grades:	All

[View Permissions](#)
[View Document Permissions](#)
[View Report Permissions](#)
[View Event Permissions](#)

[View Student Page Access](#)
[View Inactive Student Page Access](#)

[View Group Page Access](#)
[View Parent Page Access](#)
[View Flexible Interface Access](#)

[Add Compliance E-mail Alert](#)

[Add Progress Report E-mail Alert](#)

[Add Static E-mail Alert](#)

[Update the Database](#)

User Type Assign

The User Type Assign tab shows the hierarchy of the different User types in EasyIEP™. This is a view only page for district staff.

External Systems

External systems are school systems in a Tennessee District that provide services to a Student.

To View the External Systems tab:

1. Click on the External Systems tab.

Log Out	Main Menu	Students	My Docs	My Reports	Wizards	Schools	School System	Users	Super User	
Log Out	School System	System Info	Reports	Inactive Students	User Types	External Systems	Custom Login Agreements	Import Summary Data		
	Main Menu	Summary	Lists	Assign Teachers	Inactive Users	User Type Assign	Messages	Import History		

2. This screen displays a sample list of the external school systems currently setup in the District site. This is a complete list of all systems in Tennessee. If an external system is missing from the site, please submit a request to the Message Board to have the system added. More information can be viewed by clicking on the name of the external school system.

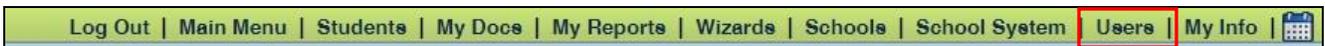
Manage External School Systems							tnref
Inactivate	ID	Name	Code	Address	Phone	Email	New Mail!
<input type="checkbox"/>	65	Alamo City Schools	171				
<input type="checkbox"/>	66	Alcoa City Schools	051				
<input type="checkbox"/>	67	Anderson County Schools	010				
<input type="checkbox"/>	68	Athens City Schools	541				
<input type="checkbox"/>	69	Bedford County Schools	020				
<input type="checkbox"/>	70	Bells City Schools	172				
<input type="checkbox"/>	25	Benton County Schools	030				
<input type="checkbox"/>	71	Bledsoe County Schools	040				
<input type="checkbox"/>	72	Blount County Schools	050				
<input type="checkbox"/>	73	Bradford SSD	274				
<input type="checkbox"/>	74	Bradley County Schools	060				
<input type="checkbox"/>	75	Bristol City Schools	821				
<input type="checkbox"/>	76	Campbell County Schools	070				

Users Tab

The Users tab allows the ability to edit an existing User’s information, change a User’s password, and also add a new User.

Search for an Existing User

1. From the Main Menu, click on the Users tab.



2. Enter the search criteria. The search can be limited by School or User type (these are not required) or User’s last name. Click ‘View User(s)’ to view the search selections.

Criteria for Selecting Users to View [New Mail!](#)

School:	All Schools ▼		
User Type(s): (check none to match all)	<input type="checkbox"/> EdPlan/EasyIEP Administrator 2014	<input type="checkbox"/> School Administrator 2014	
	<input type="checkbox"/> Psychologist 2014	<input type="checkbox"/> Outside Provider/Contracted Providers 2014	
	<input type="checkbox"/> Certifying Specialist 2014	<input type="checkbox"/> Restraint/Isolation Facilitator 2014	
	<input type="checkbox"/> Related Service Provider 2014	<input type="checkbox"/> State Monitor 2014	
	<input type="checkbox"/> District-wide Consultant 2014	<input type="checkbox"/> IT User 2014	
	<input type="checkbox"/> School/District Lead 2014	<input type="checkbox"/> IEP Team Member No Login 2014	
	<input type="checkbox"/> Special Educator 2014	<input type="checkbox"/> Restraint/Isolation Participant 2014	
	<input type="checkbox"/> School Staff 2014	<input type="checkbox"/> No Login 2014	
	User Last Name:	<input type="text"/>	<input type="checkbox"/> Exact Match
	User First Name:	<input type="text"/>	<input type="checkbox"/> Exact Match
Title:	<input type="text"/>	<input type="checkbox"/> Exact Match	
User ID:	<input type="text"/>	<input type="checkbox"/> Exact Match	
Sort List By:	User's Last Name ▼		

[View User\(s\)](#)

3. To view the User’s information, click on the User’s name.

Select a User New Mail!							
Del	CP	Name	School(s)	Students	Title	User Type	E-mail Address
<input type="checkbox"/>	●	Blake Shearer	-All-	2, 0	H.S. Intervention/Transition Co.	EdPlan/EasyIEP Administrator 2014	Blake.shearer@tn.gov
<input type="checkbox"/>		Jennifer Stem	-All-	0, 0		EdPlan/EasyIEP Administrator 2014	
<input type="checkbox"/>	<input type="radio"/>	Admin Test	-All-	0, 1		EdPlan/EasyIEP Administrator 2014	
<input type="checkbox"/>		EdPlan Admin Test	-All-	0, 0		EdPlan/EasyIEP Administrator 2014	
<input type="checkbox"/>		Samantah D. Test	-All-	0, 0		EdPlan/EasyIEP Administrator 2014	
<input type="checkbox"/>		samantha Test	-All-	0, 0		EdPlan/EasyIEP Administrator 2014	sdlaw@pogus.com
<input type="checkbox"/>	●	Sheryn Test	-All-	1, 8	A	EdPlan/EasyIEP Administrator 2014	sheryn.ordway@tn.gov

4. The ‘Edit User Information’ screen allows modifications to the User’s information as well as the ability to change the User’s password. For more information on changing the User’s password, please see the ‘Changing a User’s Password’ section. Please make sure you ‘Update the database’ when you are finished changing the User’s information.

Note: The ‘Add to TNIEP Distribution List’ checkbox at the top of the screen is an option that includes the User on an e-mail distribution list. (This option is not used at this time). Please notify the EasyIEP™ Message Board or call the Help Desk, if a new person needs added to the email distribution list.

Edit User Information **Blake Shearer**
[New Mail!](#)

Indicate Contract Employee

Name:	First	Middle	Last	Suffix	
	<input type="text" value="Blake"/>	<input type="text"/>	<input type="text" value="Shearer"/>	<input type="text"/>	
User Code:	<input type="text" value="Shearer001"/>				
Date of Birth:	<input type="text"/>		Gender:	<input type="text"/>	
Password:	<input type="text"/> (See How to choose a good password)				
Password (again):	<input type="text"/>				
Title:	<input type="text" value="H.S. Intervention/Transition Co."/>				
Address:	<input type="text" value="Andrew Johnson Bldg."/>				
City, State, ZipCode:	<input type="text" value="Nashville"/>	<input type="text" value="TN"/>	<input type="text"/>		
Home Phone:	<input type="text"/>				

Add a New User

The EasyIEP™ Administrator 2014 user type has access to add a new user.

1. From the Main Menu, click on the Users tab.



2. Click the 'Add New User' button.

Criteria for Selecting Users to View [New Mail!](#)

School:	All Schools ▼
User Type(s): (check none to match all)	<input type="checkbox"/> EdPlan/EasyIEP Administrator 2014 <input type="checkbox"/> School Administrator 2014 <input type="checkbox"/> Psychologist 2014 <input type="checkbox"/> Outside Provider/Contracted Providers 2014 <input type="checkbox"/> Certifying Specialist 2014 <input type="checkbox"/> Restraint/Isolation Facilitator 2014 <input type="checkbox"/> Related Service Provider 2014 <input type="checkbox"/> State Monitor 2014 <input type="checkbox"/> District-wide Consultant 2014 <input type="checkbox"/> IT User 2014 <input type="checkbox"/> School/District Lead 2014 <input type="checkbox"/> IEP Team Member No Login 2014 <input type="checkbox"/> Special Educator 2014 <input type="checkbox"/> Restraint/Isolation Participant 2014 <input type="checkbox"/> School Staff 2014 <input type="checkbox"/> No Login 2014
User Last Name:	<input type="text"/> <input type="checkbox"/> Exact Match
User First Name:	<input type="text"/> <input type="checkbox"/> Exact Match
Title:	<input type="text"/> <input type="checkbox"/> Exact Match
User ID:	<input type="text"/> <input type="checkbox"/> Exact Match
Sort List By:	User's Last Name ▼

[View User\(s\)](#)
[View Previous Search Results](#)
[Add New User](#)

- Enter the User’s demographic information (including a temporary password). Enter the User’s unique User Code; this code cannot be duplicated. Choose the User type for the User via the drop down menu (this is a required field). Click the checkboxes by the appropriate school(s) for the User. Click the ‘Update the database’ button or to add more than one User at a time, click the ‘Add User to Database, then add another’ button.

Add New User [New Mail!](#)

Name:	First	Middle	Last	Suffix
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
User Code:	<input type="text"/>			
Password:	<input type="text"/> (See How to choose a good password)			
Password (again):	<input type="text"/>			
Title:	<input type="text"/>			
Address:	<input type="text"/>			
City, State, Zip Code:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Phone:	<input type="text"/>			
Work Phone:	<input type="text"/>			
E-Mail Address:	<input type="text"/>			
User Type:	<input type="text"/>			
	<p>Note: Associations with Schools -- User Types can be set up with automatic School associations.</p> <p>To select the appropriate School associations for a new user:</p> <ul style="list-style-type: none"> • If you select a User Type in the dropdown list above with no symbol after it, the system will associate the user with each School you choose below. • If you select a User Type that is followed by an asterisk (*) (All Schools), the new user is automatically associated with every school. 			
School(s):	<p><input type="button" value="Check All"/> <input type="button" value="Check None"/></p> <p><input type="checkbox"/> abc test school <input type="checkbox"/> Test School</p> <p><input type="checkbox"/> Sample School</p>			

Add Personnel Information for Federal Report Table 2

On each User's page is a section for 'State and Federal Personnel Report Information Section.'

Scroll to the 'State and Federal Personnel Report Information Section' near the bottom of the User page. To include a User in the Personnel Report fill in the 'District Employment Begin Date' field. This is the first check in the report. When this field is entered, the User is counted in the federal Table 2 report (Personnel Report), providing there are no other errors associated with this User's information. If this field is not entered the User is not counted.

Although it appears there are more fields to enter for each User, most Users only need information entered in five fields. Those fields are: District Employment Begin Date, License Type, Waiver, an employment type and an FTE.

Step 1 – Complete Section 1

State and Federal Personnel Report Information Section

Section 1

Instructions:

(1) For the District Employment Begin Date, enter the date (month, day, and year) this special education staff person was initially employed in this school district.

(2) If the staff person leaves their position or must be made inactive for other reasons, then enter the date (month, day, and year) this special education staff person leaves their special education position in this school district in the District Employment End Date field. Then, scroll to the bottom of the screen and click on the "Delete this user from the database" button to complete the inactivation. Inactivated users can be viewed and/or re-activated from the Main Menu by clicking on the School System button, then click on the Inactive Users button to search for an inactive user.

(3) Select the appropriate License Type for this staff person. If no license is required for their position, select N/A under License Type.

(4) If this staff person has a waiver to be employed in their current position, select the Yes button beside Waiver. Otherwise, select No.

District Employment Begin Date: 

District Employment End Date: 

License Type:

Waiver:

Yes No

District Employment Begin Date: 

District Employment End Date: 

License Type:

Waiver:

Yes No

Section 1

District Employment Begin Date - this field is entered for all Users providing special education services and counted in the federal personnel report. Since not all Users provide services to Students, anyone without this information is not counted in the report.

District Employment End Date - this field is entered for all Users providing special education services and counted in the federal personnel report and are no longer an active EasyIEP™ User in your District. If this User is active on December 1, they are included in the federal personnel report.

License Type - this field is entered for all Users providing special education services to Students.

Waiver - this field is entered for all Users providing special education services to Students with a specific waiver for employment.

Step 2 – Complete Sections 1A, 1B, 1C or a combination of the subsections

Section 1A

Instructions: Please note: The drop down lists have been changed to reflect the information needed for the Table 2 Personnel Report to the US Department of Education, Office of Special Education Programs beginning in the 2006-2007 school year.
For most special education staff, select one appropriate Employment Type from 1A, 1B, or 1C. Then enter the full time equivalent (FTE) that the staff person works in that Employment Type. Enter the FTE in the ### format. For example, (1) if the staff person works full-time in that Employment Type, then enter 1.00; or (2) if the staff person works half-time in that Employment Type, then enter 0.50.
If a staff person works as both a special education teacher and as a related service provider, enter the appropriate Employment Type from the drop down lists for both 1A and 1C and enter the correct portion of their FTE spent in each Employment Type in the FTE fields below each Employment Type box.

Section 1A -- "Special Education Teacher Employment Type"
Instructions:
For staff employed as special education teachers, select the appropriate age level taught and highly qualified status. If a special education teacher's caseload is 51% or more students ages 3-5, then select ages 3-5 as the age level for their teaching position. Teachers reported as highly qualified must meet the State standard based on the definition of highly qualified in 20 U.S.C. Section 1401(10). If teachers who work with children ages 3 through 5 or others are not included in the State's definition of highly qualified, report these personnel as highly qualified if they have the appropriate license for the position they hold.

Special Education Teacher Employment Type:

Special Education Teacher FTE (format #.##)

Section 1A is for reporting the number of FTE Special Education teachers contracted or employed for work with Students receiving special education, according to whether or not the teachers are highly qualified.

Section 1B

Paraprofessional Employment Type:

Paraprofessional FTE (format #.##)

Section 1B is for reporting the number of FTE Special Education paraprofessionals contracted or employed for working with Students who are receiving special education, according to whether or not the teachers are highly qualified for the position held.

Section 1C

Related Service Provider Employment Type:

Related Service Provider FTE (format #.##)

Section 1C is for reporting the number of FTE related services personnel, by type of personnel contracted and employed providing related services for Students with disabilities ages 3-21, according to whether or not they are fully certified for the position held.

If a User has two separate Employment Types in sections 1A, 1B, or 1C, meaning they split their time between two different positions, enter multiple Employment Type and FTE fields.

Inactivate Users

Review Users in EasyIEP™ and inactivate Users that no longer provided special education services in the District.

1. Click on the Users tab on the main menu.



2. Search by User Name or user type/
3. Click on the User's Name to inactivate.
4. Enter the 'Employment End Date' (month, day, and year) the special education employee leaves their position or made inactive for other reasons in the District.

Help | Log Out | Main Menu | Students | My Docs | My Reports | Wizards | Schools | School System | **Users** | Super User | | PCG

State and Federal Personnel Report Information Section

Section 1
Instructions:
(1) For the District Employment Begin Date, enter the date (month, day, and year) this special education staff person was initially employed in this school district.
(2) If the staff person leaves their position or must be made inactive for other reasons, then enter the date (month, day, and year) this special education staff person leaves their special education position in this school district in the District Employment End Date field. Then, scroll to the bottom of the screen and click on the "Delete this user from the database" button to complete the inactivation. Inactivated users can be viewed and/or re-activated from the Main Menu by clicking on the School System button, then click on the Inactive Users button to search for an inactive user.
(3) Select the appropriate License Type for this staff person. If no license is required for their position, select N/A under License Type.
(4) If this staff person has a waiver to be employed in their current position, select the Yes button beside Waiver. Otherwise, select No.

District Employment Begin Date:

District Employment End Date:

License Type:

Waiver: Yes No

5. Scroll to the bottom of the screen and click on the 'Delete this User from the database' button to complete the inactivation. Inactivated Users are viewed and/or re-activated from the Main Menu by clicking on the School System tab and Inactive Users tab to search for an Inactive User.



6, On the next screen, confirm whether you still want to delete the user account.

Delete User(s) [New Mail!](#)

Please review the following list of users to be certain you want to inactivate these users

- 1. Jennifer Stem (1939)

6. To inactivate multiple Users NOT included in FTE and therefore do not need District Employment End Dates, repeat Steps 1 and 2. On the ‘Select a User’ page, click the ‘Delete’ checkbox next to all Users to inactivate. Scroll to the bottom and click ‘Inactivate Selected Users’. Only Users with User Type ‘Director’ have access to this functionality.

Select a User [New Mail!](#)

Del	CP	Name	School(s)	Students	Title	User Type
<input type="checkbox"/>	<input checked="" type="radio"/>	Blake Shearer	-All-	2, 0	H.S. Intervention/Transition Co.	EdPlan/EasyIEP Administrator 2014
<input checked="" type="checkbox"/>	<input type="radio"/>	Jennifer Stem	-All-	0, 0		EdPlan/EasyIEP Administrator 2014
<input checked="" type="checkbox"/>	<input type="radio"/>	Admin Test	-All-	0, 1		EdPlan/EasyIEP Administrator 2014
<input type="checkbox"/>	<input type="radio"/>	EdPlan Admin Test	-All-	0, 0		EdPlan/EasyIEP Administrator 2014
<input type="checkbox"/>	<input type="radio"/>	Samanthah D Test	-All-	0, 0		EdPlan/EasyIEP Administrator 2014
<input type="checkbox"/>	<input type="radio"/>	samantha Test	-All-	0, 0		EdPlan/EasyIEP Administrator 2014
<input type="checkbox"/>	<input checked="" type="radio"/>	Sheryn Test	-All-	1, 8	A	EdPlan/EasyIEP Administrator 2014

(7 Users)

7. Confirm the Users you want to inactivate and click ‘Yes, I’m sure’ or ‘No, I changed my mind’.

Delete User(s) [New Mail!](#)

Please review the following list of users to be certain you want to inactivate these users

- 1. Jennifer Stem (1939)
- 2. Admin Test (1857)

Changing a User's Password

If a User forgets their password, the EasyIEP™ Administrator may reset the password with a temporary password. After the User successfully logs into EasyIEP™ they must change their password to something that only they know via their My Info tab.

1. Search for the User on the Users tab as outlined in the previous section 'Search for an Existing User'.
2. Type in the new password in the Password field and then re-type the password in the Password (again) field. Click the 'Update the database' button.

Note: Please encourage all Users to setup a 'Forgot Password Question' on the MyInfo tab. Users must have a current email address listed on the MyInfo tab or personal user page. This allows the individual User to reset their password, if needed. A valid email address is required for the system to send a temporary password from the 'Forgot password' feature.

 **Edit User Information for Peter Smith**

Add to TNIEP Distribution List

Indicate Contract Employee

Name:	First	Middle	Last	Suffix
	<input type="text" value="Peter"/>	<input type="text"/>	<input type="text" value="Smith"/>	<input type="text"/>
User Code:	<input type="text" value="Test001"/>	Soc Sec Number:	<input type="text"/>	
Date of Birth:	<input type="text" value="01/01/1969"/> 	Gender:	<input type="text" value="Male"/> ▼	
Password:	<input style="border: 2px solid red;" type="text"/> (See How to choose a good password)			
Password (again):	<input style="border: 2px solid red;" type="text"/>			

Compliance Email Alerts

Compliance email alerts are added for either a specific User or a User type. These alerts warn Users of timelines approaching or missed. Compliance alerts are setup to track IEP, Eligibility and/or Reevaluation dates. Compliance alerts are the best way for Directors and other District level staff members to stay up-to-date with their District’s compliance. To add a compliance email alert, submit a request to the Message Board. Please specify which User(s) or User type(s) that need an alert and the criteria for each alert.

Add User Alert
Theresa Nicholls
[New Mail!](#)

Type:	<input type="checkbox"/> -All-	<input checked="" type="checkbox"/> IEP	<input type="checkbox"/> Rejected IFSP Eligibility (10 Days or Gre
	<input type="checkbox"/> Referral	<input type="checkbox"/> Rejected IEP (10 Days or Greater)	<input type="checkbox"/> Rejected IFSP Non-Eligibility (10 Days o
	<input checked="" type="checkbox"/> Eligibility	<input type="checkbox"/> IFSP Referral	<input type="checkbox"/> IFSP
	<input type="checkbox"/> Rejected Eligibility (10 Days or Greater)	<input type="checkbox"/> IFSP Eligibility	<input type="checkbox"/> Rejected IFSP (10 Days or Greater)
	<input type="checkbox"/> Rejected Non-Eligibility (10 Days or Greater)	(If you select '-All-', don't select individual types)	
Send an alert for:	Students that User is Case Manager for ▼		
Number of Days Overdue:	<input type="text" value="-5, 0, 1"/> (Separate multiple values with a comma. Values may be negative. Types listed with day settings will ig		
	<input checked="" type="checkbox"/> Also alert if Overdue more than any of these values		

Update the Database

My Info Tab

The My Info tab contains a Users' contact information. Confirm the email address and current phone number is correct. In order to change any information on the My Info tab, the User must first enter their current password.

Change Your Password

1. From the Main Menu, Click on the My Info tab.



2. Enter current password; this is the password that is used to log into EasyIEP™. Enter a new password in the New Password box and enter it again to verify. Click 'Update the Database'. Passwords are case sensitive. Please select the 'How to choose a good password' hyperlink for further assistance.

Update Information for Peter Smith

Please enter your current password: (required to make any changes on this page)

To change your current password, enter the new password in both of the following areas
(See [How to choose a good password](#))

New Password:

New Password (to verify):

	First	Middle	Last	Suffix
Name:	<input type="text" value="Peter"/>	<input type="text"/>	<input type="text" value="Smith"/>	<input type="text"/>
User Code:	<input type="text" value="PCG1001"/>			
Title:	<input type="text" value="Special Ed Teacher"/>			
Address:	<input type="text"/>			
City, State, ZipCode:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Home Phone:	<input type="text"/>			
Work Phone:	<input type="text" value="615-647-9989"/>			
E-Mail Address:	<input type="text" value="tmschools@pcgus.com"/>			

After updating the database, a confirmation box opens. A User successfully changes their password by selecting 'OK' in the confirmation box. The password disappears for security purposes. To test the new password, log out of EasyIEP™ and log in again using the new password. District system Administrators can change a User's password, if necessary.

Change Personal Information

1. From the Main Menu, Click on the My Info tab.

Log Out | Main Menu | Students | My Docs | My Reports | Wizards | Schools | School System | Users | **My Info** 

2. Enter current password. Personal information is added and/or edited on this page. At a minimum, a User should enter their 'Title', 'Work Phone' and 'E-mail Address'.
3. Click 'Update the database'.

 **Update Information for Peter Smith**

Please enter your current password: (required to make any changes on this page)

To change your current password, enter the new password in both of the following areas (See [How to choose a good password](#))

New Password:

New Password (to verify):

Name:	First	Middle	Last	Suffix
	<input type="text" value="Peter"/>	<input type="text"/>	<input type="text" value="Smith"/>	<input type="text"/>
User Code:	<input type="text" value="PCG1001"/>			
Title:	<input type="text" value="Special Ed Teacher"/>			
Address:	<input type="text"/>			
City, State, ZipCode:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Phone:	<input type="text"/>			
Work Phone:	<input type="text" value="615-647-9989"/>			
E-Mail Address:	<input type="text" value="tnschools@pcgus.com"/>			

4. For security purposes, after clicking 'Update the database' the User's password disappears. The password does not need reentering. Simply return to the Main Menu.

Logging out and Exiting EasyIEP™

To log out of EasyIEP™, select the Log Out tab on the main menu bar. For security reasons, please log out of EasyIEP™ when finished or leaving for the day. If leaving a computer for a short break lock the screen by pressing CTRL, ALT and Del keys simultaneously.

To Log out and Exit EasyIEP™

1. Click the Log Out tab on the menu bar.



2. Close the browser by using one of these methods:
 - Click on File in the upper left hand corner of the screen and then choose Exit.
 - Mac Users - Click the  in the upper left hand corner of the screen.
 - PC Users – Click the 'X' in the upper right hand corner of the screen.

**** Always Log Out and Exit the Browser ****

When a User does not Log Out and close the browser, anyone can access information in EasyIEP™ or record information under that User's login name. The User is responsible for any actions in EasyIEP™ performed under their login name.

Reminders

- EasyIEP™ Help Desk: 1-888-212-3162.
- Use the Message Board for EasyIEP™ Help Desk questions, report bugs or post suggestions. This is found on the Main Menu page of EasyIEP™.
- All Message Board requests must include a Student's full name and date of birth for further research by the EasyIEP™ Help Desk. If the requests are in reference to Users or User Types, please include specific examples.
- To request an IEP transfer, post a message and include the following information:
Student's full name, date of birth, sending District, and receiving District
- Use the Navigational Toolbar to navigate through the screens.
- Always 'Update the database' to save data entered.
- When typing long quantities of notes (e.g., Narratives tab) 'Update the Database' frequently.
- A finalized IEP document is required to create an option of service.
- A finalized IEP document is required to create an IEP-At-a-Glance document.
- A finalized IEP document is required to create a Progress Report.
- Do not use the 'Back' button on the browser tool bar.
- Contact the District EasyIEP™ Administrator for password resets.

Top Ten Things Administrators Need to Know about EasyIEP™

The following is a list developed by some District leaders to assist EasyIEP™ Administrators with monitoring the special education data for their District. We highly recommend Special Ed Directors and EasyIEP™ Administrators review on a regular basis the items on this list for monitoring the Student data and reports for the District.

1. How To Find A Student

- Search by a Student's last name or partial last name
- Don't enter too much information that may exclude the Student from your search
- If looking for a set of Students with certain criteria, use the 'Advanced Student Search', which allows for searches by compliance, disabilities, services, etc.

2. Compliance Symbols Meanings

- Student Specific (green checkmarks, yellow triangles, red stop signs)
 - Click symbol to view compliance with each Student
- School and User Specific (white, green and red pie charts)
 - Click symbol to view compliance by school or User

3. Reports - Run the following reports frequently to identify and resolve data issues

For a description of any report, click on the blue question mark symbol to the right of the report name

- Accommodations Report
- ADM by Options Report
- All Student Export Report
- Compliance Summary Report
- Duplicate Student Report
- Inappropriately Served Report
- Primary and Secondary Options Report
- Participations Report
- Progress Report Status Report
- Status of Services Report
- Table 1 (December 1 Report)
- Table 2 (Personnel Report)
- Table 3 (December 1 Report)
- Table 4 (Exited Student Report)
- User Access Agreement Report

4. Documents Available in EasyIEP™ beyond the IEP

- Eligibility Documents (these documents create events on the Student's history page vs. entering information on the 'Eligibility' tab)
- IEP-At-A-Glance – typically a one page document given to Regular Ed teachers
- Prior Written Notice
- Invitation to Meeting
- Re-evaluation Forms

5. Determine User Permissions

- Some Districts restrict Users' access to the 'Personal' and 'Eligibility' tabs which reduces errors in EasyIEP™ as well as EIS.
- Some Districts also limit certain User types access to finalize specific documents and to run reports

6. Provide Additional Training Opportunities for New Users and Refresher Trainings to All Users in Your District

- Provide District training opportunities (Summer in-service)
- Provide training opportunities after new releases in EasyIEP™

7. Develop a District Hierarchy of Support

- District requirements
- Central contact for District Users
- Message Board requests

8. Main Menu Management – Communication to District Users

- Website for HTML etiquette: <http://www.w3.org/TR/html4/types.html>
- Dissemination of information to EasyIEP™ Users
- Upload District-specific documents

9. Viewing Students History Page

- Compliance Symbols
- Events in Student's history
- Electronic Filing Cabinet
- Documents available (including documents from other Districts for transfer Students)

10. Setting Up and Maintaining District and Custom School Calendars

- ADM Reporting Periods
- Progress Reporting Periods
- Holidays, Weather Days, Breaks

State and Federal Reporting

December 1 Reports

The 'December 1 Report Packet' includes the federal Combined Table 1 & 3 Report and the state October Court Report. All school Districts must print one copy of the reports from EasyIEP™ to verify, sign, and mail to the Tennessee Department of Education office. The December 1 report packet must be postmarked by December 22. Do not alter counts on the reports generated in EasyIEP™ by writing on the printed report. These reports are derived from the individual Student data in EasyIEP™. Run DRAFT reports periodically throughout the school year to verify accuracy of the Student data. If the DRAFT reports are not accurate, changes to the reports are made by correcting individual Student data entered in EasyIEP™ by your District personnel.

The December 1 Report Packet includes the following reports:

- Federal Reports:
 - Final Combined Table 1&3 December 1 Report
- State Reports:
 - Status of Service Court Report
 - Inappropriately Served Court Report
 - Students Suspected of Being Disabled
 - TN Cover Page
 - Restraint and Isolation District Summary

Details reports for verifying the individual Student records included in each report are available anytime throughout the school year. The following reports are recommended for troubleshooting the reports required for the December 1 Report Packet:

- Combined Table 1&3 Dec 1 Report – Details
- Status of Service Court Report (XLS)
- Students Suspected of Being Disabled (XLS)
- Inappropriately Served Court Report (TXT)
- Restraint and Isolation Report (XLS)

The EasyIEP™ Help Desk provides assistance for running and troubleshooting any of the reports for the 'December 1 Report Packet'.

End of Year Reports

The End of Year Report and the February Court Report are submitted at the end of each school year (June 30) to the Tennessee Department of Education office and includes the following reports:

- Federal Reports:
 - Table 2 – Personnel Report
 - Table 4 – Exited Student Report
 - End of Year Referral Data Report
 - Restraint and Isolation District Summary
- State Reports:
 - TN-End of Year Frequency Report
 - Status of Service Court Report
 - Inappropriately Served Court Report
 - Students Suspected of Being Disabled
 - TN Cover Page

Details reports for verifying the individual Student records included in each report are available anytime throughout the school year. The following reports are recommended for troubleshooting the reports required for the End of Year Report and the February Court Report:

- Status of Service Court Report (XLS)
- Students Suspected of Being Disabled (XLS)
- Inappropriately Served Court Report (TXT)
- Personnel Report Table 2 (TXT) Details
- Exited Student Report with Details (TXT)
- TN-End of Year Frequency Report (TXT) Details

The EasyIEP™ Help Desk provides assistance for running and troubleshooting any of the End of Year Reports and February Court Report.

Year End / Startup Procedures

In order for the Year-End Closeout and New-Year Startup to occur in an orderly and timely fashion, PCG and TDOE have a set of instructions to follow. These steps are listed in the order they should be completed and some steps must be completed before continuing to other steps. The following checklist is a guide to help you identify which tasks are important for your District. Every step may or may not be completed by every District.

Year-End Procedures

This group of instructions assists the District with identifying important tasks completed near the end of the school year.

These tasks greatly impact the group of Federal and State 'End of Year' Reports. Review all Year-End Procedures before creating the Federal and State 'End of Year' Reports.

Review Contractual Students

****When: Year-End****

Review the Contractual Student's data which is located on the Eligibility tab in EasyIEP™. Run the All Student Export Sped Only (Excel) report and sort on the column labeled as 'CenContract' to find 'In State' or 'Out of State' contractual Students. If Students are marked as Contractual in error, make the necessary corrections on the Eligibility tab and finalize a new IEP document. Be sure to delete the incorrect IEP document.

Districts can run the 'Census Information Report' found on the Reports tab. This report shows the Students current 'Status of Service' and 'Contractual Service' listed on the Eligibility tab.

Inactivate Graduated Students

When: Year-End

Inactivate graduated seniors using an Exit Date within the calendar school year.

1. Click on the Students tab on the main menu bar. Search for the Student by 'Name', 'Student ID', 'School' or 'Grade Level'. Narrow the search by using the box labeled 'Special Ed' limiting the search to active special education Students. Click on the 'Grade Level' field limiting the search to 12th grade Students.

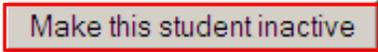
2. Click on the 'Name' of the Student to inactivate.

Select a Student

CP	Proj Elig	IEP End	School	Grade	Name	Student ID	Age	Date Of Birth	Dis	Case Manager
●	04/29/2010	04/30/2008	0020	02	Norton Test	11111115	9 Years	05/02/2000	SLD	Woodrow Farley
●	04/02/2010	04/02/2008	0020	05	Ralph Test	11111116	12 Years	05/05/1997	AUT	Woodrow Farley
●	04/26/2010	05/03/2008	0021	10	Sandy A Test	789123456	18 Years	06/24/1991	DB,SI	James Aldinger
●	01/11/2010	05/03/2008	0020	03	Shirley B Test	740234	11 Years	03/24/1998	VI	James Aldinger
✓					Susie Student Test	TEST111	9 Years	10/02/1999		
●	11/28/2009	05/03/2008	0020	12	Tony Test	111111183	20 Years	03/02/1989	SLD,SI	James Aldinger
●	04/26/2010	05/03/2008	0021	P4	Tony C Test	49302847	6 Years	10/01/2002	DD	Theiry Henry

(7 Students)

- 3. On the Student’s personal page, scroll to the bottom and click the button labeled ‘Make This Student Inactive’.



- 4. Enter the ‘Date Exited’ and the ‘Reason for Exiting’ from the drop down list and click ‘Update the Database’. The Date Exited is the last day of school or sometime within the school year calendar. Please do not use an Exit Date after the last day of school, since this creates an error in EIS.

 **Exit Questionnaire for Tony Test**

Date Exited: 

Reason for Exiting:

Anticipated Services Required:

- Graduated with Regular Diploma
- Graduated with Regular Diploma by fulfilling IEP requirements
- Graduated with Special Ed. Diploma
- Graduated with High School Certificate
- Graduated with GED + 2
- Reached Maximum Age
- Dropped Out
- Deceased
- Normal Matriculation - progression to next grade
- Moved, Known to be Continuing
- Transferred to Regular Education
- Compliance Violation
- Parent Withdrawal/Refused Services (All Ages)

Copyright © 1999-2009
peruser), Server go1.easyiep.com, System CSS, Page E

Inactivate Other Students

****When: Year-End and Start-Up****

It is important to inactivate all Students in EasyIEP™ before running your Federal Table 4 Exit Report (as part of the End-of-Year reports).

Inactivate any Students no longer receiving special education services in your District. Whether this includes Students who have moved to another District/state or Students exiting out of special education, make sure the Students are inactivated with the correct exit date and exit reasons

If the Student is leaving the District, make sure the Student is inactivated in the Student Information System (SIS). The exit date in EasyIEP™ must match the exit date in the District's SIS ensuring there are no discrepancies in EIS.

1. Click on the Students tab on the main menu bar and search for the Student.

Search for the Student by 'Name', 'Student ID', 'School' or 'Grade level'. Search by using the box labeled 'Special Ed' limiting the search to active special education Students.

Log Out | Main Menu | **Students** | My Docs | Wizards | Schools | School System | Users | Super User |

Criteria for Selecting Students to View New Mail!

Grade Level: 12th Grade

School: All Schools

Student Last Name: Exact Match

Student First Name: Exact Match

Student Middle Name: Exact Match

Student ID: Exact Match

State ID Number: Exact Match

Status:

- General Ed
- Special Ed
- TEIS Referral
- IEP
- IFSP Eligibility
- Discontinued
- IFSP
- Considered for Behavior Interventions
- Referral
- Tier 1 Behavior
- Initial Consent for Eligibility Evaluation Received
- Identified as Requiring Tier 2 Behavior Interventions
- Eligibility Determination
- Tier 2 Behavior

Additional Program(s): English Second Language (ESL) Parentally Placed Private School

Medicaid Status: Has Medicaid Number

Sort List By: Student's Last Name

Open Results in a New Window

View Students

Advanced Student Search

- Click on the 'Name' of the Student to inactivate.

Help | Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | My Info | | PCG

Select a Student

CP	Proj Elig	IEP End	School	Grade	Name	Student ID	Age	Date Of Birth	Dis	Case Manager
	04/29/2010	04/30/2008	0020	02	Norton Test	11111115	9 Years	05/02/2000	SLD	Woodrow Farley
	04/02/2010	04/02/2008	0020	05	Ralph Test	11111116	12 Years	05/05/1997	AUT	Woodrow Farley
	04/26/2010	05/03/2008	0021	10	Sandy A Test	789123456	18 Years	06/24/1991	DB,SI	James Aldinger
	01/11/2010	05/03/2008	0020	03	Shirley B Test	740234	11 Years	03/24/1998	VI	James Aldinger
<input checked="" type="checkbox"/>					Susie Student Test	TEST111	9 Years	10/02/1999		
	11/28/2009	05/03/2008	0020	12	Tony Test	111111183	20 Years	03/02/1989	SLD,SI	James Aldinger
	04/26/2010	05/03/2008	0021	P4	Tony C Test	49302847	6 Years	10/01/2002	DD	Theiry Henry

(7 Students)

- On the Student's personal page. Scroll to the bottom and click the button labeled 'Make This Student Inactive'.

Make this student inactive

- Enter the 'Date Exited', click on the 'Reason for Exiting' from the drop down list and click 'Update the Database'. The Date Exited is the last day of school or sometime within the school year. Please do not use an Exit Date after the last day of school, since this creates an error in EIS.

Exit Questionnaire for Tina Test

Date Exited:

Reason for Exiting:

Anticipated Services Required:

- Graduated with Regular Diploma
- Graduated with Special Ed. Diploma
- Graduated with High School Certificate
- Graduated with Regular Diploma by fulfilling IEP requirements
- Graduated with GED + 2
- Reached Maximum Age
- Dropped Out
- Deceased
- Moved, Known to be Continuing
- Transferred to Regular Education
- Compliance Violation
- Parent Withdrawal/Refused Services

Copyright © 1999-2

Primary/Secondary Options Report

When: Year-End

Review Primary/Secondary Options and Students with Blank Options ensuring the 'Combined Table 1&3 Dec 1 Report' is correct.

1. Click the School System Tab and click the Reports tab. Select the 'Primary/Secondary Options Report' and click the 'Create Report' button.

STATE REPORT SECTION	User Miss
ADM by Option Report (PDF) ?	UserAll(X)
ADM by Option Report - Details (txt) ?	MISC RE
ECO Date Report (Ages3-5) (PDF) ?	All IEP Sv
Inappropriately Served Court Report(PDF) ?	All IEP Sv
Options (txt) ?	All Studer
Options To Be Provided (PDF) ?	All Studer
Primary/Secondary Options Report (PDF) ?	All Studer
Primary/Secondary Options Report (TXT) ?	Child Cou
Status of Service Court Report (PDF) ?	Duplicate
Combined Table1 and Table3	ESY by S
Students Suspected Being Disabled(PDF) ?	ESY Liste
Active Student Listings (PDF)	Enrollm

2. Select the option to ‘Return Both Valid Primary Options and Blank Primary Options’ and select any additional parameters as needed. Click the ‘Generate Report’ button.

Help	Log Out	Main Menu	Students	My Docs	Wizards	Schools	School System	Users	My Info	PCG
Help	School System	System Info	Reports	Assign Schools	Inactive Students	User Types	External Systems			
Log Out	Main Menu	Summary	Lists	Assign Teachers	Inactive Users	User Type Assign	Transfer Student			

Reports - Primary/Secondary Options Report (PDF) (Help ?)

Select Students to Include:

Return Valid Primary Options
 Return Blank Primary Options
 Return Both Valid Primary Options and Blank Primary Options

Options Report Date

School:

Grade: (if none are checked, you get all grades)

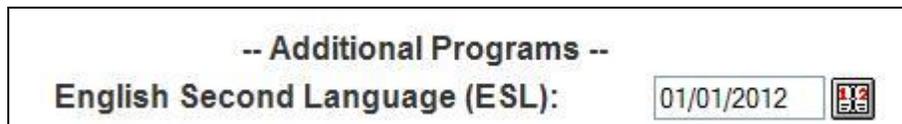
<input type="checkbox"/> P3 - (Pre-School)	<input type="checkbox"/> 4th Grade	<input type="checkbox"/> 10th Grade	<input type="checkbox"/> Fourth Grade - Transitional
<input type="checkbox"/> P4 - (Pre-School)	<input type="checkbox"/> 5th Grade	<input type="checkbox"/> 11th Grade	<input type="checkbox"/> Fifth Grade - Transitional
<input type="checkbox"/> Kindergarten	<input type="checkbox"/> 6th Grade	<input type="checkbox"/> 12th Grade	<input type="checkbox"/> Sixth Grade - Transitional
<input type="checkbox"/> 1st Grade	<input type="checkbox"/> 7th Grade	<input type="checkbox"/> First Grade - Transitional	<input type="checkbox"/> Seventh Grade - Transitional
<input type="checkbox"/> 2nd Grade	<input type="checkbox"/> 8th Grade	<input type="checkbox"/> Second Grade - Transitional	<input type="checkbox"/> Eighth Grade - Transitional
<input type="checkbox"/> 3rd Grade	<input type="checkbox"/> 9th Grade	<input type="checkbox"/> Third Grade - Transitional	

- Click on the Reports tab, scroll down to ‘Saved System Reports’ and click the report name to open. Review Primary/Secondary Options and Students with Blank Options.



English as a Second Language (ESL) Students

Enter the begin date in the ‘ESL’ field on the Student’s Eligibility tab, if a Student is participating in the ESL program. When a Student with an IEP is no longer receiving ESL service, remove the begin date from the ESL field indicating the end of ESL services. This information is reflected in federal reports and it is necessary that ESL information is entered correctly into the system. To remove Students from the ‘Limited English Proficient’ category in your federal reports, remove the begin date from the ESL field to show ESL services are completed.



Assign Test Students to ‘Sample School’

When: Year-End

‘Test Student’ records are assigned to ‘Sample School’ for training purposes. All federal reports and ‘End of Year’ reports do not include any ‘test Student’ records assigned to ‘Sample School’. There is no need to delete any ‘Test Student’ records. If you need help in assigning the ‘Test Student’ records to ‘Sample School’, submit a message to the Message Board and include the ‘Test Student Name’ and ‘ID Number’.

If you plan on having EasyIEP™ training sessions over the Summer or at the beginning of the school year, post a message requesting a new ‘Test Student’ record be added to your District site.

End-of-Year Reports

****When: Year-End****

Submit the 'End-of-Year Report' and 'February Court Report' to the Special Education office of Tennessee Department of Education. Mail these reports on or before June 30. Special Education Supervisors receive a very detailed memorandum on the specifics regarding the 'End of Year' report packet.

The 'End-of-Year' report includes the following tables:

- Table 1 – End of Year Frequency Report (EasyIEP™)
- Table 2 – Personnel Employed (EasyIEP™)
- Table 4 – Report of Students with Disabilities Ages 14-21 Exiting Report (EasyIEP™)

The February Court Report includes the following reports:

- Status of Service Court Report (EasyIEP™)
- Inappropriately Served Court Report (EasyIEP™)
- Students Suspected of Being Disabled (EasyIEP™)

Contact the EasyIEP™ Help Desk at 1-888-212-3162 for assistance with End-of-Year Reports.

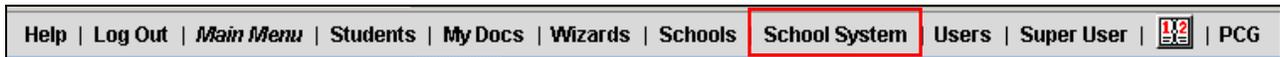
If you have questions about Federal Tables 2 and 4 or State Table 1 & 3 or February 1 Court Report, contact the EasyIEP™ Help Desk for assistance.

If you have questions about the reporting counts of Intellectually Gifted Students to the State, contact Theresa Nicholls, Evaluations Coordinator at (615) 741-0572 or theresa.nicholls@tn.gov .

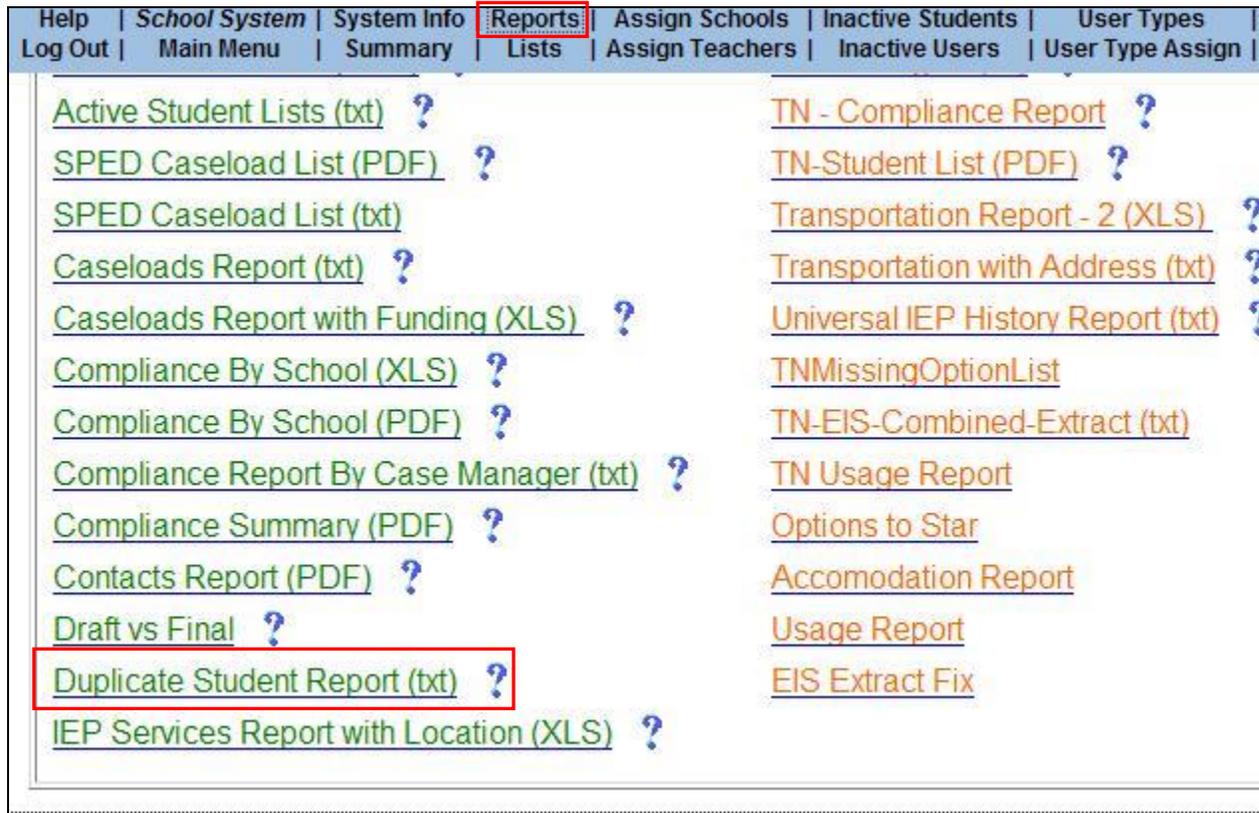
Review Duplicate Students

When: Year-End

1. Review Student records to identify duplicate Students for deletion from EasyIEP™. On the Main Menu page click the School System tab.

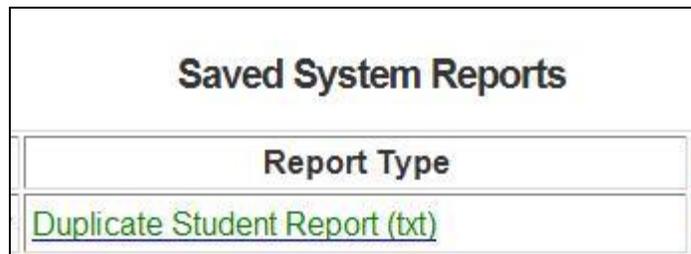


2. Click on the Reports tab. Select the 'Duplicate Student Report' and click 'Generate Report'. This report is set to run overnight avoiding processing delays during the day. To retrieve the report, return to the Reports tab and scroll down to the 'Saved System Reports' section.



Send a message to the Message Board requesting this report be added to the Reports tab, if this report is not listed on your site.

3. To retrieve the report, return to the Reports tab and scroll down to the 'Saved System Reports' section. Click on the report to open or right-click to save the report to the computer.



4. Review the duplicate Students found in the report. Identify the Student records that need deleting. Post a request to the Message Board to delete duplicate Students. Include the Student's Name, ID Number, and Date of Birth to ensure the correct Student is removed. When a Student record is deleted, all data associated with the Student is also deleted and not retrievable.

Review Duplicate Document Report

****When: Year-End****

This report is a management tool for reviewing duplicate documents. This report lists all documents created in the system. Districts must review duplicate IEP documents and IEP Addendums. Districts must verify these documents are not identical in content. Example: If a District has multiple IEP documents with the same begin and end dates and the same content (services, assessments, goals, etc.), this is a duplicate document and the incorrect document must be deleted. Additionally, if Progress Reports exist under a duplicate IEP document, they must also be deleted.

1. Review IEP documents and identify duplicate documents that need deleting from EasyIEP™. From the Main Menu page click on the School System tab.



2. Click on the Reports tab, select the 'Duplicate Document Report' and click 'Generate Report'. This report is in the yellow 'Misc. Report Section'. This report is set to run overnight to avoid processing delays during the day.

Help | Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User | PCG

Help | School System | System Info | **Reports** | Assign Schools | Inactive Students | User Types | External Systems
Log Out | Main Menu | Summary | Lists | Assign Teachers | Inactive Users | User Type Assign | Transfer Student

Scheduled Reports

FEDERAL REPORT SECTION

[DRAFT Combo Table 1&3 Dec1 Report \(PDF\) ?](#)
[DRAFT Combo Table 1&3 Dec1 Report \(txt\) ?](#)
[Personnel Report Table 2 \(PDF\) New 09 ?](#)
[Exited Student Report Table 4 \(PDF\)New 09 ?](#)
[Exited Student Report-w/ details\(txt\) 09 ?](#)
[Exited Student Report \(Table 4\)](#)

STATE REPORT SECTION

[ADM by Option Report \(PDF\) ?](#)
[ADM by Option Report - Details \(txt\) ?](#)
[ECO Date Report \(Ages3-5\) \(PDF\) ?](#)
[Inappropriately Served Court Report\(PDF\) ?](#)
[Options \(txt\) ?](#)
[Options To Be Provided \(PDF\) ?](#)
[Primary/Secondary Options Report \(PDF\) ?](#)
[Primary/Secondary Options Report \(TXT\) ?](#)
[Status of Service Court Report \(PDF\) ?](#)
[Students Suspected Being Disabled\(PDF\) ?](#)
[Combined Table1 and Table3](#)
[TN Cover Page \(PDF\) ?](#)
[TN-End of Year Frequency Report \(PDF\) ?](#)
[Active Student Listing \(PDF\)](#)

[Participations Report \(PDF\) ?](#)
[Projected Eligibility Meetings \(PDF\) ?](#)
[Projected Eligibility Meetings \(txt\) ?](#)
[Projected IEP Meetings \(PDF\) ?](#)
[Projected IEP Meetings \(txt\) ?](#)
[Schools \(txt\) ?](#)
[Services Report \(PDF\) ?](#)
[Student Missing Data \(txt\) ?](#)
[User Missing Data \(txt\) ?](#)
[UserAll \(XLS\) ?](#)

MISC REPORT SECTION

[All IEP Svcs Report w/ Minutes \(txt\) ?](#)
[All IEP Svcs Report w/ Minutes \(XLS\) ?](#)
[All Student Export - SPED Only \(txt\) ?](#)
[All Student Export - SPED Only \(XLS\) ?](#)
[All Student Export \(txt\) ?](#)
[Child Count \(PDF\) ?](#)
[Duplicate Document Report \(txt\) ?](#)
[ESY by School and Case Manager \(XLS\) ?](#)
[ESY Listed by Services \(XLS\) ?](#)
[Exited Student Report \(PDF\) ?](#)
[Flexible Listing Report \(PDF\) New 08 ?](#)

3. Select a 'School' or 'All Schools' from the drop down menu. Enter a 'Begin Date' and 'End Date', usually the first and last days of the current school year. Click 'Generate Report'.

Reports - Duplicate Document Report (txt) (Help ?)

School:

Dates Range: Begin: End:

4. To retrieve the report, return to the Reports tab and scroll down to the 'Saved System Reports' section. Click on the report name to open or right-click to save the report to your computer.

Saved System Reports	
Report Type	
Duplicate Document Report (txt)	

- Review the duplicate documents found in the report and identify which documents need deleting from EasyIEP™. If the document is less than 365 days old, the District's EasyIEP™ Administrator has permission to delete documents from the Student document page or the Student's history page. If the document is greater than 365 days old, post a message to the Message Board requesting the document be deleted. Please include in the message the Student's name, date of birth, document title, document number or event number of the document for deletion.

Beth Test	TEST101 IEP	07/30/2011
Beth Test	TEST101 IEP	12/19/2011
Beth Test	TEST101 IEP Addendum	10/06/2011
Beth Test	TEST101 IEP Addendum	12/19/2011
Beth Test	TEST101 IEP At-a-Glance	01/09/2012
Beth Test	TEST101 IEP At-a-Glance	01/09/2012
Beth Test	TEST101 Progress Report	02/10/2012
Beth Test	TEST101 Progress Report	02/13/2012
Beth Test	TEST101 Progress Report	02/15/2012

Check Eligibility and IEP Due Dates

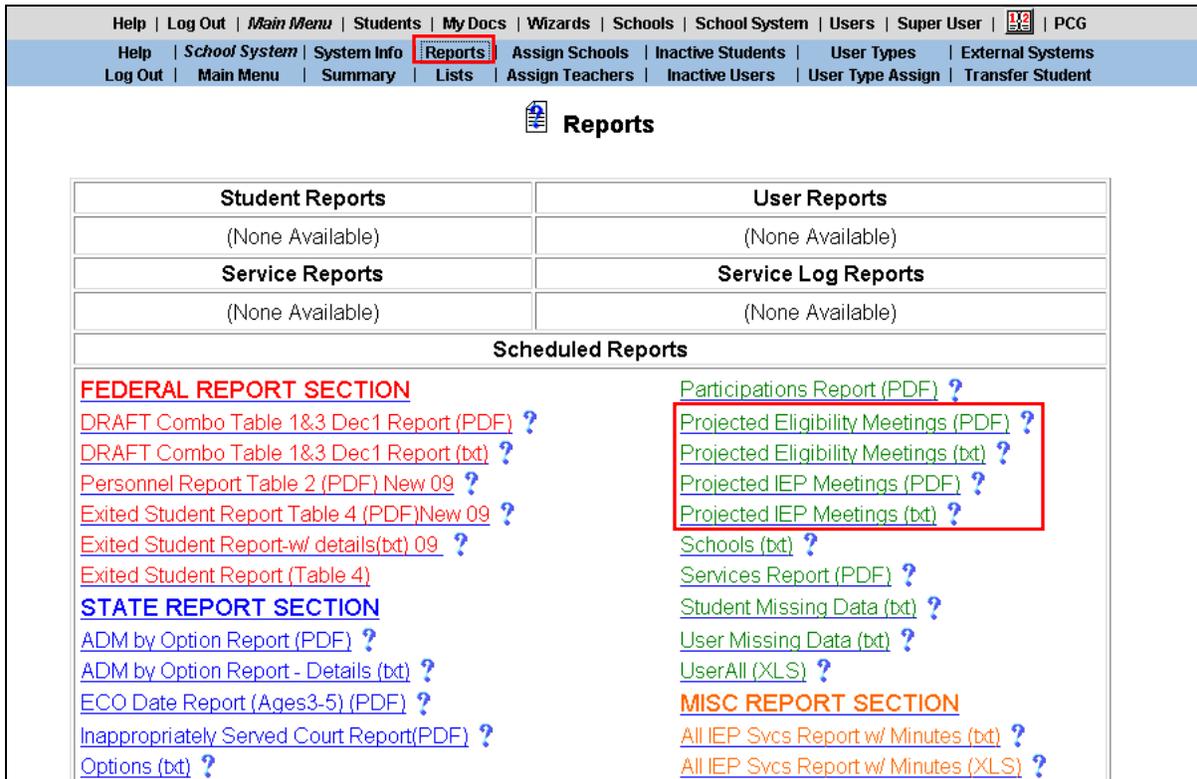
When: Year-End

When the new school year begins, review Eligibility and IEP dates that are due for renewal during the Summer ensuring compliancy.

- Two EasyIEP™ reports are available for reviewing Eligibility and IEP dates. Click on the School System tab on the main menu bar.



- Click on the Reports tab, select the 'Projected IEP Meetings' or 'Projected Eligibility Meetings' report and click 'Create Report'. The option of creating the reports as either PDF documents for easy viewing or as text files is available allowing more flexibility in sorting or reformatting the data using Microsoft Excel (or another spreadsheet program).



- Select the criteria for the Students included in the report. To see all Students with due dates during the Summer, scroll down and enter the last day of the current school year in the 'On or After' date field. Select specific sorting by 'School' or by 'Date'. Click 'Generate Report'. These reports may be set to run overnight to avoid processing delays during the day.

Reports - Projected IEP Meetings (PDF) (Help ?) New Mail!

Select Students to Include:

School:

Grade: (if none are checked, you get all grades)

<input type="checkbox"/> P3 - (Pre-School)	<input type="checkbox"/> 4th Grade	<input type="checkbox"/> 10th Grade	<input type="checkbox"/> Fourth Grade - Transitional
<input type="checkbox"/> P4 - (Pre-School)	<input type="checkbox"/> 5th Grade	<input type="checkbox"/> 11th Grade	<input type="checkbox"/> Fifth Grade - Transitional
<input type="checkbox"/> Kindergarten	<input type="checkbox"/> 6th Grade	<input type="checkbox"/> 12th Grade	<input type="checkbox"/> Sixth Grade - Transitional
<input type="checkbox"/> 1st Grade	<input type="checkbox"/> 7th Grade	<input type="checkbox"/> First Grade - Transitional	<input type="checkbox"/> Seventh Grade - Transitional
<input type="checkbox"/> 2nd Grade	<input type="checkbox"/> 8th Grade	<input type="checkbox"/> Second Grade - Transitional	<input type="checkbox"/> Eighth Grade - Transitional
<input type="checkbox"/> 3rd Grade	<input type="checkbox"/> 9th Grade	<input type="checkbox"/> Third Grade - Transitional	

Disability: (if none are checked, you get all disabilities)

<input type="checkbox"/> Specific Learning Disability	<input type="checkbox"/> Intellectually Gifted	<input type="checkbox"/> Traumatic Brain Injury
<input type="checkbox"/> Autism	<input type="checkbox"/> Intellectual Disability	<input type="checkbox"/> Visual Impairments
<input type="checkbox"/> Deaf-Blindness	<input type="checkbox"/> Multiple Disabilities	<input type="checkbox"/> Language Impairments
<input type="checkbox"/> Deafness	<input type="checkbox"/> Orthopedic Impairments	<input type="checkbox"/> Developmental Delay
<input type="checkbox"/> Emotional Disturbance	<input type="checkbox"/> Other - Health Impairments	<input type="checkbox"/> Hearing Impairments
<input type="checkbox"/> Functional Delay	<input type="checkbox"/> Speech Impairments	<input type="checkbox"/> Blind

Disabilities

Report on students with projected IEP date:

On or After:

Before:

Sort by Projected IEP Date

Group by School

Generate Report

4. When the report is completed, return to the Reports tab and click on the report name to open. Right click on the report name to save the report file to the computer.

Review User Information/FTE

****When: Year-End****

Update FTE information in the New State and Federal Report Section at the bottom of the 'User Information' page.

It is important to review and update 'Employment Type' and 'FTE' before running your Federal Table 2 Personnel Report (as part of your 'End-of-Year' reports).

1. Click on the Users tab on the main menu navigation bar in EasyIEP™. In the search criteria enter the 'Last Name' of the User and click 'View Users'. A list of Users appear; click on the appropriate 'User's Name'.

2. Scroll down to the new State and Federal Personnel Report Information at the bottom of the 'User Information' page. Review the 'District Employment Begin Date', 'District Employment End Date', 'License Type' and 'Waiver' for each staff member. Enter a 'District Employment Begin Date' for all Users included in the Table 2 report. If the 'District Employment Begin Date' is complete, then also enter 'License Type' and 'Waiver'. All three fields are required for the Table 2 Report.

3. Review the 'Employment Type' and 'FTE' fields. Section 1A, 1B and 1C are for reporting the number of FTE Special Education Teachers, Paraprofessionals and Related Service Providers contracted or employed who provide special education services, according to whether or not the teachers are highly qualified.

Special education teachers include teachers employed who provide special education services to Students with disabilities, including preschool teachers, itinerant/consulting teachers, and home/hospital teachers. This section should include teachers of Students with disabilities in separate schools and facilities. (Do NOT include regular education preschool teachers who work with Students with disabilities.)

Paraprofessionals are employees who provide instructional support, including those who:

- (1) Provide one-on-one tutoring if such tutoring is scheduled at a time when a Student would not otherwise receive instruction from a teacher,
- (2) Assist with classroom management, such as organizing instructional and other materials,
- (3) Provide instructional assistance in a computer laboratory,
- (4) Conduct parental involvement activities,
- (5) Provide support in a library or media center,
- (6) Act as a translator, or
- (7) Provide instructional support services under the direct supervision of a teacher. Do not include paraprofessionals working with Students with disabilities in a regular preschool setting.

If a User is categorized with two separate Employment Types in sections 1A, 1B, or 1C, which means they split their time between two different positions, complete multiple Employment Type and FTE fields.

For questions on how to adjust this information please contact the EasyIEP™ Help Desk.

The screenshot shows the 'Users' tab in the EasyIEP™ administrator interface. It displays two sections for defining user types:

- Section 1A -- "Special Education Teacher Employment Type"**: Includes instructions and a dropdown menu for selecting an employment type. The dropdown options are:
 - Highly Qualified - Special Education Teacher for Ages 3-5
 - Not Highly Qualified - Special Education Teacher for Ages 3-5
 - Highly Qualified - Special Education Teacher for Ages 6-21
 - Not Highly Qualified - Special Education Teacher for Ages 6-21
- Section 1B -- "Paraprofessional Employment Type"**: Includes instructions and a dropdown menu for selecting an employment type.

4. Click 'Update the database' button.

Inactivate Users

When: Year-End

Review Users in EasyIEP™ and inactivate Users that no longer provided special education services in the District.

1. Click on the Users tab on the main menu bar and search for the User by 'Name' or 'User Type'.

The screenshot shows the 'Criteria for Selecting Users to View' form in the EasyIEP™ administrator interface. The 'Users' tab is highlighted in the top navigation bar. The form includes the following fields and options:

- School:** A dropdown menu currently set to 'All Schools'.
- User Types:** A list of checkboxes for selecting user roles. The text '(check none to get all user types)' is displayed. Roles include:
 - superuser, School System Administrator, Principal, School Administrator, IEP Chairperson (Case Manager), Case Supervisor, Psychologist, Speech Teacher, StateReviewTeam, Director, School System Staff, Clinician Supervisor, IT Users, School Staff, Team Member (IEP), External Provider, Provider, Aide, Statewide Administrator, Consulting Teacher, Special Education Classroom Teacher, Clinician, DOE Support, State Monitor.
- User Last Name:** A text input field with an 'Exact Match' checkbox.
- Title:** A text input field with an 'Exact Match' checkbox.
- User Code:** A text input field with an 'Exact Match' checkbox.
- Sort List By:** A dropdown menu currently set to 'User's Last Name'.
- View User(s):** A button at the bottom of the form.

- Click on the User's Name and edit User information.

Help | Log Out | *Main Menu* | Students | My Docs | Wizards | Schools | School System | Users | My Info | | PCG

Select a User

Cp	Name	School(s)	Stud	Title	User Type	E-mail Address
<input type="radio"/>	Test Smith	-All-	0, 11		IEP Chairperson (Case Manager)	

(1 Users)

- Enter the 'Employment End Date' (month, day, and year) the special education employee leaves their position or made inactive for other reasons in the District.

Help | Log Out | *Main Menu* | Students | My Docs | Wizards | Schools | School System | Users | Super User | | PCG

State and Federal Personnel Report Information Section

Section 1
Instructions:
(1) For the District Employment Begin Date, enter the date (month, day, and year) this special education staff person was initially employed in this school district.
(2) If the staff person leaves their position or must be made inactive for other reasons, then enter the date (month, day, and year) this special education staff person leaves their special education position in this school district in the District Employment End Date field. Then, scroll to the bottom of the screen and click on the "Delete this user from the database" button to complete the inactivation. Inactivated users can be viewed and/or re-activated from the Main Menu by clicking on the School System button, then click on the Inactive Users button to search for an inactive user.
(3) Select the appropriate License Type for this staff person. If no license is required for their position, select N/A under License Type.
(4) If this staff person has a waiver to be employed in their current position, select the Yes button beside Waiver. Otherwise, select No.

District Employment Begin Date:

District Employment End Date:

License Type: [-Select a License Type-]

Waiver:
 Yes No

- Scroll to the bottom of the screen and click on the 'Delete this User from the database' button to complete the inactivation. Inactivated Users are viewed and/or re-activated from the Main Menu by clicking on the School System tab and Inactive Users tab and search for an Inactive User.

[How to](#)

- To deactivate multiple Users that are NOT included in FTE and therefore do not need District Employment End Dates, repeat Step 1. On the 'Select a User' page, click the 'Delete' checkbox next to all Users to deactivate. Scroll to the bottom and click 'Inactivate Selected Users'. Only Users with User Type 'Director' have access to this functionality.

Del	Cp	Name	School(s)	Stud	Title	User Type	E-mail Address
<input type="checkbox"/>		Edplan HelpDesk Test	-All-	0, 0		EdPlan Help Desk Staff	
<input type="checkbox"/>	<input checked="" type="radio"/>	Mark Test	-All-	0, 3		eStar Administrator	
<input type="checkbox"/>		Mike Test	-none-	0, 0		Graduation Coach Coordinator	

(3 Users)

Inactivate Selected Users

- Confirm the Users you want to deactivate and click 'Yes, I'm sure' or 'No, I changed my mind'.

Delete User(s)

Please review the following list of users to be certain you want to deactivate these users

- 1. Mark Test (1751)

Yes, I'm sure **No, I changed my mind**

Start-Up Procedures

This group of procedures assists the District with identifying important tasks at the beginning of the school year.

Student Data Uploads

****When: Startup****

Student data is populated in EasyIEP™ through extracts from district student information systems (SIS); students must have an enrollment record in the district's SIS package and have a state ID in place to accurately load in EasyIEP™.

Build Caseloads and Assign Case Managers

****When: Start-Up****

Please do not adjust Case Managers for the next school year until PCG begins processing Student data upload files. It is easier to wait on this task, until all of the Students are assigned the correct grade level and/or school for the new school year.

Since some teachers only have access to a few grades and/or schools, Students may be removed from caseloads and Case Managers may no longer be on Student IEP teams.

Once Students are assigned a new grade level and/or school, Student and Case Manager associations are reviewed and the District may begin building caseloads for the New School Year.

There are two approaches to building caseloads and assigning Case Managers: Assign Teachers tab and Team page. Use the Assign Teachers tab to make multiple changes at one time or use the Team page to make changes for individual Students.

Assign Case Manager to Multiple Students at One Time:

1. Click on the School System tab from the main menu. Click on Assign Teachers to assign multiple Students a Case Manager at one time. Select Students by 'Grade Level', 'School', or 'Last Name'. Click 'Assign Case Managers to these Students'.

Help | Log Out | Main Menu | Students | My Docs | Wizards | Schools | **School System** | Users | Super User | | PCG

Help | **School System** | System Info | Reports | Assign Schools | Inactive Students | User Types | External Systems
Log Out | Main Menu | Summary | Lists | **Assign Teachers** | Inactive Users | User Type Assign | Transfer Student

Criteria for Selecting Students to Assign Case Manager

Grade Level:

School:

Student Last Name: Exact Match

Student ID: Exact Match

Status:

GeneralEd ChildStudy

Referred SpecialEd

ESL Parentally Placed Private School

Medicaid Eligible

Only Students with no Case Manager currently assigned

Sort List By:

- Click the drop down arrow and choose the appropriate Case Manager for each Student. A User's name appears in the drop down list if they have access to the school. Click 'Update the Database'.

 **Assign Case Manager to Students**

Note: Students with no School assigned will not appear in this list. You will have to assign a School to them first.

Student	School	Grade	Case Manager
Norton Test	0020	02	Test Smith
Ralph Test	0020	05	Test Smith
Sandy A Test	0021	10	Test Smith
Shirley B Test	0020	03	Test Smith
Tony Test	0020	12	Test Smith
Tony C Test	0021	P4	Test Smith

Assign a Case Manager One Student at a Time:

- To update the Case Manager for individual Student records, click on the Students tab on the main menu bar and then search for the Student. Search for the Student using either the first few letters of the 'Name' or the 'Student ID'. Click the 'View Students' button.

Help | Log Out | Main Menu | **Students** | My Docs | Wizards | Schools | School System | Users | Super User |  | PCG

 **Criteria for Selecting Students to View**

Grade Level:

School:

Student Last Name: Exact Match

Student First Name: Exact Match

Student Middle Name: Exact Match

Student ID: Exact Match

State ID Number: Exact Match

Status: General Ed Eligibility IEP
 Referral Special Ed Discontinued
 Written Parental Permission Received

Additional Program(s): ESL Parentally Placed Private School

Medicaid Status: Medicaid Eligible

Sort List By:

Open Results in a New Window

- To choose a Student, click on the 'Name' of the Student.

Help | Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User | | PCG

Select a Student

Del	CP	Proj Elig	IEP End	School	Grade	Name	Student ID	Age	Date Of Birth	Dis	Case Manager
<input type="checkbox"/>	<input checked="" type="radio"/>	04/29/2010	04/30/2008	0020	02	Norton Test	11111115	9 Years	05/02/2000	SLD	Woodrow Farley
<input type="checkbox"/>	<input checked="" type="radio"/>	04/02/2010	04/02/2008	0020	05	Ralph Test	11111116	12 Years	05/05/1997	AUT	Woodrow Farley
<input type="checkbox"/>	<input checked="" type="radio"/>	04/26/2010	05/03/2008	0021	10	Sandy A Test	789123456	18 Years	06/24/1991	DB,SI	
<input type="checkbox"/>	<input checked="" type="radio"/>	01/11/2010	05/03/2008	0020	03	Shirley B Test	740234	11 Years	03/24/1998	VI	
<input type="checkbox"/>	<input checked="" type="radio"/>					Susie Student Test	TEST111	9 Years	10/02/1999		
<input type="checkbox"/>	<input checked="" type="radio"/>	11/28/2009	05/03/2008	0020	12	Tony Test	111111183	20 Years	03/02/1989	SLD,SI	
<input type="checkbox"/>	<input checked="" type="radio"/>	04/26/2010	05/03/2008	0021	P4	Tony C Test	49302847	6 Years	10/01/2002	DD	Theiry Henry

(7 Students)

- Click the Team page to view members of the Student's current IEP Team. Click the Case Manager drop down arrow and select the new Case Manager. Click 'Update the database'.

Help | Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User | | PCG

Help | Students | Personal | Eligibility | Assessments | Participations | Goals & Objectives | Special Ed Services | EC Transition | Contacts | ECO Ages 3-5
Log Out | Main Menu | Parents | **Team** | Narratives | Accommodations | Supplemental Aids | Related Services | TransitionServices | Documents |

IEP Team for Tony Test View:

Case Manager:

	-none-
	Woodrow Farley
Name	Theiry Henry
Mr. and Mrs. Te	TL Long
	Test Smith

Select IEP Team

Update the database

Update User Information

****When: Start-Up****

It is important to review and update all User information in EasyIEP™ to protect Student data and comply with federal law. To ensure that your District is in compliance with the Family Educational Rights and Privacy Act (FERPA), keep all personnel data in the 'State and Federal Personnel Report Information Section' current throughout the year.

1. Inactivate all Users no longer providing special education services in the District. Enter an 'Employment End Date' before inactivating the User. This step is also included in the Year-End procedures, so you may have already inactivated many of the Users not returning to your District in the new school year. Please review Users currently in EasyIEP™ and inactivate Users no longer providing special education services.
2. Be prepared to reset passwords for Users who have forgotten their login information. Remind Users their 'Username' is 'first name space last name'. Passwords are case sensitive and are at least eight characters long including at least one capital letter and one special character and one number.
3. Reset any User email addresses as needed. Please send any new email addresses to the Message Board TO update the EasyIEP™ email distribution list.
4. Review all 'FTE' information for existing Users and confirm information is current and updated. Review 'FTE', 'Assignment Area', 'Employment Begin Date' and 'Employment Status'. Speech teachers must have a 'Certificate Level' and 'Certificate End Date'. This step is also included in the Year-End procedures, so you may have already updated FTE information for most of the Users in your system.

The new 'State and Federal Personnel Report Information Section' begins about halfway down on the 'User Information' page in red type. Keep all User information current throughout the year to ensure compliance with the Family Educational Rights and Privacy Act (FERPA).

Help | Log Out | [Main Menu](#) | [Students](#) | [My Docs](#) | [Wizards](#) | [Schools](#) | [School System](#) | [Users](#) | [Super User](#) | | PCG

State and Federal Personnel Report Information Section

Section 1
Instructions:

(1) For the District Employment Begin Date, enter the date (month, day, and year) this special education staff person was initially employed in this school district.
 (2) If the staff person leaves their position or must be made inactive for other reasons, then enter the date (month, day, and year) this special education staff person leaves their special education position in this school district in the District Employment End Date field. Then, scroll to the bottom of the screen and click on the "Delete this user from the database" button to complete the inactivation. Inactivated users can be viewed and/or re-activated from the Main Menu by clicking on the School System button, then click on the Inactive Users button to search for an inactive user.
 (3) Select the appropriate License Type for this staff person. If no license is required for their position, select N/A under License Type.
 (4) If this staff person has a waiver to be employed in their current position, select the Yes button beside Waiver. Otherwise, select No.

District Employment Begin Date:

District Employment End Date:

License Type:

Waiver:
 Yes No

It is not necessary to complete the disability-specific information in the section immediately under the 'Add Assignment Area' button.

(please enter FTE as #.## where # is a digit)

[Add Assignment Area](#)

Disabilities:	Can Provide	FTE	Certified	Certifications
Specific Learning Disability (1)	<input type="checkbox"/>	<input type="text"/>		View
Autism (7)	<input type="checkbox"/>	<input type="text"/>		View
Deaf-Blindness (14)	<input type="checkbox"/>	<input type="text"/>		View
Deafness (10)	<input type="checkbox"/>	<input type="text"/>		View

Review User Types

When: Start-Up

FERPA requires staff access be limited to Students within their purview. EasyIEP™ manages access to Student records by 'User Type'. It is highly recommended the permissions set for each 'User Type' are reviewed annually ensuring Student data is protected.

1. Click on the School System tab and click on the User Types tab.

Del	ID	User Type	# Users	Assoc with All Schools	Assoc with All Grades	Can Be Case Manager	Can Be IEP Team Member	Can Be Aggregate User	Can Be System Contact
<input type="checkbox"/>	1	superuser	41	yes	yes	no	no	yes	no
<input type="checkbox"/>	2	School System Administrator	0	no	no	no	yes	no	no
<input type="checkbox"/>	3	Principal	0	no	yes	no	yes	no	no
<input type="checkbox"/>	6	School Administrator	0	no	yes	no	yes	no	no

2. Click on the 'User Type' to review.
3. Also review the 'View Permissions', 'View Page Access', 'View Document Permissions', and 'View Report Permissions' by clicking the corresponding button.

Name:	Case Supervisor
Assoc with All Schools:	no
Assoc with All Grades:	yes
Can Be Case Manager:	yes
Can Be IEP Team Member:	yes
Grades:	All

View Permissions

View Page Access

View Document Permissions

View Report Permissions

Add Compliance E-mail Alert

Add Static E-mail Alert

Update the database

Add New Users

****When: Start-Up****

Add new Users to EasyIEP™ including new teachers, administrative staff, therapists and other school support personnel that contribute to a Student’s IEP. You must have permission to add new Users. If you do not see the ‘Add New User’ button at the bottom of the Users page, your User Type does not have access to add new Users. If you need access, please have the Director submit a message to the Message Board to request a change to your User Type.

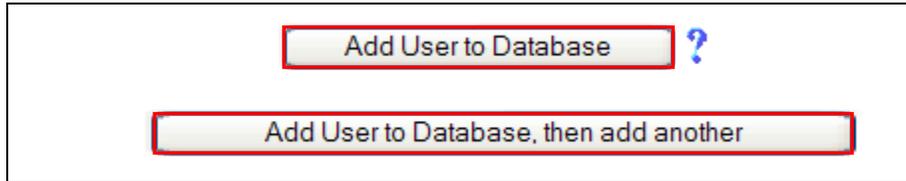
New staff members are added as new Users in EasyIEP™. Do not update an old User profile by simply changing the name to the new User name. User Codes are uniquely assigned to each User and cannot be reused.

1. From the Main Menu, Click on the Users tab.



2. Click on the ‘Add New User’ button.

- Click the 'Add User to Database' button, or to add more than one User at a time, click the 'Add User to Database, then add another' button.



- Once the new User is added, enter the Personnel Information. Search for the User from the Users tab (see Step 1 above), enter the 'Last Name' and click 'View User(s)'. Click on the User's name and enter the User's personnel information. Scroll down to 'State and Federal Personnel Report Information' section at the bottom of the 'User Information' page. Enter the 'District Employment Begin Date', 'License Type' and 'Waiver' for each of your staff members. Enter a 'District Employment Begin Date' for all Users who should be counted in the Table 2 report. If the 'District Employment Begin Date' is complete, enter 'License Type' and 'Waiver'. All three fields are required for the Table 2 Report.

Help | Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User | | PCG

State and Federal Personnel Report Information Section

Section 1

Instructions:

(1) For the District Employment Begin Date, enter the date (month, day, and year) this special education staff person was initially employed in this school district.

(2) If the staff person leaves their position or must be made inactive for other reasons, then enter the date (month, day, and year) this special education staff person leaves their special education position in this school district in the District Employment End Date field. Then, scroll to the bottom of the screen and click on the "Delete this user from the database" button to complete the inactivation. Inactivated users can be viewed and/or re-activated from the Main Menu by clicking on the School System button, then click on the Inactive Users button to search for an inactive user.

(3) Select the appropriate License Type for this staff person. If no license is required for their position, select N/A under License Type.

(4) If this staff person has a waiver to be employed in their current position, select the Yes button beside Waiver. Otherwise, select No.

District Employment Begin Date:

District Employment End Date:

License Type:

Waiver: Yes No

- Review the 'Employment Type' and 'FTE' fields. Section 1A, 1B and 1C are for reporting the number of FTE Special Education Teachers, Paraprofessionals and Related Service Providers contracted or employed to work with Students receiving special education, according to whether or not the teachers are highly qualified.

Special education teachers include teachers employed to provide special education to Students with disabilities, including preschool teachers, itinerant/consulting teachers, and home/hospital teachers. This section should include teachers of Students with disabilities in separate schools and facilities. (Do NOT include regular education preschool teachers who work with Students with disabilities.)

Paraprofessionals are employees who provide instructional support, including those who:

- (1) Provide one-on-one tutoring if such tutoring is scheduled at a time when a Student would not otherwise receive instruction from a teacher,
- (2) Assist with classroom management, such as organizing instructional and other materials,
- (3) Provide instructional assistance in a computer laboratory,
- (4) Conduct parental involvement activities,
- (5) Provide support in a library or media center,
- (6) Act as a translator
- (7) Provide instructional support services under the direct supervision of a teacher. (Do not include paraprofessionals who work with Students with disabilities in a regular preschool setting.)
- (8) Certified Occupational Therapist Assistants and Certified Physical Therapist Assistants

If a User is categorized with two separate Employment Types in sections 1A, 1B, or 1C, meaning they split their time between two different positions, complete multiple Employment Type and FTE fields.

If there are any questions on how to adjust this information please contact the EasyIEP™.

Help | Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User | | PCG

Section 1A -- "Special Education Teacher Employment Type"

Instructions:
For staff employed as special education teachers, select the appropriate age level taught and highly qualified status. If a special education teacher's caseload is 51% or more students ages 3-5, then select ages 3-5 as the age level for their teaching position. Teachers reported as highly qualified must meet the State standard based on the definition of highly qualified in 20 U.S.C. Section 1401(10). If teachers who work with children ages 3 through 5 or others are not included in the State's definition of highly qualified, report these personnel as highly qualified if they have the appropriate license for the position they hold.

Special Education Teacher Employment Type:

Special Education Teacher FTE (format #.##)

Section 1B -- "Paraprofessional Employment Type"

Instructions:

Highly Qualified - Special Education Teacher for Ages 3-5

Not Highly Qualified - Special Education Teacher for Ages 3-5

Highly Qualified - Special Education Teacher for Ages 6-21

Not Highly Qualified - Special Education Teacher for Ages 6-21

7. Click 'Update the database' button to save changes.

New User Training

****When: Start-Up****

Many Districts conduct EasyIEP™ trainings for new and returning teachers at the beginning of the year. Trainers should reference the 'Train-the-Trainer' document previously provided for suggestions and key points to emphasize during training. Please post a message to the Message Board to request an additional 'Test Student' record for training. When the training schedule is determined, please post a message to the Message Board with the dates for training. It is important that TDOE and PCG know when training is planned, so we can have staff available to answer system questions and best support your training sessions.

Update District Calendar

****When: Start-Up****

1. Add the new school year to the Calendar. Click on the Calendar icon on the main menu bar. Scroll to the bottom and click on the 'Edit School Years' button.

Help | Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User | | PCG

Month: May Year: 2009

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					* 1	2
3	* 4	* 5	* 6	* 7	* 8	9
10	* 11	* 12	* 13	* 14	* 15	16
17	* 18	* 19	* 20	* 21	* 22	23
24	* 25	* 26	* 27	* 28	* 29	30
31						

Legend: = * school day = holiday = teacher workday = teacher inservice = abbreviated school day = Snow Day = weekend = * summer

* = Services Provided

[Edit School Years](#)

2. Scroll to the bottom and Click the 'Add next school year' button to add a line for the new school year.

Edit School Years New Mail								
Del	School Year	Begin Date	End Date	Cal Days	Sch Days	ESY Schedule	Report Periods	Report Periods (ADM Reporting Periods)
	2011-2012	08/03/2011	05/28/2012	300	179	Edit	Edit	Edit
<input type="checkbox"/>	2012-2013	08/04/2012	05/25/2013	295	209	Edit	Edit	Edit
<input type="checkbox"/>	2013-2014	08/03/2013	05/25/2014	296	209	Edit	Edit	Edit
<input type="checkbox"/>	2014-2015	07/01/2014	06/30/2015	365	260	Edit	Edit	Edit

[Update the database](#)

[Add previous school year](#) [Add next school year](#)

Future calendars are added using temporary 'place holder' dates that are easily updated when the school board sets the actual dates. A good set of placeholder dates are the federal reporting period dates of July 1 as begin date and June 30 of the following year as the end date.

3. Enter the 'Begin Date' and 'End Date' for the new school year. Click on the Calendar icon again to return to the 'Calendar' view page.

<input type="checkbox"/>	2011-2012	08/03/2011	05/28/2012	300	179	Edit	Edit	Edit
<input type="checkbox"/>	2012-2013	08/04/2012	05/25/2013	295	209	Edit	Edit	Edit
<input type="checkbox"/>	2013-2014	08/03/2013	05/25/2014	296	209	Edit	Edit	Edit
<input type="checkbox"/>	2014-2015	07/01/2014	06/30/2015	365	260	Edit	Edit	Edit

When the school year calendar dates are updated on the 'Edit School Years' page, this sets all of the week days to instructional school days (green). The District must enter any non-school days and Summer days.

4. Select the 'Month' and 'Year' to view each month of the school year. Click on a specific date to mark it as a non-school day.

Day	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
	* 3	* 4	* 5	* 6	* 7	8
	* 10	* 11	* 12	* 13	* 14	15
	* 17	* 18	* 19	* 20	* 21	22
	* 24	* 25	* 26	* 27	* 28	29

Legend: ■ = * School Day ■ = Holiday ■ = Teacher Workday ■ = Teacher Inservice ■ = * Abbreviated School Day ■ = Snow Day ■ = Weekend ■ = Summer

- Select the 'Day Type' from the drop down menu options and enter a 'Label' to appear on the calendar. Click 'Update the database' to save changes.

Edit Day Type 9/3/2012 [New Mail!](#)

Level	Day Type	Label
School System	Holiday ▼	Labor Day Holiday

- To mark multiple days as non-school days, click on the first date in the series.

Log Out | [Main Menu](#) | [Students](#) | [My Docs](#) | [Wizards](#) | [Schools](#) | [School System](#) | [Users](#) | [Super User](#) | [Help](#)

Month: October Year: 2012

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	* 1	* 2	* 3	* 4	* 5	6
	* 8	* 9	* 10	* 11	* 12	13
4	* 15	* 16	* 17	* 18	* 19	20
1	* 22	* 23	* 24	* 25	* 26	27
8	* 29	* 30	* 31			

Legend: ■ = * School Day ■ = Holiday ■ = Teacher Workday ■ = Teacher Inservice ■ = * Abbreviated School Day ■ = Snow Day ■ = Weekend ■ = Summer

* = Services Provided

[Edit School Years](#)

- Select the 'Day Type' from the drop down menu options and enter a 'Label' to appear on the calendar. Specify the date range using the format described in the 'Note' and in the example below. Click 'Update the database'. Continue through each month in the school calendar from the first day of school to the last day of school. When all days are marked to accurately reflect the new school year calendar, continue with the next step: 'Setup ADM Reporting Periods'.

Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User

Edit Day Type 10/15/2012 [New Mail!](#)

Level	Day Type	Label
School System	Holiday	Fall Break

NOTE: To change the **Day Type** and **Label** for multiple days at once, please enter a date range in the format mm/dd/yyyy - mm/dd/yyyy. You can also enter multiple date ranges separated by a comma. If you use this feature, the day that you selected in the calendar (10/15/2012) will only be included if occurs in one of the date ranges you enter. Also note that if you add any calendar entries below (where it says "New Calendar Entries:"), they will only be added to the date 10/15/2012, not to dates in the date ranges you enter here.

10/15/12-10/19/12

Be sure to mark the Summer days with a day type of Summer. Summer days may include the last of May, June, July and beginning of August depending on the begin date of the next school year. It is important to mark the Summer days because this effects the calculation of the Projected Eligibility Date and Projected IEP Date found on the Student's Eligibility tab.

Edit Day Type 6/1/2012 [New Mail!](#)

Level	Day Type	Label
School System	Summer	

NOTE: To change the **Day Type** and **Label** for multiple days at once, please enter a date range in the format mm/dd/yyyy - mm/dd/yyyy. You can also enter multiple date ranges separated by a comma. If you use this feature, the day that you selected in the calendar (6/1/2012) will only be included if occurs in one of the date ranges you enter. Also note that if you add any calendar entries below (where it says "New Calendar Entries:"), they will only be added to the date 6/1/2012, not to dates in the date ranges you enter here.

6/1/12-7/31/12

All Summer days show as blue on the calendar.

Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User

Calendar [New Mail!](#)

Month: Jul Year: 2012

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Legend: School Day, Holiday, Teacher Inservice, Teacher Inservice, Absentee School Day, Snow Day, Weekend, Summer

Services Provided

[Edit School Years](#)

Edit ADM Report Periods

****When: Start-Up****

Once the new school year calendar is updated, it's time to setup the Basic Education Program (BEP) funding Report Periods. These report periods are used to generate Average Daily Membership (ADM) by Option of Service (ADM by Option) reports for your District.

1. Click on the Calendar icon on the main menu bar. Click the 'Edit' button in the 'Report Periods (ADM Reporting Periods)' column for the new school year.

<input type="checkbox"/>	2010-2011	07/01/2010	06/30/2011	365	260	Edit	Edit	Edit
<input type="checkbox"/>	2011-2012	07/01/2011	06/30/2012	366	261	Edit	Edit	Edit
<input type="checkbox"/>	2012-2013	07/01/2012	06/30/2013	365	259	Edit	Edit	Edit

2. To add 'ADM Report Periods' click the 'Add another reporting period' button. Click this button repeatedly until you have added nine (9) reporting periods. There are nine ADM Report Periods with twenty (20) school days each. The last ADM Reporting Period may have more or less than 20 days.

[Log Out](#) | [Main Menu](#) | [Students](#) | [My Docs](#) | [Wizards](#) | [Schools](#) | [School System](#) | [Users](#) | [Super User](#) |

Edit 2012-2013 ADM Reporting Periods Reporting Period Schedule (Tennessee Reference System)

[Add another reporting period](#)

Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User | [DS](#)

Edit 2012-2013 ADM Reporting Periods Reporting Period Schedule (Tennessee Reference System) [New Mail!](#)

Del	Reporting Period	Reporting Period Name	Begin Date	End Date	Cal Days	Sch Days
<input type="checkbox"/>	1	ADM Reporting Periods 1	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	2	ADM Reporting Periods 2	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	3	ADM Reporting Periods 3	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	4	ADM Reporting Periods 4	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	5	ADM Reporting Periods 5	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	6	ADM Reporting Periods 6	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	7	ADM Reporting Periods 7	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	8	ADM Reporting Periods 8	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	9	ADM Reporting Periods 9	<input type="text"/>	<input type="text"/>		

NOTE: If you delete a given reporting period, ALL higher numbered reporting periods will also be deleted.

3. Scroll down and click the 'Auto-fill Begin and End Dates' button. EasyIEP™ automatically calculates the number of school days in each ADM Reporting Period skipping any non-school days entered in Step 1. The ADM Reporting Periods must align with the 20 day reporting periods in EIS and your SIS package.

Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User | [DS](#)

Edit 2012-2013 ADM Reporting Periods Reporting Period Schedule (Tennessee Reference System) [New Mail!](#)

Del	Reporting Period	Reporting Period Name	Begin Date	End Date	Cal Days	Sch Days
<input type="checkbox"/>	1	ADM Reporting Periods 1	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	2	ADM Reporting Periods 2	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	3	ADM Reporting Periods 3	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	4	ADM Reporting Periods 4	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	5	ADM Reporting Periods 5	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	6	ADM Reporting Periods 6	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	7	ADM Reporting Periods 7	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	8	ADM Reporting Periods 8	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	9	ADM Reporting Periods 9	<input type="text"/>	<input type="text"/>		

NOTE: If you delete a given reporting period, ALL higher numbered reporting periods will also be deleted.

- To automatically calculate the ADM Reporting Period dates, enter the first day of school as the 'Begin Date of Period 1', specify '20' for the 'Number of Days per Period', and check the box for 'Use School (working) Days'. Click 'Update the database'.

Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User |

Edit 2012-2013 ADM Reporting Periods Reporting Period Auto Fill Options (Tennessee Reference System)

Number of Reporting Periods:	9
Begin Date of Period 1:	08/01/2012
Number of Days per Period:	20
Use School (working) Days:	<input checked="" type="checkbox"/>

Update the Database

- EasyIEP™ automatically-fills in the 'Begin Date' and 'End Date' of each period. 'Report Period 9' may have more or less than 20 days, depending on the school calendar. ADM Reporting Periods 1-8 are set to exactly 20 days for the ADM Report to generate correctly in EasyIEP™.

Log Out | Main Menu | Students | My Docs | Wizards | Schools | School System | Users | Super User |

Edit 2012-2013 ADM Reporting Periods Reporting Period Schedule (Tennessee Reference System)

Del	Reporting Period	Reporting Period Name	Begin Date	End Date	Cal Days	Sch Days
<input type="checkbox"/>	1	ADM Reporting Periods 1	08/01/2012	08/28/2012	28	20
<input type="checkbox"/>	2	ADM Reporting Periods 2	08/29/2012	09/26/2012	29	20
<input type="checkbox"/>	3	ADM Reporting Periods 3	09/27/2012	10/31/2012	35	20
<input type="checkbox"/>	4	ADM Reporting Periods 4	11/01/2012	11/30/2012	30	20
<input type="checkbox"/>	5	ADM Reporting Periods 5	12/03/2012	01/08/2013	37	20
<input type="checkbox"/>	6	ADM Reporting Periods 6	01/09/2013	02/06/2013	29	20
<input type="checkbox"/>	7	ADM Reporting Periods 7	02/07/2013	03/07/2013	29	20
<input type="checkbox"/>	8	ADM Reporting Periods 8	03/08/2013	04/12/2013	36	20
<input type="checkbox"/>	9	ADM Reporting Periods 9	04/15/2013	05/10/2013	26	20

NOTE: If you delete a given reporting period, ALL higher numbered reporting periods will also be deleted.

Update the Database

Auto-fill Begin and End Dates

Add another reporting period

Edit Progress Reporting Periods

****When: Start-Up****

1. Set up the Progress Report Periods to coordinate with your Progress Report or Report Card schedule. Click on the Calendar icon on the main menu bar. Scroll to the bottom and click on 'Edit School Years'. Click the 'Edit' button in the 'Report Periods' column for the new school year.

Edit School Years (Tennessee Reference System) [New Mail!](#)

Del	School Year	Begin Date	End Date	Cal Days	Sch Days	ESY Schedule	Report Periods	Report Periods (ADM Reporting Periods)
	1997-1998	07/01/1997	06/30/1998	365	260	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
	2004-2005	07/01/2004	09/30/2005	457	326	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	2007-2008	07/01/2007	06/30/2008	366	248	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	2008-2009	07/01/2008	06/30/2009	365	260	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	2009-2010	07/01/2009	06/30/2010	365	260	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
	2010-2011	07/01/2010	06/30/2011	365	260	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
	2011-2012	07/01/2011	06/30/2012	366	261	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	2012-2013	07/01/2012	06/30/2013	365	212	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>

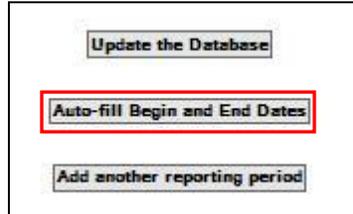
2. Click the 'Add Another Reporting Period' button until there is the correct number of reporting periods for the District.

Edit 2012-2013 Reporting Period Schedule (Tennessee Reference System) [New Mail!](#)

Del	Reporting Period	Reporting Period Name	Begin Date	End Date	Cal Days	Sch Days
<input type="checkbox"/>	1	Reporting Period 1	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	2	Reporting Period 2	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	3	Reporting Period 3	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	4	Reporting Period 4	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	5	Reporting Period 5	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	6	Reporting Period 6	<input type="text"/>	<input type="text"/>		

NOTE: If you delete a given reporting period, ALL higher numbered reporting periods will also be deleted.

3. Scroll down and click the 'Auto-fill Begin and End Dates' button or define periods by entering specific 'Begin and End Dates'. Click Update the Database button to save the report periods and update the 'Cal Days' and 'Sch Days' fields.



Edit 2012-2013 Reporting Period Auto Fill Options (Tennessee Reference System) [New Mail!](#)

Number of Reporting Periods:	6
Begin Date of Period 1:	08/01/2012
Number of Days per Period:	30
Use School (working) Days:	<input checked="" type="checkbox"/>

Update the Database

Edit 2012-2013 Reporting Period Schedule (Tennessee Reference System) [New Mail!](#)

Del	Reporting Period	Reporting Period Name	Begin Date	End Date	Cal Days	Sch Days
<input type="checkbox"/>	1	Reporting Period 1	08/01/2012	09/12/2012	43	30
<input type="checkbox"/>	2	Reporting Period 2	09/13/2012	10/31/2012	49	30
<input type="checkbox"/>	3	Reporting Period 3	11/01/2012	12/14/2012	44	30
<input type="checkbox"/>	4	Reporting Period 4	12/17/2012	02/06/2013	52	30
<input type="checkbox"/>	5	Reporting Period 5	02/07/2013	03/21/2013	43	30
<input type="checkbox"/>	6	Reporting Period 6	03/22/2013	05/10/2013	50	30

Custom Calendars

****When: Start-Up****

If your District has any schools that use a different school day calendar than the rest of the District, create a custom calendar for that school.

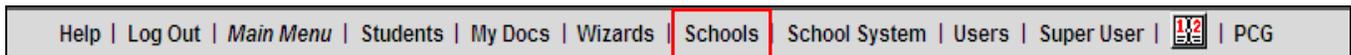
Go to the Schools tab and click on the calendar icon beside the school. Follow the same steps to add the calendar days, ADM Reporting Periods and Progress Reporting Periods.

Add, Delete, Update New Schools

****When: Start-Up****

To update EasyIEP™ in preparation for the New School Year, review the list of schools and school information, including length of school day, address, phone number, and fax number.

1. From the Main Menu page click on the Schools tab.



2. Post a message to the EasyIEP™ Message Board requesting a new school be added, deleted or updated. Provide information about the new school in your message, including:
 - School Name
 - School Code Number
 - Type of School (Elementary, Private Residential Facility, Public Separate School, etc.)
 - Length of School Day
 - Address
 - Phone Number
 - Fax Number
 - Email Address

Add new schools before adding new Students and new Users. This ensures the new schools are listed and can be assigned to Students and Users. The new schools must be added in EIS as an active school before they can be added as an active school in EasyIEP™.

Update Message-of-the-Day (MOTD)

****When: Year-End and Start-Up****

Please refer to page 12 of the Administrator Manual for detailed instructions on updating the MOTD.

Year-End Message

****When: Year-End****

We suggest that you post an end-of-year message. For example:



Here is the sample message with HTML tags included. You can simply copy and paste this paragraph to the MOTD 'Edit Message' box and edit to your liking.

```
<h1 ALIGN="center"><font color="red">Have a great Summer!</font></h1>  
<br>  
<b>  
Thank you for making this a successful School Year! Please review your caseloads and verify all  
Student records with eligibility review dates and/or IEP end dates over the Summer are completed.  
</b>
```

Welcome Back Message

****When: Start Up****

We suggest that you post a Welcome Back message. For example:

Welcome Back!

We are looking forward to another great year in 2009-2010. Please begin to review your caseloads and identify students with upcoming eligibility and IEP deadlines. Go to the "Students" page, click 'View My Caseload' and sort by 'Last Elig' or 'IEP End' by clicking on either header. Remember to check this Message of the Day for updates and news. Thanks!

Below is the sample message with HTML tags included. You can simply copy and paste this paragraph to the MOTD 'Edit Message' box and edit it to your liking.

```
<h1 ALIGN="center"> <font color="red"> Welcome Back!  
</font></h1><br><h3 ALIGN="left">We are looking forward to a new School Year. Please begin to  
review your caseloads and identify Students with upcoming eligibility and IEP deadlines. Go to the  
"Students" page, click 'View My Caseload' and sort by 'Last Elig' or 'IEP End Date' by clicking on the  
column header. Remember to check this Message of the Day for updates and news. Thanks!</h3>
```

Remove Documents on Main Page

****When: Year-End****

In addition to posting a Summer MOTD, while you're on the Main Menu page of EasyIEP™, review the list of documents posted at the bottom and delete any documents no longer needed by the District staff.

1. Scroll to the bottom of the page and select the 'Del' box next to any document that you want to delete.
2. You can also change the order of the documents in the list. Enter a '1' in the 'New Pos' field to move the document to the first position, enter a '2' to move the document to the second position, etc.

3. Click the 'Delete/Reorder Documents' button to update the page.

Files Available On-Line for Viewing/Printing:

Del	Pos	New Pos	Date Uploaded	Uploaded By	File Name
<input type="checkbox"/>			03/12/2009	Christen Hunter	Option 06: Steps to Identify and Review Student Options
<input type="checkbox"/>			02/27/2009	Christen Hunter	TN SPED Annual Conference EasyIEP Presentation
<input type="checkbox"/>			01/07/2009	Beth Carter	ECO Decision Tree for Summary Rating Discussions
<input type="checkbox"/>			01/07/2009	Beth Carter	ECO Rules for Assigning Outcome Categories
<input type="checkbox"/>			10/14/2008	Rebecca Schneider	IEP Changes V5.1 - October 2008
<input type="checkbox"/>	1		06/18/2008	Athane Keovilay	Train the Trainer V2.3
<input type="checkbox"/>	2		12/29/2008	Alicia Smith	EasyIEP Admin Manual V2.4
<input type="checkbox"/>	3		12/29/2008	Alicia Smith	EasyIEP End User Manual V2.4

Contact State Support

****When: Year-End****

This step is not required. If you want the state to know the main contact for your District during the Summer months, then follow these steps.

1. When you are finished with the year-end closeout, post a message to the EasyIEP™ Help Desk letting the Tenn. Dept. of Education know who to contact in your District over the Summer. Please also include the start date for the next school year.
2. Post a message-of-the-day to the Main Menu page of your site with your District's Summer contact information.

Year-End Reminders

Options Report:

It is important to note that your options reports may not be accurate over the Summer months. Depending on how your teachers have entered their services, a Student may or may not display an option over the Summer. Even though a Student may have an option showing over the Summer, that option is not reflected in the ADM until school starts up for the following year. Likewise, if a Student does not show an option over the Summer, the option is dependent on the services begin date for the next school year.

EasyIEP™ Training

Many Districts conduct EasyIEP™ trainings for new and returning teachers over the Summer and at the beginning of the school year. Trainers should reference the Train-the-Trainer document previously provided for suggestions and key points to emphasize during training. Please post a message to the Message Board if you would like a new test Student added to your site.

Start-Up Reminders

Weekly Conference Calls

Conference calls are usually scheduled once a month. An email notice and agenda is sent to the EasyIEP™ email distribution list. After the call, the agenda with notes is posted to the District's main page in EasyIEP™.

EasyIEP™ Help Desk and PCG Support

Contact the EasyIEP™ Help Desk at 1-888-212-3162 or post a message to the EasyIEP™ Message Board.

Student Transfers

Districts have the ability to request Student transfers through the Message Board. First, the previous school District must inactivate the Student. Please contact the previous school District to the Student inactivated and submit a request to the Message Board to transfer Student demographics, documents, and workspace information. For Districts that have a large constituency of their Student population moving to another District (for example, city vs. county schools), please contact the EasyIEP™ Help Desk for instructions on how your District may handle a mass transfer.

- Active Students cannot be transferred. Please ensure the previous District has inactivated Students before posting multiple transfer requests.
- To request an IEP transfer – include the Student's name, date of birth and previous school District
- When a Student is transferred to your District, please finalize a current IEP to create an option of service. First, update the Providers and Service Dates selected on the 'Services – Details' page. Also update the 'Goals and Objectives' details. On the Documents tab select 'IEP' document, enter the dates of the IEP currently in place, and create a new Final IEP.

Student Updates from Star

Please confirm with the Star Student Administrator an attendance record for each Student is created for the new school year. Only Student records with a complete enrollment record and attendance date are updated in EasyIEP™. Student data is transferred to EasyIEP™ every day and usually takes about two working days to fully update EasyIEP™. Please verify the Student's first name, last name and date of birth match in both Star Student and EasyIEP™. Contact the EasyIEP™ Help Desk to troubleshoot any enrollment issues.

The Student's 'First Name', 'Last Name' and 'Date of Birth' is not updated from Star Student. Changes to these data elements are corrected in EasyIEP™ by posting a message to the Message Board requesting the change. Districts continue to have access to certain fields including 'Primary Language', 'Language of Instruction', 'Length of School Day', and 'Home School'.

Student District Transfer Contact List

Please review the 'District Student Transfer Contact List' for the correct information. The current version of the 'District Student Transfer Contact List' is located on the Main page of EasyIEP™. If there are changes to the Contact information for your District, please send a message to the EasyIEP™ Message Board with the changes and the correct Contact information.

Appendix

Revisions to Manual

Summer 2012

Password Policy	New
End User License Agreement	
Tennessee EasyIEP™ Access Agreement Form	New
TEIDS Student Search	
Inactivating Pre-School and TEIDS Student Records	New
Advanced Student Search	
Student Search by Primary Option and Blank Option	New
Isolation/Restraint Tab	Addition of Isolation and Restraint data required.
Top 10 Things Administrators Need to Know	Addition of list of items to review in EasyIEP™
Flexible Listing report	Now available in TXT format for importing into Excel.
Primary/Secondary options Report	Now summarizes option data and provides a count by options.
Census Information Report	New report pulling from the Student's Census Information Section on the Eligibility tab.
State and Federal Reporting	Appendix B
End of Year/Start-up Procedures	Appendix B
Student Transfers	District Student Transfer Contact List
Student Transfers	Out of State Transfers – Suggested Guidelines

Summer 2013

Deleting Documents and Events	Revised addition
-------------------------------	------------------

Winter 2015

Student Data Imports	Added
Researching Student Import Errors	Added