



TN PULSE: 504 Manual

For Users and Administrators

Tennessee Department of Education | July 2023

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TN Pulse Logistics

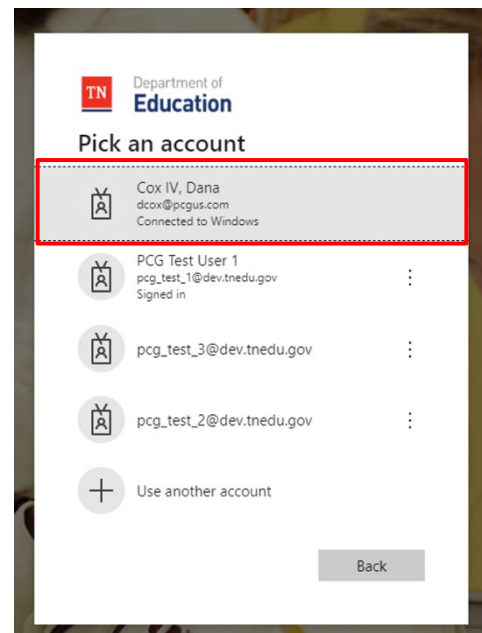
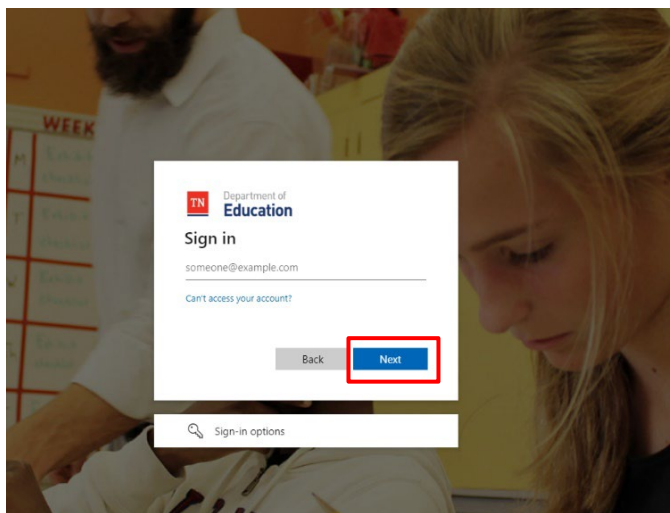
TN PULSE is the newly designed statewide data management system that offers a comprehensive platform to develop and house student learning plans. TN PULSE replaces the previously used **EdPlan or Easy IEP** portal with expanded functionality to serve as the system of record for Individual Education Program (IEP), Individual Learning Plans-Characteristics of Dyslexia (ILP-D), and Individual Learning Plans (ILP) for English learners, as well as Section 504 plans.

Logging into TN Pulse

1. Open a web browser and use the below URL for Single-Sign-On.

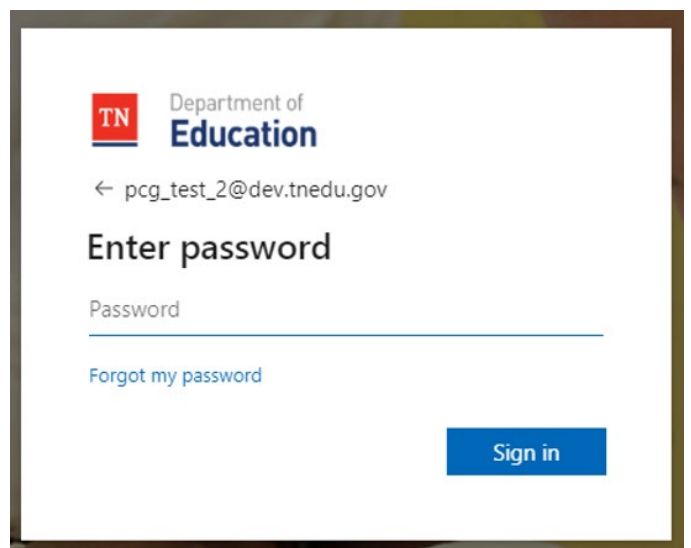
https://tnpulse.pcgeducation.com/easyiep.plx?op=openid_connect_login&OpenID_Set=1

2. When clicking the link, the user will be redirected to the TN Department of Education login. Enter your email address and click **Next** to enter your password or **Pick an Account** if there are multiple accounts available.



3. When the password is entered, the user will be logged into their district.

*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?"*



Electronic End-User Agreement

Upon initial login to TN Pulse, users must acknowledge they have read and understand the PCG End-User Agreement policy. They acknowledge this by clicking the button on the initial log-in page. If a user does not acknowledge and clicks the **Don't Agree** button, they are automatically logged out of TN Pulse.

Public Consulting Group, LLC.
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.

Tennessee Reference System ("the School System") has purchased a license to use a Public Consulting Group, LLC. ("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: BehaviorPlus™, 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.
6. This service may contain translation powered by Google. Google disclaims all warranties related to the translations, express or implied, including any warranties of accuracy, reliability, and any implied warranties of merchantability, fitness for a particular purpose and noninfringement.

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

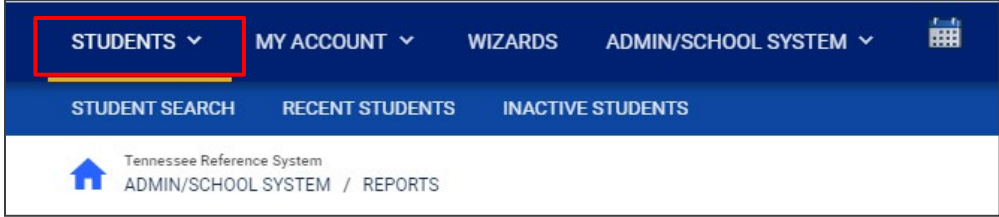
Main Menu Bar

The **Main Menu** bar is the primary menu for navigating TN PULSE. From here, users can search for students, navigate wizards which simplify more complicated tasks through a sequence of small tasks, search for previously generated documents and reports, and other admin/school system-related functions.



Students

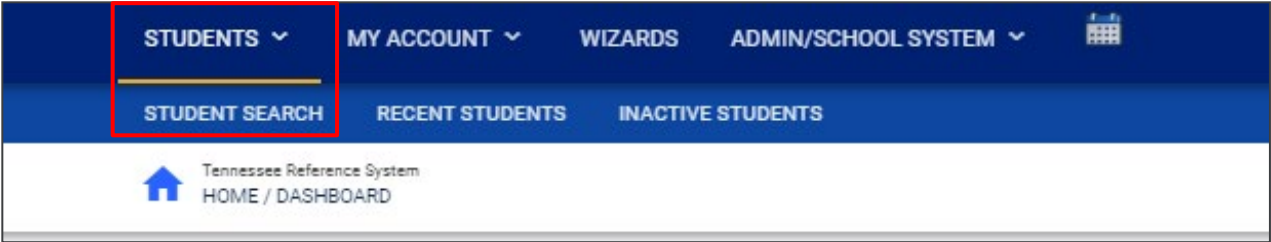
The **Students Menu** allows users to search for both recent and inactive students.



Student Search

All students are enrolled in the district's [SIS package](#) (e.g., PowerSchool, Skyward, etc.) and imported into TN PULSE. When searching for students, all students will be listed in TN PULSE. However, students who are supported by an individual learning plan will be indicated by specific **Domain Indicators** for each plan. A certain number of students appear on the screen depending on the search criteria. Narrow the search by entering the first three letters of the child's last name and selecting the **domain** check box. The student search screen will appear differently based on each user's permissions. Some users are only able to view their individual caseload.

1. From the **Main Menu** select **Student Menu** then click **Student Search**.



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

Student Criteria [VIEW MY CASELOAD](#) [ADVANCED SEARCH](#)

Student Last Name Exact Match

Student First Name Exact Match

Student Middle Name Exact Match

State ID Number Exact Match

Student ID Exact Match

Date of Birth

Grade Level

School

Only include Students where I am Case Manager

Medicaid Status

Include Inactive Students

Additional Programs

English Second Language (ESL) Parentally Placed Private School

Early Childhood Placement

Domains

IEP ISP

Section 504 ILP

ILP-D

Sort By

Open Results in a New Window

[VIEW STUDENTS](#)

3. The student's record or a list of students that meet the selected criteria will appear.
4. Selecting **View My Caseload** will display an individualized user's caseload.
5. Select the name of the student to open the student's record.

▼ Status

General Ed Child Study Referral

Evaluation Eligibility Special Ed

IEP ISP Section 504 Referral

Section 504 Eligible Section 504 Plan LEP Referral

LEP Identification LEP Plan

▼ Additional Programs

English Second Language (ESL) Parentally Placed Private School Early Childhood Placement

▼ Compliance Status

| | Compliant | Warning | Overdue |
|---|----------------------------|----------------------------|----------------------------|
| 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 type="checkbox"/> ✓ | <input type="checkbox"/> ⚠ | <input type="checkbox"/> ⚠ |
| ISP | <input type="checkbox"/> ✓ | <input type="checkbox"/> ⚠ | <input type="checkbox"/> ⚠ |
| Transfer | <input type="checkbox"/> | <input type="checkbox"/> ⚠ | <input type="checkbox"/> ⚠ |
| Section 504 Parent Consent | <input type="checkbox"/> 5 | <input type="checkbox"/> ⚠ | <input type="checkbox"/> ⚠ |
| Section 504 Eligibility | <input type="checkbox"/> 5 | <input type="checkbox"/> ⚠ | <input type="checkbox"/> ⚠ |
| Section 504 Plan | <input type="checkbox"/> 5 | <input type="checkbox"/> ⚠ | <input type="checkbox"/> ⚠ |
| ILP-D Eligibility | <input type="checkbox"/> D | <input type="checkbox"/> ⚠ | <input type="checkbox"/> ⚠ |
| ILP-D | <input type="checkbox"/> D | <input type="checkbox"/> ⚠ | <input type="checkbox"/> ⚠ |

Note: To narrow the search even further, click **Advanced Search** to filter by **Disabilities, Related Services, Additional Programs, etc.**

Each student record displays a separate column for first name, middle name, and last name. Users can sort by student first or last name. Once a user clicks on the name of the student, the student’s personal information page appears.

| Select a Student | | | | | | | | | | PRINT RESULTS | EXPORT RESULTS | SEARCH AGAIN |
|------------------|--------------|--------------|---------------|------------|-----------------|----------|---------|------------------|--------------------|---------------|----------------|--------------|
| CP ↑ | State ID ↑ | First Name ↑ | Middle Name ↑ | LastName ↑ | Date of Birth ↑ | School ↑ | Grade ↑ | Serving School ↑ | Case Manager ↑ | Domains ↑ | | |
| ✓✓ | 123456 | Benjamin | | Test | 09/28/2018 | abc | K | | Emma Test | | | |
| T ✓ | | Blake1 | | Test | 12/09/2000 | SS | 10 | | Jennifer Test Stem | IEP | | |
| ✓✓ | 161215 | Bobby | | Test | 08/01/2017 | abc | K | | Jennifer Test Stem | IEP | | |
| E ✓ | 123456711111 | Bruce | | test | 06/15/2001 | | 11 | | | | | |
| E ✓ | TESTBUG | Bug | Bunny | Test | 04/01/2014 | SS | 02 | | Jennifer Test Stem | | | |
| E ✓ | 2650676 | Calvin | David | Test | 02/08/2000 | SS | 10 | | Jennifer Test Stem | | | |
| T ✓ | 0239230 | Cam | Bell | Test | 08/03/2000 | SS | 10 | | Jennifer Test Stem | IEP | | |

Domain Indicators

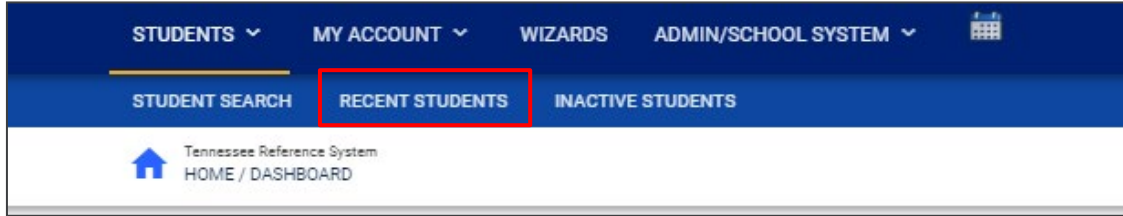
When searching for a student, the last column will provide symbols indicating a student’s current domain status. The domain indicators are listed below.

| Select a Student | | | | | | | | | | | | | PRINT RESULTS | EXPORT RESULTS | SEARCH AGAIN |
|--------------------------|---------|------------|--------------|---------------|----------|------------|--------------|---------|----------|-------------|------------|--------|----------------|----------------|--------------|
| Del ↑ | CP ↑ | LastName ↑ | First Name ↑ | Middle Name ↑ | Age ↑ | State ID ↑ | Student ID ↑ | Grade ↑ | School ↑ | Last Elig ↑ | Last IEP ↑ | Dis ↑ | Case Manager ↑ | Domains ↓ | |
| <input type="checkbox"/> | ST ✓✓ | Test | Alicia | Bagelly | 15 Years | ABT8334 | ABT8334 | 11 | SS | 01/01/2021 | 07/23/2013 | SLD | | IEP 504 | |
| <input type="checkbox"/> | ST L ✓✓ | Test | Amanda | | 9 Years | 0000001 | 0000001 | 03 | ES | 03/01/2023 | 04/21/2023 | SI,TBI | | ILP-D 504 | |
| <input type="checkbox"/> | T ST ✓✓ | Test | Andy | Notebook | 19 Years | ABC1230 | ABC1230 | | | 12/08/2016 | 12/08/2016 | LI | | IEP ISP | |
| <input type="checkbox"/> | ✓✓ | Test | Alice | | 14 Years | 33333332 | 3445322 | 09 | abc | 03/27/2023 | 08/07/2019 | SLD | | IEP ILP-D | |
| <input type="checkbox"/> | T ✓✓ | Test | Angela | | 17 Years | TEST09876 | TEST09876 | 08 | TEST | 01/17/2019 | 08/07/2019 | SLD | | IEP ILP | |

| Symbol | Description |
|--------|---------------------------------|
| IEP | Students with an IEP |
| ISP | Students with an ISP |
| 504 | Student with a Section 504 Plan |
| ILP-D | Students with an ILP-D |
| ILP | Students with an ILP |

Recent Students

The **Recent Students** section will list students a user has recently searched for via **Student Search**.

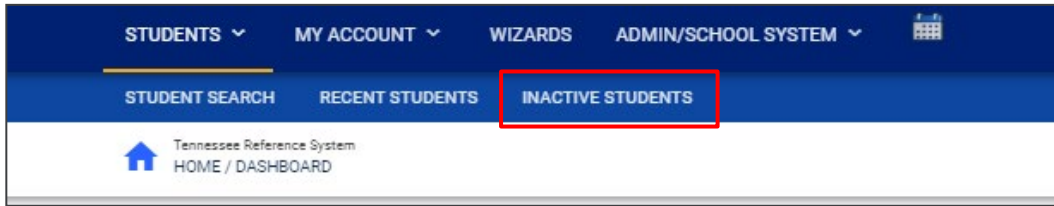


Select a Student [PRINT RESULTS](#) [EXPORT RESULTS](#) [SEARCH AGAIN](#)

| Last Accessed | CP | State ID | First Name | Middle Name | LastName | Date of Birth | School | Grade | Serving School | Case Manager | Domains |
|---------------------|--------|----------|------------|-------------|----------|---------------|--------|-------|----------------|-----------------|---------|
| 06/19/2023 14:18:02 | ✓ 5 | 33333332 | Alice | | Test | 09/02/2008 | abc | 09 | | Emma Test | IEP |
| 06/19/2023 13:18:48 | ✓ 6T L | 0000001 | Amanda | | Test | 03/01/2014 | ES | 03 | | Jennifer Briggs | IEP 504 |
| 06/19/2023 13:04:38 | ⚠ 5 | | Denise | | Test | 05/01/2008 | SS | 04 | | Emma Test | |
| 06/19/2023 13:04:08 | ⚠ ✓ | 123456 | Benjamin | | Test | 09/28/2018 | abc | K | | Emma Test | |

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Inactive Students



For users with the appropriate access and permissions to search for inactive students, click the **Inactive Students** tab from the **Students Menu**. This search allows users to search by **Last Name**, **Date of Birth**, **Student or State ID Number**, **Exit Reason**, and **Dates Exited**. To search exact wording, select the checkbox next to **Exact Match**. Click **View Inactive Students** to view a list of inactive students who meet the criteria provided.

Last School Attended:

Student Last Name: Exact Match

Student First Name: Exact Match

Student Middle Name: Exact Match

Date of Birth:

Student ID: Exact Match

State ID Number: Exact Match

Students Exited After:

Students Exited Before:

Exit Reason:

Sort List By:

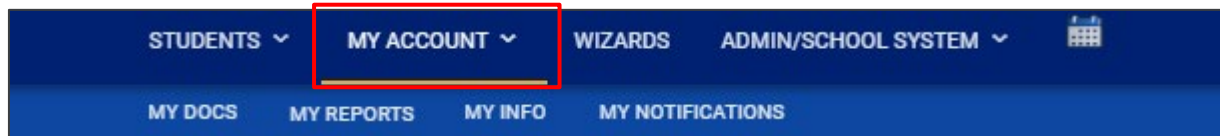
[VIEW INACTIVE STUDENTS](#)

Select a student by clicking on the student's name to be directed to his/her **Documents** page.

| Student ID | State ID Number | Name | Date of Birth | School | Date Exited | Reason for Exiting |
|----------------|-----------------|-------------------------------------|---------------|--------|-------------|--------------------------------|
| TESTSTUDENT164 | T164 | Abigail Rider Test | 01/20/2004 | SS | 06/22/2021 | Moved, Known to be Continuing |
| TEST123498 | TEST123498 | Activestudent2 Test | 01/01/1995 | abc | 10/25/2017 | Graduated with Regular Diploma |
| TESTTRAINING14 | TestTraining14 | Alex 504 Test | 02/18/2003 | TEST | 06/13/2017 | Graduated with Regular Diploma |
| AJT7777 | A77 | Alex John Test | 10/01/2011 | SS | 06/22/2021 | Moved, Known to be Continuing |
| 909787867 | 909787867 | Barrett 2-Dec Test | 08/06/2006 | TEST | 12/08/2017 | Moved, Known to be Continuing |

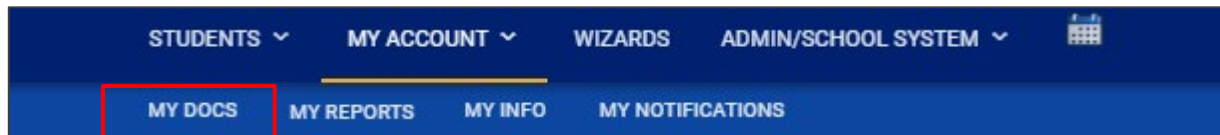
My Account

The **My Account** menu allows users to review documents, reports, account information, and notifications.



My Docs

The **My Docs** tab displays the Case Manager's student's documents. This tab allows Case Managers to view and print all documents for students on their caseload.

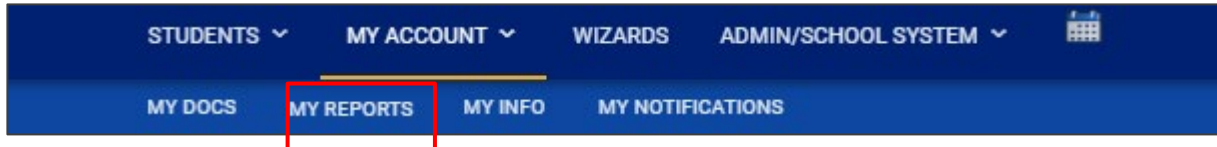


The **My Docs** tab lists all documents the Case Manager has created for the student or those previously created by someone else within the past year, including draft documents that have not expired, or a subset of those documents if the search page was used or if coming to this section from the **Progress Report Wizard**. This page appears immediately after running the **Progress Report Wizard** and can always be accessed using the **My Docs** tab in the menu above. To print a document, click **Document Type** in the list, then use the **printer** icon that appears in the toolbar directly above the document itself. To print documents in a batch, use the checkboxes to select individual documents or click **Check All** to select all documents listed.

| Date Created | Created By | Student | Batch | Document | Year / Report Pd | Status |
|--------------|----------------|---------------|-------------------------------------|---|------------------|----------|
| 06/18/2023 | Emma Test | Denise Test | <input checked="" type="checkbox"/> | Section 504 Eligibility Report | PDF | Accepted |
| 06/17/2023 | Emma Gonsalves | Benjamin Test | <input type="checkbox"/> | Timeline Extension Report (New) | PDF | (Draft) |
| 06/17/2023 | Emma Gonsalves | Benjamin Test | <input checked="" type="checkbox"/> | Timeline Extension Report (New) | PDF | Proposed |
| 06/17/2023 | Emma Test | Denise Test | <input type="checkbox"/> | Eligibility Report - Eligible | PDF | Accepted |
| 06/16/2023 | Emma Test | Denise Test | <input checked="" type="checkbox"/> | Timeline Extension Report (New) | PDF | (Draft) |
| 06/16/2023 | Emma Test | Denise Test | <input type="checkbox"/> | Invitation to Meeting | PDF | (Draft) |
| 06/16/2023 | Emma Test | Denise Test | <input type="checkbox"/> | Consent for Initial Assessment | PDF | |

My Reports

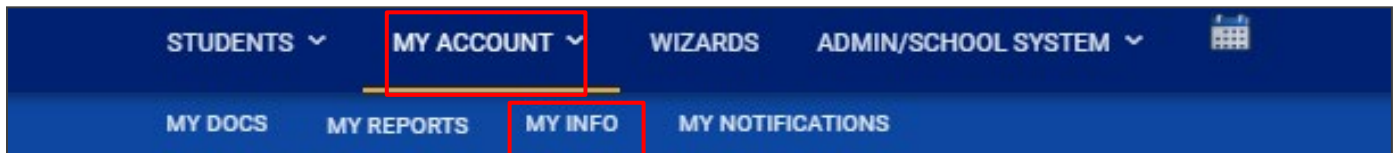
The **My Reports** tab lists all of the reports a 504 Team member has created for the student or those previously created by someone else within the past year including draft documents that have not expired



| Report | Date Created | Created By | System | School | User |
|--|---------------------|---------------|--------|--------|------|
| Personnel Report Table 2 Details (PDF) | 04/30/2023 23:32:00 | Jennifer Stem | Yes | | |
| Personnel Report Table 2 Details (XLS) | 04/30/2023 23:32:00 | Jennifer Stem | Yes | | |
| Personnel Report Table 2 Details (XLS) | 04/30/2023 23:22:00 | Jennifer Stem | Yes | | |
| Personnel Report Table 2 Details (PDF) | 04/30/2023 23:21:00 | Jennifer Stem | Yes | | |
| Contacts Report (XLS) | 03/23/2023 14:05:00 | Jennifer Stem | Yes | | |
| Accommodations Report (PDF) | 12/10/2022 10:25:00 | Jody Hughes | Yes | | |

My Info

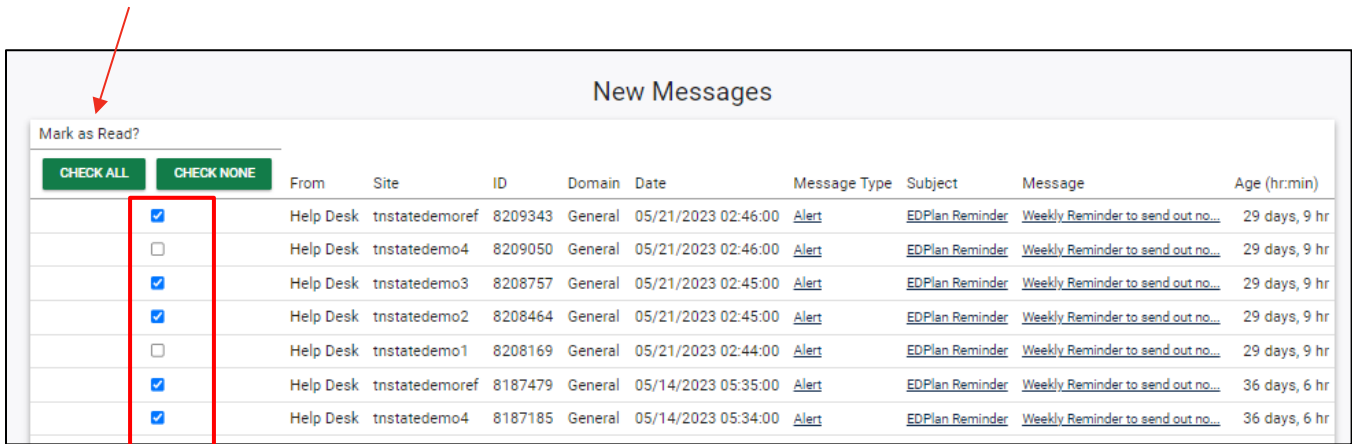
The **My Info** tab allows users to view their demographic information. Click **My Account** from the **Main Menu** bar, then select **My Info**.



| |
|---|
| Name: Anna Test |
| User Code: 339540 |
| Title: SPED Teacher |
| Address: |
| City, State, ZipCode: |
| Home Phone: |
| Work Phone: |
| E-Mail Address: Anna.Santaniello@mnps.org |

My Notifications

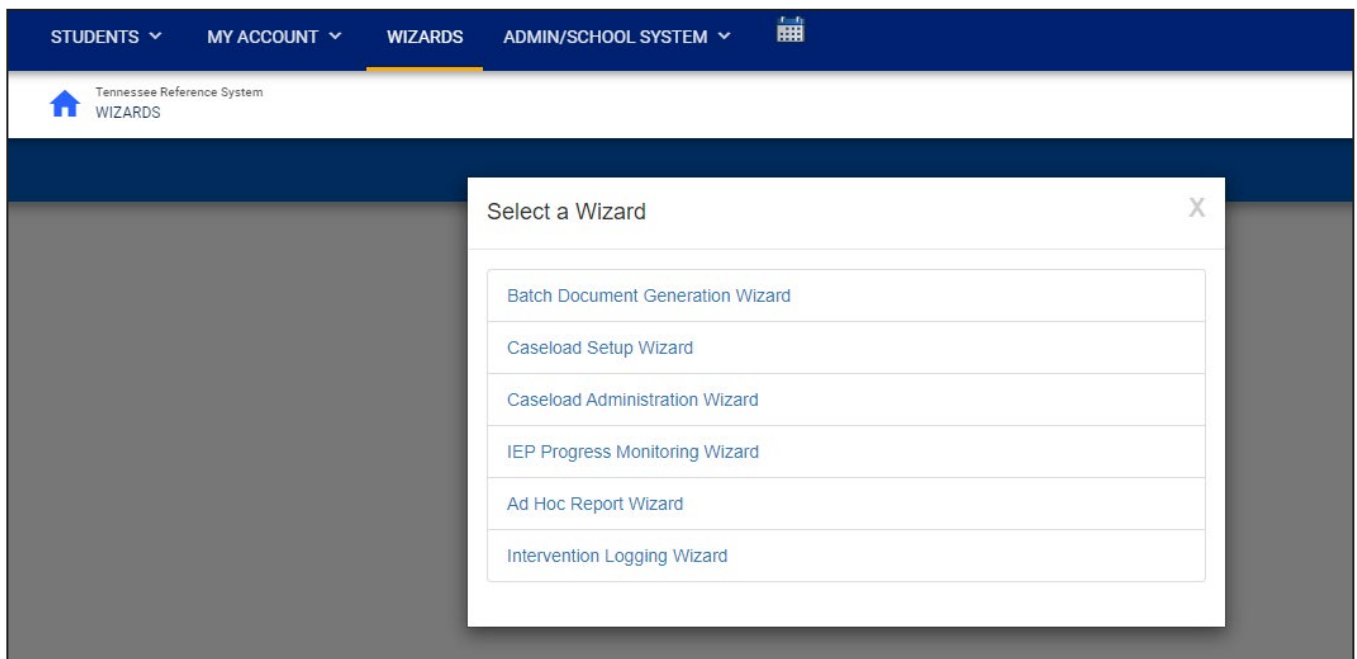
The My Notifications tab displays all notifications pertaining to students such as alerts, weekly reminders, overdue compliance alerts etc. If the user has unread messages, a **New Messages** section will appear at the top of the page. Below any new messages, a **Previous Messages** section will display all messages the user has previously sent or received. To mark messages as read, click each checkbox individually or select **Check All**.



| New Messages | | | | | | | | | | | |
|-------------------------------------|-----------|-------------------------------------|---------|---------|---------------------|--------------|-----------------|-----------------------------------|---------------|--|--|
| Mark as Read? | | | | | | | | | | | |
| <input type="checkbox"/> CHECK ALL | | <input type="checkbox"/> CHECK NONE | | | | | | | | | |
| | From | Site | ID | Domain | Date | Message Type | Subject | Message | Age (hr:min) | | |
| <input checked="" type="checkbox"/> | Help Desk | tnstatedemoref | 8209343 | General | 05/21/2023 02:46:00 | Alert | EDPlan Reminder | Weekly Reminder to send out no... | 29 days, 9 hr | | |
| <input type="checkbox"/> | Help Desk | tnstatedemo4 | 8209050 | General | 05/21/2023 02:46:00 | Alert | EDPlan Reminder | Weekly Reminder to send out no... | 29 days, 9 hr | | |
| <input checked="" type="checkbox"/> | Help Desk | tnstatedemo3 | 8208757 | General | 05/21/2023 02:45:00 | Alert | EDPlan Reminder | Weekly Reminder to send out no... | 29 days, 9 hr | | |
| <input checked="" type="checkbox"/> | Help Desk | tnstatedemo2 | 8208464 | General | 05/21/2023 02:45:00 | Alert | EDPlan Reminder | Weekly Reminder to send out no... | 29 days, 9 hr | | |
| <input type="checkbox"/> | Help Desk | tnstatedemo1 | 8208169 | General | 05/21/2023 02:44:00 | Alert | EDPlan Reminder | Weekly Reminder to send out no... | 29 days, 9 hr | | |
| <input checked="" type="checkbox"/> | Help Desk | tnstatedemoref | 8187479 | General | 05/14/2023 05:35:00 | Alert | EDPlan Reminder | Weekly Reminder to send out no... | 36 days, 6 hr | | |
| <input checked="" type="checkbox"/> | Help Desk | tnstatedemo4 | 8187185 | General | 05/14/2023 05:34:00 | Alert | EDPlan Reminder | Weekly Reminder to send out no... | 36 days, 6 hr | | |

Wizards

The **Wizards Menu** will direct users to a list of Wizards, or a set of simplified, sequential controls for guiding users through a complex task, offered within TN Pulse. Depending on the user's permissions, this list may vary. A few examples are shown below. Additional user guides will be provided with details on the Wizard functionality.



STUDENTS ▾ MY ACCOUNT ▾ WIZARDS ADMIN/SCHOOL SYSTEM ▾

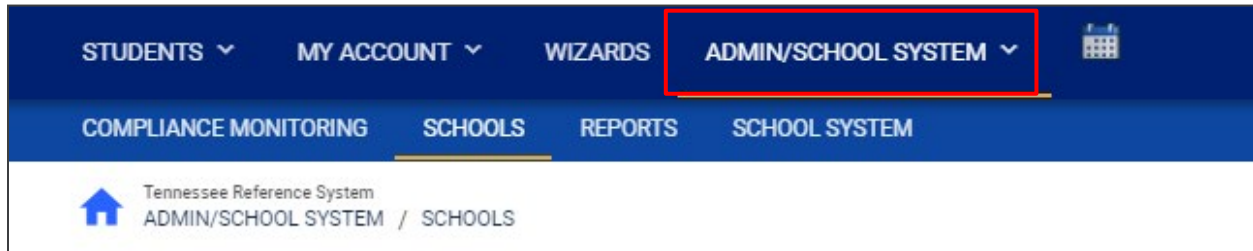
Tennessee Reference System
WIZARDS

Select a Wizard

- Batch Document Generation Wizard
- Caseload Setup Wizard
- Caseload Administration Wizard
- IEP Progress Monitoring Wizard
- Ad Hoc Report Wizard
- Intervention Logging Wizard

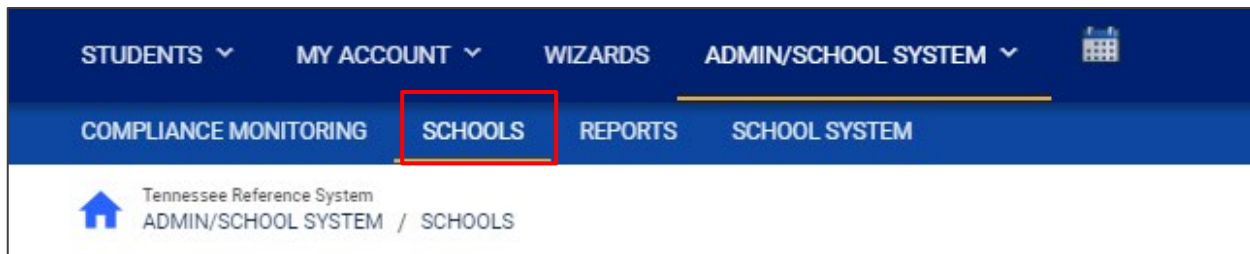
Admin/School System

The **Admin/School System Menu** allows users to view, edit and manage areas of TN Pulse from an administrator viewpoint, including student transfers, managing school information across the district, reporting, managing users, compliance monitoring, etc.



Schools

The **Schools** tab allows users to view individual school information for schools within the district.



Users can view school information by clicking on an individual school name or the **pencil** icon under **Details**. This will open a new window. Click **View School Changes** to enter the criteria for the school changes entered in the system.

A screenshot of a 'Sample School Details' form. The form is white with a light blue header. The title 'Sample School Details' is on the left, and a blue link 'VIEW SCHOOL CHANGES' is on the right. The form contains several fields: 'School Name' with the value 'Sample School', 'Abbreviation' with the value 'SS', a checkbox for 'External School' which is unchecked, 'School Code' with the value 'SS', and 'Type of School' with a dropdown menu showing 'Elementary'. A red box highlights the right edge of the form.

Schools

Schools (4) External Schools (1)

Search: _____

| CP | School Name | Abbrev | Code | Address | City, State Zip | Phone | Fax | Email | Details |
|----|-------------------|--------|------|------------------|-----------------|--------------|--------------|---------------|---------|
| | abc & test school | abc | 1234 | 1111 test circle | tester, TN | | | | |
| | New School | NS | | | | 615-555-1234 | | | |
| | Sample School | SS | SS | 123 Any Street | Any Town, TN | 555-555-5555 | 555-555-5556 | test@test.com | |
| | Test School | TEST | TEST | | | | | | |

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School System

The **School System** tab allows users to view information on their designated school district. This information is **view only** depending on the user's permissions. School contact information is also listed here.

STUDENTS ▾ MY ACCOUNT ▾ WIZARDS ADMIN/SCHOOL SYSTEM ▾

COMPLIANCE MONITORING SCHOOLS REPORTS **SCHOOL SYSTEM**

Tennessee Reference System
ADMIN/SCHOOL SYSTEM / SCHOOLS

Tennessee Reference System
ADMIN/SCHOOL SYSTEM / SCHOOL SYSTEM

Tennessee Reference System

School System Name: Tennessee Reference System
 School Year: 2022-2023
 School System Code: tnref0001
 Address: 710 James Robertson Parkway
 City: Nashville
 State: TN
 Zip Code: 37243
 Phone Number: 777-777-7777
 Fax Number:
 E-Mail Address:
 Time Zone: US/Eastern (GMT -05:00)

Uploaded Documents Quota (in bytes): 2147483647 (2048.00 MB)
 Bytes Uploaded this Month: 0

Reports

The **Reports** tab lists any **Drill-Down Reports**, **Scheduled Reports**, and **Saved System Reports** that have been generated or will be generated within the district.

The screenshot displays the 'Reports' section of a software interface. It is divided into three main areas:

- Drill-Down Reports:** This section is currently empty, with 'Student Reports' and 'User Reports' both showing '(None Available)'. Below this, 'Service Reports' and 'Service Log Reports' are also shown as '(None Available)', with a link for 'Service Log Report'.
- Scheduled Reports:** A list of reports with links to view them:
 - Monthly Documentation Report (.xls)
 - Printable Submission Log
 - Printable Service Report
 - Service Log Report (.xls)
- Saved System Reports:** A table listing generated reports with columns for Date Generated, Created By, Report Type, Expiration Date, and Custom Name.

| Date Generated | Created By | Report Type | Expiration Date | Custom Name |
|---------------------|----------------|---------------------------------------|-----------------|----------------------------|
| 04/30/2023 23:32:00 | Jennifer Stem | Personal Report Table 2 Details (PDF) | 08/28/2023 | |
| 04/30/2023 23:32:00 | Jennifer Stem | Personal Report Table 2 Details (XLS) | 08/28/2023 | |
| 04/30/2023 23:22:00 | Jennifer Stem | Personal Report Table 2 Details (XLS) | 08/28/2023 | |
| 04/30/2023 23:21:00 | Jennifer Stem | Personal Report Table 2 Details (PDF) | 08/28/2023 | |
| 03/23/2023 14:05:00 | Jennifer Stem | Contacts Report (XLS) | 07/21/2023 | |
| 12/16/2022 10:25:00 | Jody Hughes | Accommodations Report (PDF) | | |
| 12/01/2022 11:12:00 | Jennifer Stem | THHS Combined Table 1&2 Details XLS | | |
| 03/15/2019 16:56:00 | Prianta Mishra | Accommodations Report TH (PDF) | | before change |
| 03/08/2019 17:30:00 | Samantha Law | User Access Data (xls) | | Sped Conference |
| 03/08/2019 17:29:00 | Samantha Law | Report Links (xls) | | Sped Conference |
| 03/08/2019 17:22:00 | Samantha Law | User Access Assessment Report (xls) | | Sped Conference |
| 02/08/2012 17:20:00 | Prianta Mishra | Accommodations Report TH (xls) | | Prianta EasyIEP University |

Note: Although this feature is not available on all reports, **Drill Down Reports** allow users to manipulate data from a comprehensive view to a more detailed view.

Dashboard

The **TN PULSE Dashboard** contains widgets which will display a subset of information on students with individual learning plans (i.e., IEP, ILP, ILP-D, etc.) in TN PULSE throughout the district. The dashboard widgets will change depending on a user's role within the district and their associated permissions. Examples of widgets are displayed below. The information button ("I" icon) on each widget defines the data that is displayed.

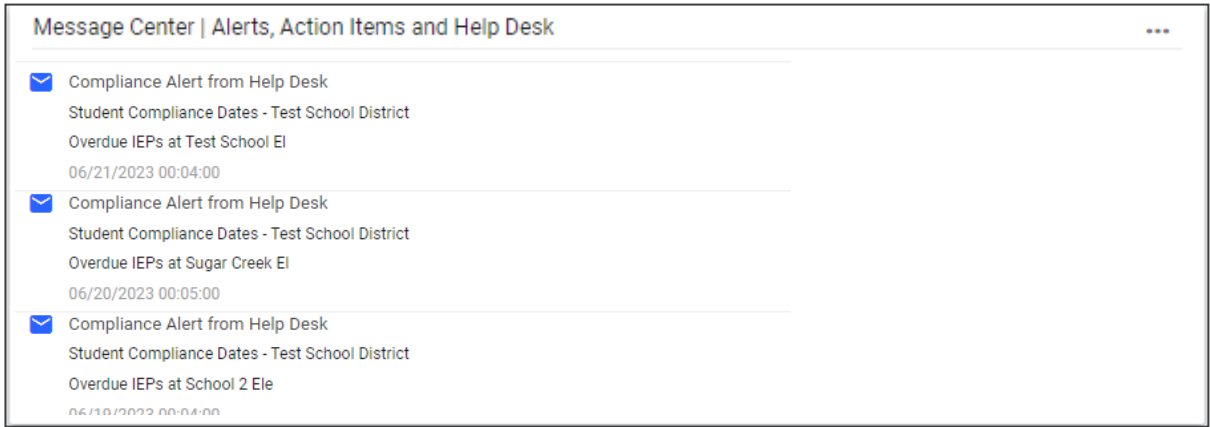
The screenshot shows the 'TN PULSE' dashboard interface. At the top, there are navigation tabs for 'STUDENTS', 'MY ACCOUNT', 'WIZARDS', and 'ADMIN/SCHOOL SYSTEM'. The main content area includes several widgets:

- Message Center:** Alerts, Action Items and Help Desk. Shows 'You Have No New Messages'.
- My Students (41 Students):** A list of students with checkmarks and names: Caden 504 Test, Carlos 504 Test, Connect Test, Everett 504 Test, Sakshini Thanigavelan, and Isaac Trejo Torres.
- My Calendar:** A calendar view for May, June, and July 2023. The current date is June 20th.
- My Reports:** Shows 'You Have No Reports'.
- Students by Special Education Disability - Federal (27 Total Students):** A bar chart showing the number of students for different disability categories:

| Disability Category | Number of Students |
|---------------------|--------------------|
| AUT | 10 |
| DD | 3 |
| EMR | 1 |
| ID | 5 |
| SUC | 8 |
| SU | 8 |
- Announcements:** A list of system updates and notices, including information about the EDPlan system maintenance and the EasyIEP conference call.

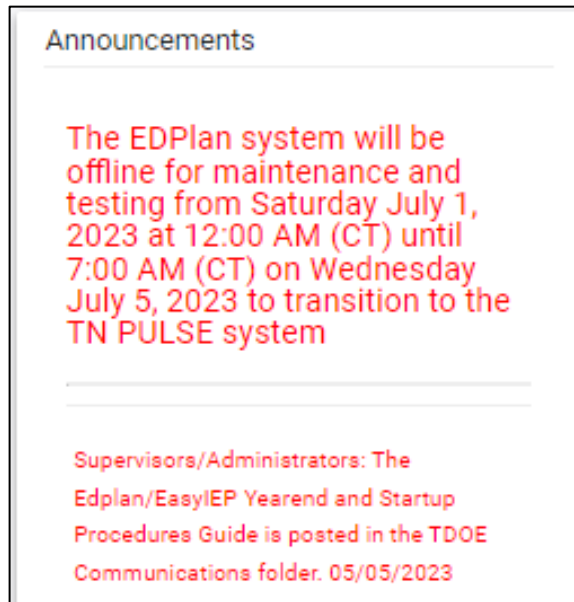
Message Center

The **Message Center** widget lists current messages, alerts, and action items for the user to view upon sign-in. These messages may include alerts regarding overdue IEPs, compliance alerts, and other announcements pertinent to students assigned to the user's caseload.



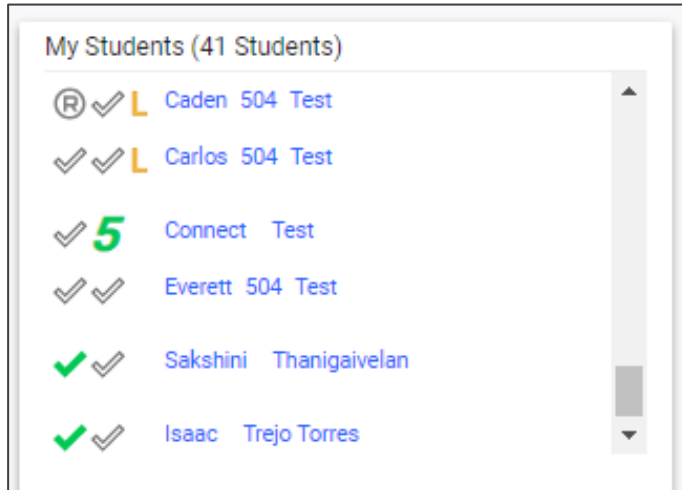
Announcements

The **Announcements** widget displays current announcements.



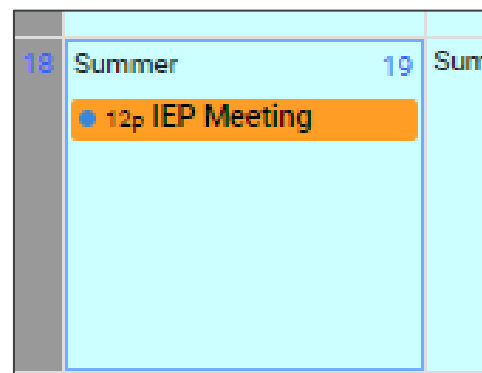
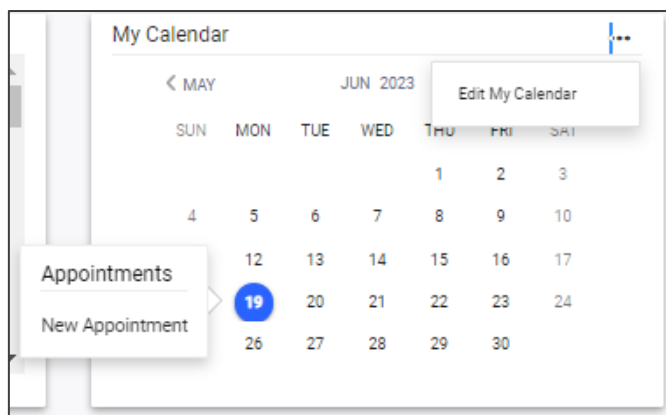
My Students

The **My Students** widget lists students assigned to a user's caseload along with compliance symbols. Click the name of the student to navigate to the student's page.



My Calendar

The **My Calendar** widget displays the calendar for the current month and day. To view appointments or add a new appointment, click on a date and choose **New Appointment**. A new window will appear. Enter details regarding the new appointment including the category, colored label, start and end time, etc. Click **Save** when complete. The new appointment will now be displayed on the calendar.



Add Calendar Event

Event Type

Calendar Entry
 Reserved Time
 Service

Calendar Entry Details

Provide a unique name and select the start and end times for your calendar event. Category, Label, Location, and Description are optional fields to provide more detail and/or organize calendar events. If needed, you may add another user to your event by searching under Add Additional Users and selecting their name. Please use at least the first letter of first and last name when searching. Note that only users whose calendars you have permission to edit will populate as options to add to the event.

Entry Name:
 Category:
 Label:

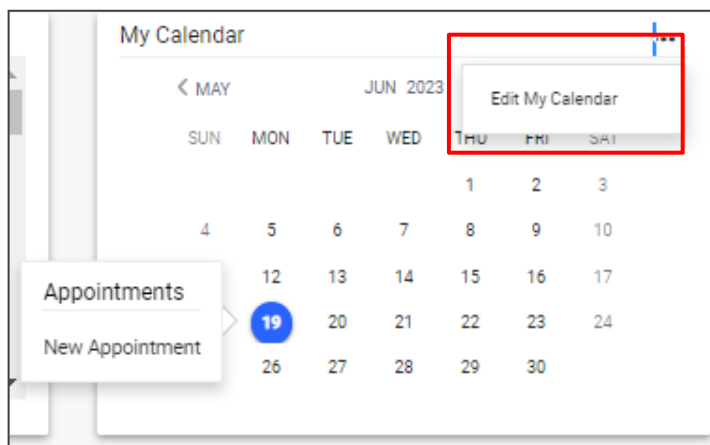
Entry Date:
 Start Time:
 End Time:
 All Day?

Location:

Description:

SAVE

To edit the calendar, click the **3 dots** in the upper right-hand corner and select **Edit My Calendar**.



To create a calendar event or schedule services, click on a day and select the **Event Type**. Enter necessary details and click **Save** to create your event or series. The five icons in the corner offer the functionalities listed below:



Print calendar



Edit preferences and settings



Filter calendar entries by color, service, or school

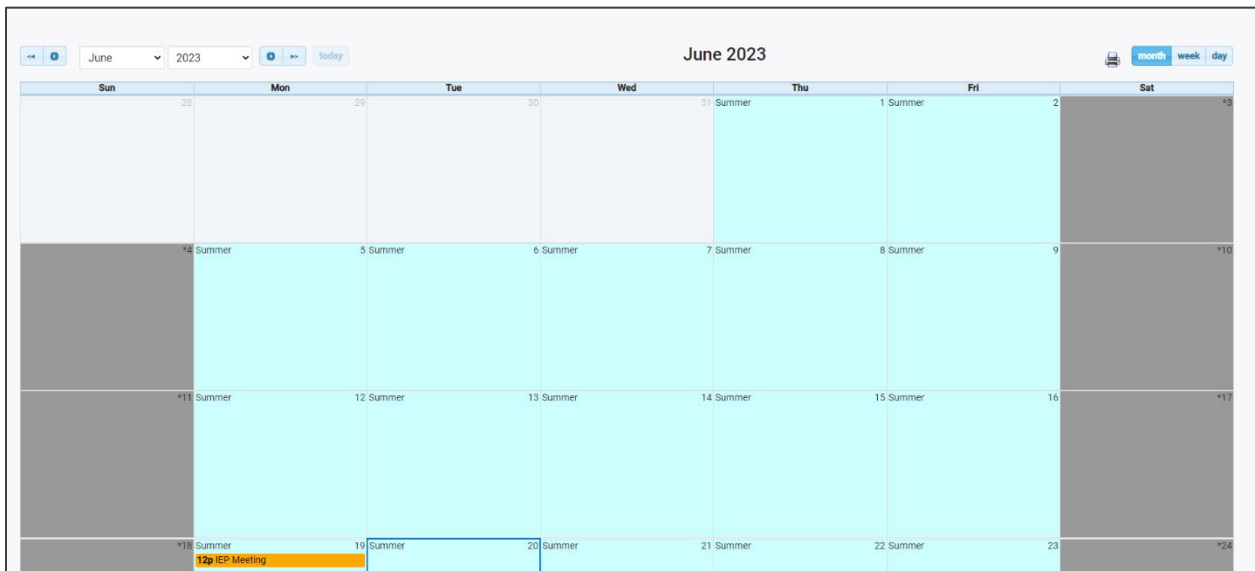


View all services in a separate window



Import/ Export

Note: Click the **calendar** icon on the **Main Menu** bar to access the school system calendar. This will display the schoolwide calendar, including events, teacher workdays, holidays, and other important dates. A **Calendar Legend** is provided at the bottom right of the calendar for reference.

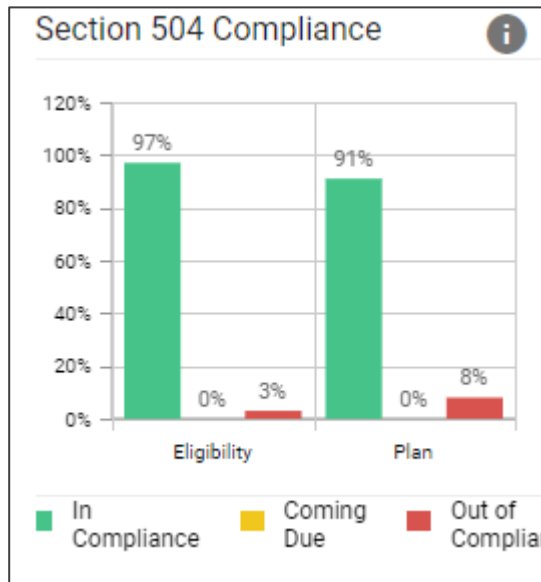


Calendar Legend:

- = Current Date
- = Holiday
- = Teacher Inservice
- = Snow Day
- = Summer
- = * School Day
- = Teacher Workday
- = * Abbreviated School Day
- = * Weekend
- = * Services Provided

Section 504 Compliance

The **Section 504 Compliance** widget shows all data related to 504. The widget will display or hide based on the user's permission. By default, it will display three bars for each section, including **504 Accommodation Plan** and **Eligibility**. One bar represents the total percent of students in the state who are compliant, while one bar represents the total percent of students who have a due date coming in the next 30 days. The last bar represents the total percentage of students who are past the due date for the event in the given section. Clicking the **Information** button will display more details regarding the color code meanings for 504 compliance.

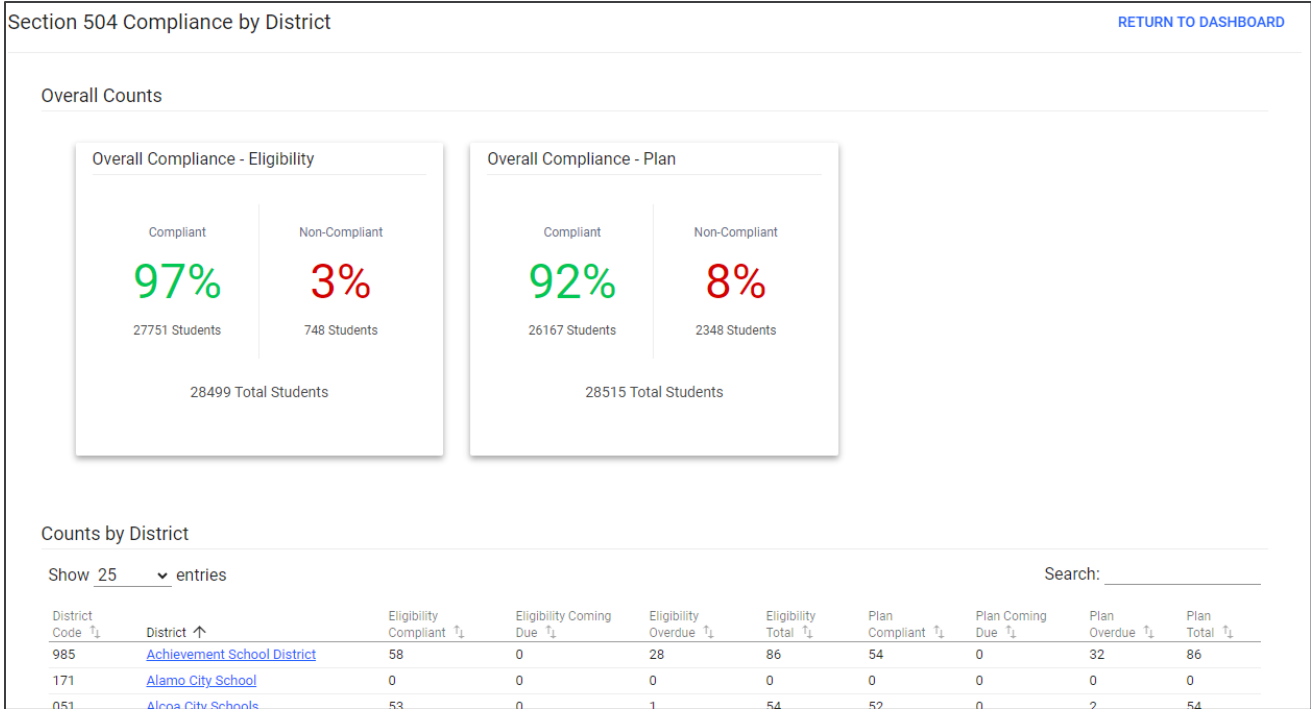


Section 504 Compliance [X]

Information contained in each of the columns include an unduplicated count of students served by a Section 504 plan who fall within the following categories:

- Students are currently within all timelines.
- Students are within 30 days of a timeline due date.
- Students have a timeline that is overdue by at least one day.

Clicking any bar will open the **504 Compliance by District** page displaying a breakdown of students by district in each compliance status category. From that page, the user can navigate to the district site by clicking the district name.



Resource Library

At the bottom of the **Main Menu** page, various documents are available to users in the **Resource Library** widget for viewing or downloading. View a document by selecting the name of the document indicated by a blue hyperlink. If desired, documents can be saved to an individual computer when opened.

Resource Library [SAVE](#) ⋮

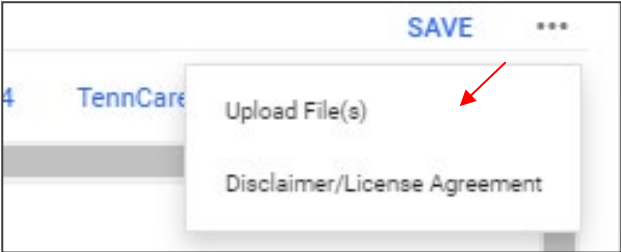
[TDOE Communication](#)
 [EasyIEP](#)
 [Webinar Recordings](#)
 [Early Childhood](#)
 [504](#)
 [TennCare](#)
 [TDOE IEP Monitoring Tool](#)

| Del | Pos | File Type Category | Date Uploaded | Uploaded By | File Name |
|--------------------------|-----|--------------------|---------------|---------------|--|
| <input type="checkbox"/> | 3 | TDC | 05/05/2023 | Sheryn Ordway | TN_EDPlan_YearEnd_Guide_and_Startup_Procedure_Manual_May_2023.docx |
| <input type="checkbox"/> | 5 | TDC | 04/17/2023 | Sheryn Ordway | EasyIEP_District_Conference_Call_20230419_FINAL.docx |
| <input type="checkbox"/> | 8 | TDC | 03/21/2023 | Sheryn Ordway | EasyIEP_District_Conference_Call_20230322_Final.docx |

The documents and reports are divided into folders in the **Resource Library** widget. All memos and procedural documents from the Tennessee Department of Education, along with documents and manuals related to the use of TN Pulse will be displayed here. Districts may upload documents for their specific

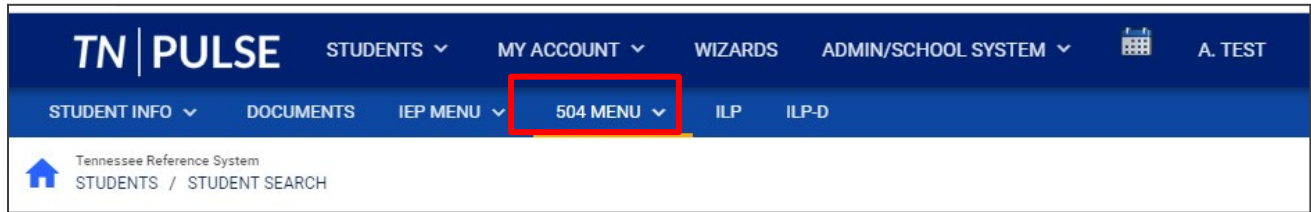
district in the **District Documents** folder. If the district has purchased additional applications from PCG, more folders will be available. Documents commonly uploaded to this widget include TN Pulse User Manuals, district-specific forms, Behavior Intervention Plan forms, Functional Behavior Assessment forms, etc.

Click the **three dots** in the corner of the widget. Select **Upload File(s)** to locate the file on the computer or network. After a file is located, click the **Upload File(s)** button at the bottom of the screen.

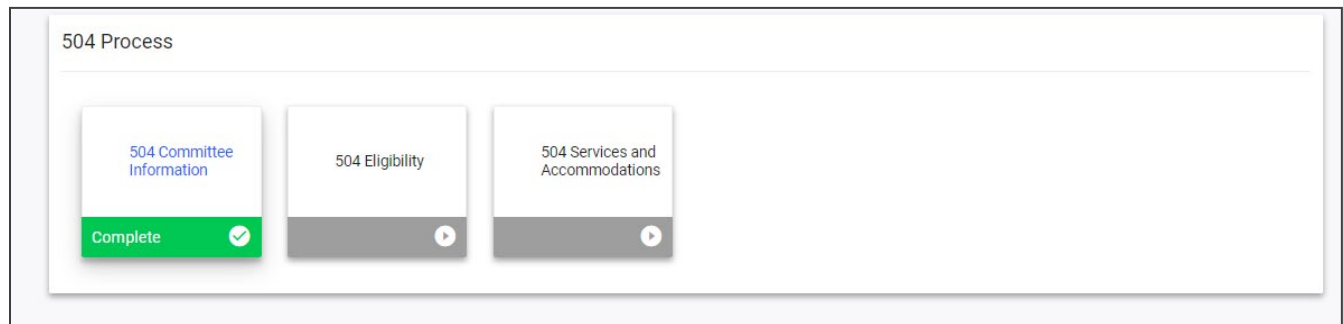


504 Process

Once a student is chosen via the **Student Menu**, users will select **504 Process** from the blue student menu.



On this page, users will see the primary navigation menu for **504**. The **504 Committee Information, 504 Eligibility, and 504 Services and Accommodations** tiles allow users to navigate to the page of TN Pulse 504 they wish to edit. TN Pulse 504 is process-driven, meaning that once a section is completed, the user will be directed to the next.

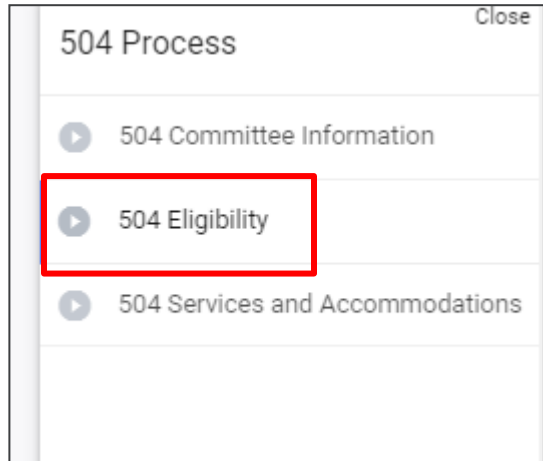


Navigating 504

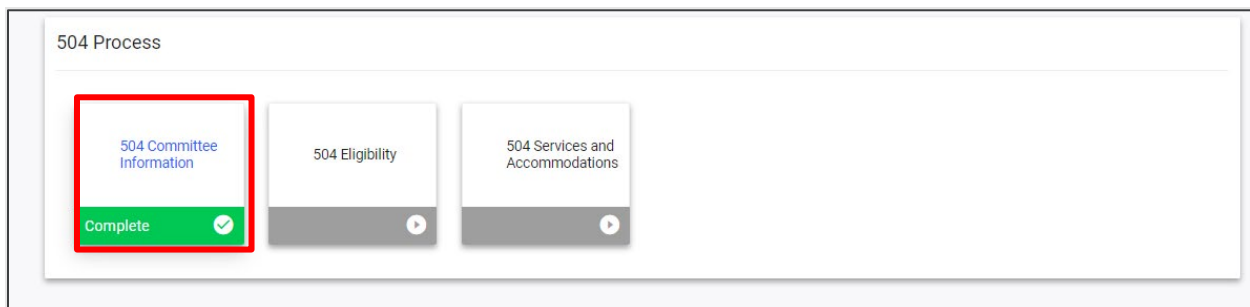
There are multiple ways to navigate between the pages within the 504 process. In the top right corner of the screen, near the student's name, there are two arrows. The **orange arrow** will direct users back to the previous page in the process. The **green arrow** will save what users have entered on the page and then direct them forward in the process. If any required fields are missing, users will be kept on the current page and an error message will direct them to the missing fields. The **blue PDF button**, also known as **Show Section**, will show a preview of the **Draft 504 Document** in PDF format. The **blue Language button** will show a preview of the 504 Document in PDF format in another language if the student has another language selected for their **Document Language**.



Another way to navigate the IEP/ISP pages is to utilize the **blue arrow** on the right side of the screen. Click the **blue arrow** for a list of pages to appear. Select the page(s) to navigate to a different part of the process.



504 Committee Information



The **504 Committee Information** page allows users to select the **504 Team**, add or view details for Parents/Guardians, view or update student information, create documents, confirm consent events, and view previously generated documents.

Section 504 Team

The **Section 504 Team** page is used to add the Committee Chairperson, parents, guardians, and other important people inside and outside the school district who may need to be involved in the student's 504 service plan. To add a **Committee Chairperson**, select a name from the dropdown menu and click **Save**. Once saved, click **Select Section 504 Team** in the right-hand corner to add additional team members.

Section504 Team SELECT SECTION504 TEAM

Committee Chairperson
Test, Laura

| Name | Relationship |
|------------------|--------------|
| Mom and Pop Test | Both Parents |

SAVE

A pop-up will display allowing users to select parents, staff members at the school, and staff members within the district who can access 504 information, forming the **Section504 Team**. Once an option is selected, click **Save**.

*Note: The parents will auto-populate from the **Team/Parents** section of the student's profile.*

Select Section504 Team ✕

i Note: To include someone on this Student's Section504 Team who is not a user in this system, you will need to first add that person on the "Parents" page, which allows adding other persons besides parents, e.g. a Student's doctor, other family members, etc.

Committee Chairperson
Test, Jennifer

Parents, etc. who will receive Section504 Information

| Select | Parent Name(s) | Relationship |
|--------------------------|----------------|--------------|
| <input type="checkbox"/> | David | Father |
| <input type="checkbox"/> | Russ/Lori | Grandparent |

Other Users at Warren County Middle School who can access Section504 Information

Search: _____

| Select ↑↓ | User Name ↑↓ | Title ↑↓ | View Only ↑↓ |
|---|--|--|--|
| <input type="checkbox"/> | Anderson, Renee | School Psychologist | <input type="checkbox"/> |
| <input type="checkbox"/> | Edmond, Kelly | Speech Therapist | <input type="checkbox"/> |

CLOSE
SAVE

Select Section504 Team

Users associated with all Schools who can access Section504 Information

Search: _____

| Select | User Name | Title | View Only |
|--------------------------|---------------------------------|-------|--------------------------|
| <input type="checkbox"/> | *Assistant, Aide | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Assistant, Ancillary | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Audiologist, District | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Behavior Specialist, District | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Committee Member, Other | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Counselor, Professional School | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Interpreter, District | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Nurse, School | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Nurse, Specialized School | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Nurse, Well Child | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Nutritionist, School | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Ot, Occupational Therapist | | <input type="checkbox"/> |
| <input type="checkbox"/> | *Principal, Assistant | | <input type="checkbox"/> |

CLOSE SAVE

Note: There is an option to **Search** for team members in the search bar at the top right of the page.

Once team members are selected, they will populate under the **Section504 Team** section.

Section504 Team SELECT SECTION504 TEAM

Committee Chairperson
Test, Laura

| Name | Relationship |
|------------------|--------------|
| Mom and Pop Test | Both Parents |

SAVE

> Parent/Guardian VIEW PARENT ACTIONS ADD NEW PARENT/GUARDIAN ASSOCIATE WITH EXISTING PARENT/GUARDIAN

> Student Information

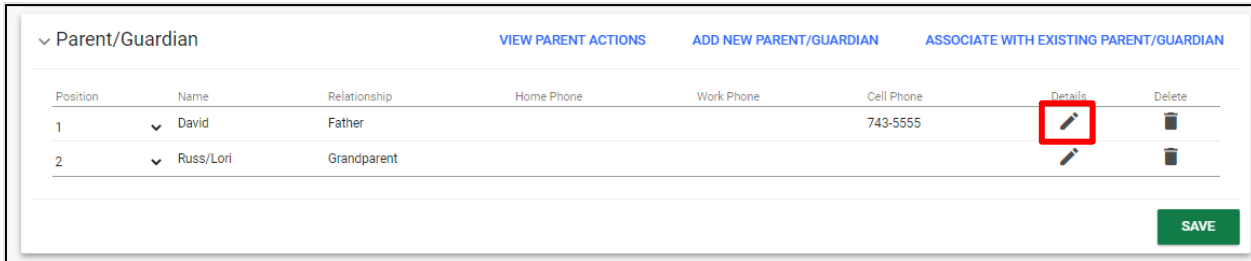
> Create Additional Documents





> Confirm Consent Event

> Documents for Amanda Test ATTACH DOCUMENTATION

Parent/Guardian

The **Parent/Guardian** section is used to add parents, guardians and other important people outside the school district who may need to be involved in the student's 504 service plan. To edit or view a parent or guardian's details, select the **pencil** icon.



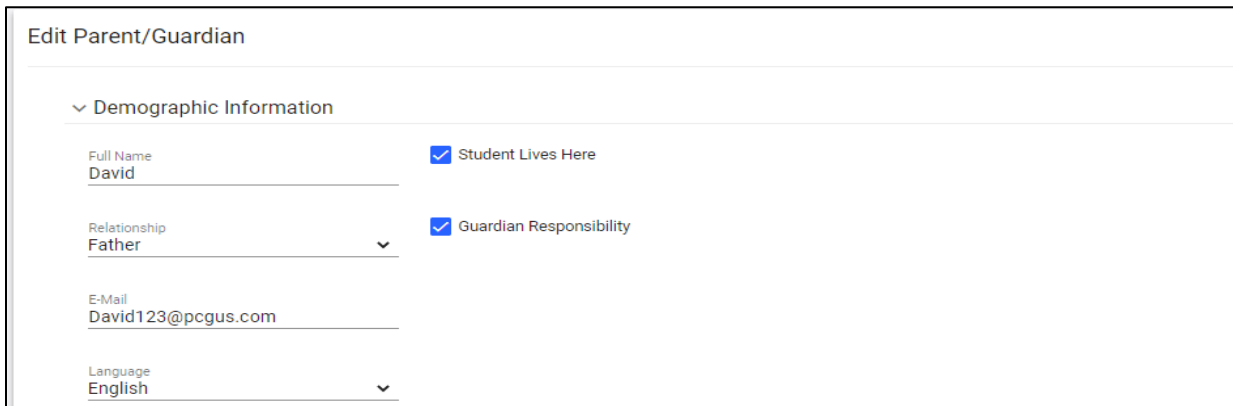
| Position | Name | Relationship | Home Phone | Work Phone | Cell Phone | Details | Delete |
|----------|-----------|--------------|------------|------------|------------|---|---|
| 1 | David | Father | | | 743-5555 |  |  |
| 2 | Russ/Lori | Grandparent | | | |  |  |

[VIEW PARENT ACTIONS](#) [ADD NEW PARENT/GUARDIAN](#) [ASSOCIATE WITH EXISTING PARENT/GUARDIAN](#)

SAVE

The **Edit Parent/Guardian** page allows users to edit parent and guardian information. Once all relevant information is added, click **Save**.

*Note: The **Student Lives Here** and **Guardian Responsibility** checkboxes must be checked for at least one guardian.*



Edit Parent/Guardian

Demographic Information

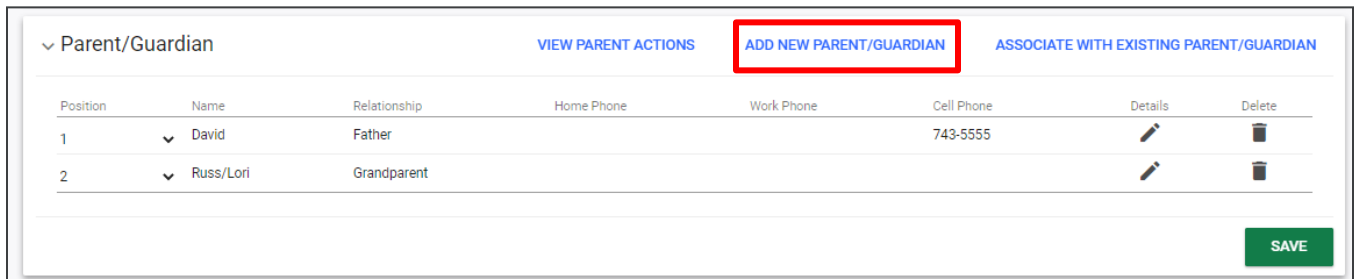
Full Name: Student Lives Here





Relationship: Guardian Responsibility

E-Mail:

Language:

To add a parent or guardian, click the **Add Parent/Guardian** button.



| Position | Name | Relationship | Home Phone | Work Phone | Cell Phone | Details | Delete |
|----------|-----------|--------------|------------|------------|------------|---|---|
| 1 | David | Father | | | 743-5555 |  |  |
| 2 | Russ/Lori | Grandparent | | | |  |  |

[VIEW PARENT ACTIONS](#) [ADD NEW PARENT/GUARDIAN](#) [ASSOCIATE WITH EXISTING PARENT/GUARDIAN](#)

SAVE

This will open a page where parent or guardian information can be added. Click **Add Parent/Guardian** and click **Save** when all relevant information has been added. This will return the user to the **Student, Parent, 504 Committee** page.

Note: The **Student Lives Here** and **Guardian Responsibility** checkboxes must be checked for at least one guardian.

Add Parent/Guardian

▼ Demographic Information

Full Name Student Lives Here
Mike Test

Relationship Guardian Responsibility
Stepfather ▼

E-Mail

Language ▼

▼ Phone Numbers

Work Phone Notification ▼ Priority ▼

View Parent Actions

The **View Parent Actions** section allows users to view recent actions parents have taken such as viewing, adding or editing a document.

▼ Parent/Guardian [VIEW PARENT ACTIONS](#) [ADD NEW PARENT/GUARDIAN](#) [ASSOCIATE WITH EXISTING PARENT/GUARDIAN](#)

| Position | Name | Relationship | Home Phone | Work Phone | Cell Phone | Details | Delete |
|----------|-------------|--------------|------------|------------|------------|---------|--------|
| 1 | ▼ David | Father | | | 743-5555 | | |
| 2 | ▼ Russ/Lori | Grandparent | | | | | |

[SAVE](#)

Use the dropdowns to filter and sort to view the desired parent actions. Click **Search** to see the results.

View Parent Actions [Close]

Begin Date: 04/18/2023 [Calendar Icon] End Date: 05/18/2023 [Calendar Icon]

Activity: Add [Dropdown Menu]
Delete
General
Update
View

Page: General [Dropdown Menu]

Secondary Sort: [Dropdown Menu]

[CLOSE] [SEARCH]

Associate with Existing Parent/Guardian

This section allows users to associate the student’s account with an existing parent/guardian in the system. Use the dropdown menus to filter by Grade Level, School, Last Name, First Name, etc. Click **View Parents** to see the results.

Search for Parents to Associate

Grade Level [Dropdown] School [Dropdown]

Parent Last Name [Text Input] Exact Match Parent First Name [Text Input] Exact Match


Title [Text Input] Exact Match Parent ID [Text Input] Exact Match

Sort By [Dropdown]

[VIEW PARENT(S)]

Click on the **name** of the parent or guardian to associate it with the student’s account. A new screen will load with a dropdown menu to indicate the person’s relationship to the student. You may also add any demographic information, addresses or phone numbers. Click **Save** when completed.

Select a Parent PRINT RESULTS EXPORT RESULTS SEARCH AGAIN

 Click on the name of the Parent / Guardian to associate the Parent / Guardian to the Student.

Search: _____

| Name ↑ | Parent ID ↑ | Home Phone ↑ | Work Phone ↑ | Cell Phone ↑ | E-Mail ↑ |
|------------|-------------|--------------|--------------|--------------|--------------------|
| Aaron Test | | | 1234567890 | | |
| Aaron Test | | | 1234567890 | | |
| Aaron Test | | 45545555000 | 1234567890 | 5404240173 | |
| Aaron Test | | | 1234567890 | | |
| Aaron Test | | | 1234567890 | | |
| Alice Test | | | | | |
| Alice Test | | | 2345678902 | | ragrawal@pcgus.com |
| Alice Test | | | +1555555555 | | |
| Alice Test | | | +1555555555 | | |
| Alice Test | | | 1234567890 | | |

Note: Select **Print Results** or **Export Results** to view results in a PDF or XLS format.

Student Information

The **Student Information** section allows users to view student information within the 504 application. The **Next School** dropdown will now appear and can be selected via the dropdown menu. Click **Save**.

Student Information

| | | |
|--|------------------------------|---------------------|
| Name: Emily JenStudent Test | Gender: M | DOB: 11/16/2010 |
| Student ID: 080004009054 | Primary Language: Spanish | Grade: 6th Grade |
| School: Warren County Middle School | Zoned School: -unknown- | Next School ▼ |
| Length of School Day(Std) 390.00 | minutes | ▼ |

SAVE

Create Additional Documents

You can create additional documents for the student, such as the **Initial Consent for Evaluation, Consent for Re-Evaluation, Invitation to Meeting, Procedural Safeguards, and Manifestation Determination**. All final documents and all draft documents created in the previous 30 days can be found at the bottom of the Documents tab.

*Note: The **Initial Consent for Evaluation** document will display as **Consent for Re-Evaluation** once the student has an eligibility determination.*

▼ Create Additional Documents

 Need TDOE instructions for timeline from consent to plan creation etc.

CREATE INITIAL CONSENT FOR EVALUATION

CREATE PROCEDURAL SAFEGUARDS

CREATE INVITATION FOR A MEETING

CREATE MANIFESTATION DETERMINATION

Confirm Consent Event

This section allows users to **Confirm Receipt or Denial of Consent for Evaluation/Re-Evaluation**. Once an option is selected, a pop-up will appear prompting the user to provide the date of receipt or denial. After a date is selected, it will populate in the space below. Click **Confirm Consent** or **Confirm Denial** to save.

*Note: Once **Confirm Receipt of Consent** is selected, the system will display a compliance symbol on the student search results. Since it is best practice that an eligibility determination needs to occur within 60 days of receiving consent to evaluate/re-evaluate, the symbol will display green, then yellow after 30 days if a determination is not made. The compliance symbol will display in red if 60 days elapse without a determination.*





▼ Confirm Consent Event

CONFIRM RECEIPT OF CONSENT **CONFIRM DENIAL OF CONSENT**

▼ Confirm Consent Event

Consent for 504 Evaluation Received Date
06/14/2023

CONFIRM RECEIPT OF CONSENT **CONFIRM DENIAL OF CONSENT**

| | | | | | | | | | |
|--------------------------|---|----------------|--------|------------|------|---------------|---|----|---|
| <input type="checkbox"/> |  | Ally | Test | 04/17/2015 | SAMP | Emma GPM Test |  | | |
| <input type="checkbox"/> |  | TestStudent306 | Andres | 504 | Test | 03/26/2008 | Rocket | 04 |  |

Documents

Users can attach necessary documents by selecting **Attach Documentation**. A pop-up will display to attach files. Select **Upload Files** and click **Close** when completed. A list of all uploaded documents will be displayed in this section.

Note: If a file name/description is not provided, the document will be labeled as the original file name.

Documents for Emily JenStudent Test ATTACH DOCUMENTATION

Show 10 entries Search: _____


| Doc ID ↑ | Date Generated ↓ | Generated By ↓ | Document ↓ | Status ↓ | Include in Batch ↓ | Attachment ↓ |
|----------|------------------|----------------|--|----------|--------------------|--------------|
| 261744 | 03/09/2016 | Renee Gipson | OT Initial Evaluation | Uploaded | | |
| 268763 | 05/13/2016 | Renee Gipson | Hopkins, J EOY PR 5.13.16 | Uploaded | | |
| 342035 | 02/27/2019 | Laura Butler | OT Eval 2-14-19 | Uploaded | | |
| 343243 | 03/06/2019 | Debra Odineal | Jerico Hopkins EIR sig_3-19_000021 | Uploaded | | |
| 343244 | 03/06/2019 | Debra Odineal | Jerico Hopkins Re-eval. Summ. sig_3-19_000022 | Uploaded | | |
| 350915 | 05/15/2019 | Laura Butler | OT Update 5-14-19 | Uploaded | | |
| 351266 | 05/16/2019 | Shea Panter | J. Hopkins Manifestation Determination for Truancy | Uploaded | | |
| 351267 | 05/16/2019 | Shea Panter | J. Hopkins Signatures of Manifestation | Uploaded | | |
| 438067 | 12/06/2021 | Kristen Kell | Kristen Kell Form20211206_11295170 | Uploaded | | |




Showing 1 to 9 of 9 entries Previous 1 Next

(9 Documents)

CREATE DOCUMENT BATCH

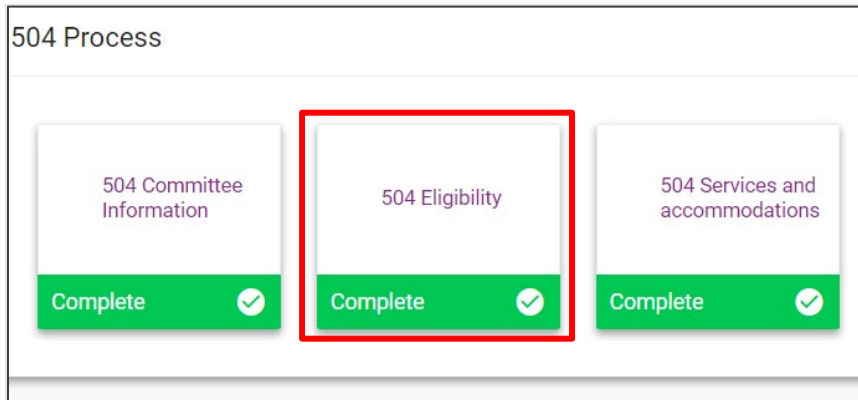
Attach Documentation for ✕

 Permitted file extensions are: PDF, DOC, XLS, TXT, RTF, PPT, TIF, JPG, PNG, XLSX, PPTX, and DOCX. No file may be greater than 1000 MB in size.

| File | Name (if not provided, the file name will be used) |
|---|--|
|  | _____ |
|  | _____ |
|  | _____ |

CLOSE UPLOAD FILE(S)

504 Eligibility



Navigate to the **504 Eligibility** tile using one of the methods of navigation indicated above. A new page guides users through a set of five questions to establish a student's 504 eligibility. The first four questions are required to complete this step in the process and advance to the next. The system allows students to be identified as non-eligible if they have an impairment, but that impairment does not substantially impact a major life activity.

The eligibility questions are as follows:

- Question #1 describes the student's present impairment.
- Question #2 identifies the student's specific impairment.
- Question #3 provides major life activities impacted by the impairment and if the activity is substantially limited.
- Question #4 indicates the severity of the impairment and the impact on the student's school environment.

1. Select an option by **checking the box** that best describes the student's present circumstance: (a) has a physical or mental impairment, (b) has a record of such an impairment, or (c) is regarded as having such an impairment.

Note: The date fields above the first question cannot be populated by users. If the student has a current eligibility determination, the date the student was made eligible appears in the left-hand field. The system calculates the 3-year re-evaluation date and places it in the right-hand field. These fields are blank if the student is not currently eligible.

504 Eligibility Information

Section 504 Eligibility Date: _____ Proj Section 504 Eligibility Date: _____

1. The student presently:

- (a) has a physical or mental impairment
- (b) has a record of such an impairment
- (c) is regarded as having such an impairment

- Select the student's impairment(s) from the dropdowns and provide any details related to the impairment (e.g., users may select Cancer and write "Leukemia" in the **Details**, or select **Allergies** and type in "Eggs, Dairy." If **Other** is selected as the impairment, the **Details** field is required. The **Details** field may also be used to enter more detailed information for any impairment.

3. Does the student's impairment impact any major life activities? Add all that apply.

ADD MAJOR LIFE ACTIVITY

i To add a Major Life Activity impacted by the student's impairment(s), click ADD MAJOR LIFE ACTIVITY above.

| Pos | Major Life Activity | Substantially Limits? | Suspected Impairment | Evidence | Edit | Del |
|-----|---------------------|-----------------------|--------------------------|---|------|-----|
| ▼ | Walking | Yes | Musculoskeletal Disorder | Difficulty walking long distances, might need wheelchairs or other forms of walking aids, recess and gym class will need extra accommodations | | |

- Next, select which **Major Life Activities**, if any, are affected. Select **Add Major Life Activity** to add more details.

2. What is the student's impairment?

Impairment: Musculoskeletal Disorder ▼ Details: Emily has a form of Muscular Dystrophy

Impairment: _____ ▼ Details: _____

Impairment: _____ ▼ Details: _____

Impairment: _____ ▼ Details: _____

Once selected, a pop-up will display. Select a **Major Life Activity** from the dropdown menu, then indicate if the student is substantially limited by choosing **Yes** or **No**. Next, select the suspected impairment(s) associated with the major life activity. Finally, provide details of how the impairment limits the major life activity. Click **Save** to add the major life activity and close the pop-up. To add another life activity, click **Save and Add Another Life Activity**. If there are multiple major life activities listed, users can change the position to reorder the list items. Use the dropdown under **Pos** to select the order.

Add Additional Life Activities ✕

i From the dropdown list, choose the major life activity(s) or major bodily function/system(s) that are limited:

Major Life Activity:
Walking ▼

i Do(es) the impairment(s) substantially limit the student's major life activity or major bodily function when in an active state, without the use of any mitigating measures(s) to a substantial degree? Or, if the student is not using any mitigating measures, does the impairment limit the student's major life activity(s) or major bodily function(s) when in an active state to a substantial degree?

Substantially Limited?
 Yes No

What is the suspected impairment(s) which is associated with the major life activity?
 Musculoskeletal Disorder

Describe how the impairment limits the major life activity:
Difficulty walking long distances, might need wheelchairs or other forms of walking aids, recess and gym class will need extra accommodations

SAVE AND ADD ANOTHER LIFE ACTIVITY **CLOSE** **SAVE**

4. In this section, users will select the option from the list that best describes the student. If the first option is selected, the student is considered **504-eligible**. The remaining options describe reasons for **504 non-eligibility** determinations.

4. In accordance with Section 504 eligibility standards, this student:

i This note will explain the resulting eligibility status/document from each selection.

Has a physical or mental impairment that significantly impacts a major life activity and meets eligibility standards to be identified as having a Section 504 Disability.

Does not meet the standards to be identified as having a Section 504 Disability.

Has a physical or mental impairment that significantly impacts a major life activity but student's needs will be met through an IEP.

Has a physical or mental impairment that significantly impacts a major life activity but parent refuses services and/or accommodations.

5. The last section of the **504 Eligibility** page allows users to include any supporting documentation used as a part of the eligibility determination process. The **Attached** field should be used to indicate if the documents will be attached to the student's record via the **Attach Documentation** button within the **Documents** panel. Users can document when a report or supporting document is added or completed. Enter the name and title of the person who completed the documentation and the report date in the dropdown menu.

5. Supporting documents completed by:

| Name | Title | Date of Report | Attached |
|---------------|---------|----------------|----------|
| Jennifer Test | Teacher | 05/16/2023 | Yes |
| | | mm/dd/yyyy | |
| | | mm/dd/yyyy | |
| | | mm/dd/yyyy | |
| | | mm/dd/yyyy | |

CREATE DRAFT 504 ELIGIBILITY CREATE FINAL 504 ELIGIBILITY SAVE

Once completed, click **Create Draft** or **Create Final**. Draft documents will contain a "Draft" watermark and will need to be finalized within 30 days.

Create Draft 504 Eligibility

Section 504 Eligibility Date
06/14/2023

Impairments

Impairment: ADHD Details: Hyperactive

Meeting Participants

| Name | Title | Attended Meeting | Student | Has knowledge of | Placement Options |
|------------------|--------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| Laura Dunn Test | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Mom and Pop Test | Both Parents | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

ADD MORE PARTICIPANTS

Include Procedural Safeguards?
 Include Spanish Translated Document

CREATE DRAFT CLOSE SAVE

Enter the student's **date of 504 eligibility**. The student's impairment(s) will auto-populate from data previously entered in the **Eligibility Report** page. To add additional participants, click **Add Participants** and enter the name and title of each additional participant in the blank provided. The user may also indicate the participant's level of knowledge from the check boxes provided. There is also a check box to include procedural safeguards. Once completed, click **Create** to save a **draft** or **final** version of the **Eligibility Report** document. Once you have saved a final report, a PDF will be generated in a new window.

The screenshot shows a form for creating an eligibility report. It includes a signature field with a handwritten signature and a 'CLEAR SIGNATURE' button. A date field is set to 06/15/2023. Below the signature field is an 'ADD MORE' button. At the bottom, there are checkboxes for 'Include Procedural Safeguards' (unchecked) and 'Include Spanish Translated Document' (checked). At the very bottom are 'CREATE FINAL', 'CLOSE', and 'SAVE' buttons.

When creating a **final report**, there will be options for parent signature including using *Connect*, electronically signing in person, or signing a paper copy. If the user chooses for parents to sign electronically, a signature box will appear. Sign and select the date signature. If more parents or guardians were present, select **Add More** for additional signature box(es) to appear.

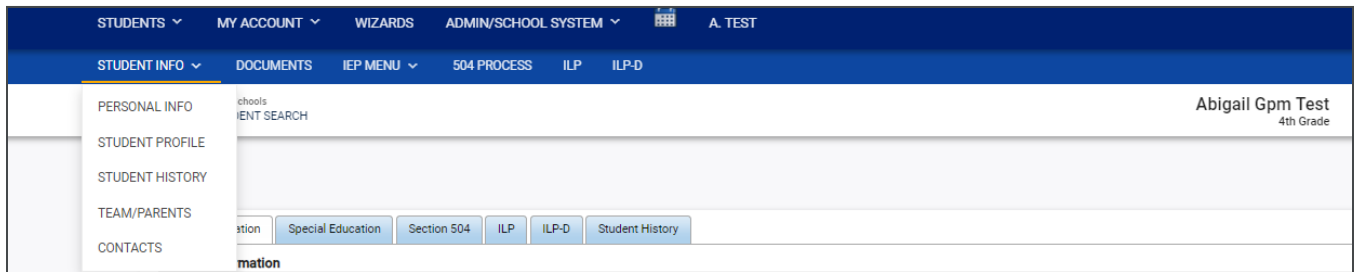
Note: Once finalized, the system will track this document on the required 3-year timeline for student re-evaluation. Additionally, the student's compliance symbol will display yellow for 30 days or until a plan is created. The symbol will display red if 30 days elapse without a plan being created.

| | | | | | | | |
|--------------------------|-----------|-----------------------|------|------------|------------|---------------|-----|
| <input type="checkbox"/> | ✓ 5 ✓ ✓ ✓ | Ally | Test | 04/17/2015 | SAMP | Emma GPM Test | 504 |
| <input type="checkbox"/> | ✓ 5 ✓ ✓ ✓ | TestStudent306 Andres | 504 | Test | 03/26/2008 | Rocket 04 | 504 |

Sending Documents to Parents for Signature

Follow the steps below to send documents to parents for signature through **Connect**:

1. After selecting a student, click **Team and Parents** under the **Student Info tab**.



2. If a parent/guardian does not currently exist, add a parent by selecting **Add New Parent/Guardian**. If a parent/guardian already exists, select the pencil icon under **Details**.

| Parent/Guardian | | | | | | | | | VIEW PARENT ACTIONS | ADD NEW PARENT/GUARDIAN | ASSOCIATE WITH EXISTING PARENT/GUARDIAN |
|-----------------|--------------------|----------------|-------------------------|--------------|------------|------------|---------|--------|---------------------|-------------------------|---|
| Position | Name | Relationship | Guardian Responsibility | Home Phone | Work Phone | Cell Phone | Details | Delete | | | |
| 1 | ▼ Aimee Nichols | Family Friend | No | 615 546-4890 | | 7042361650 | | | | | |
| 2 | ▼ Angel Lucero | Father | Yes | 6152593282 | 6158781806 | | | | | | |
| 3 | ▼ Debbie's Daycare | Transportation | No | 6155555555 | | | | | | | |

[SAVE](#)

When adding/editing a parent/guardian be sure to complete the following fields:

- a. Name
- b. Relationship
- c. Student Lives Here
- d. Guardian Responsibility
- e. Email
- f. Phone number

✓ Demographic Information [VIEW PARENT ACTIONS](#)

Full Name Student Lives Here
 Aimee Test

Relationship Guardian Responsibility
 Mother

E-Mail
 email@email.com

Language

✓ Phone Numbers

Work Phone

Work Fax

Cell Phone
 7042361650

3. Add the parent/guardian to the team then click **Add Parent/Guardian**.

✓ Team Access

Include on IEP Team
 Include on RTI Team
 Include on BP Team
 Include on Section504 Team
 Include on ILP Team
 Include on ILP-D Team

✓ English Proficiency

English Proficient Interpreter Needed Written Translation Needed

Does the family have someone to serve as the interpreter?

✓ Comments

Comments

4. Once the parent/guardian is added to the team, and a document is being created with the desired application (ILP, ILP-D, Eligibility, 504 and IEP/ISP), be sure to select **The parent will sign electronically using Connect**. Click **Create Final**.


Create Parent Notification Letter

Please select how the parent/guardian will sign the ILP letter.

The parent will sign a paper copy.
 The parent will sign electronically in-person
 The parent will sign electronically using Connect.

Notification Date
06/09/2023

School Official Certification
 I certify that I have reviewed the above information and that the parent or guardian is fully informed regarding EL programs and the student has been placed in the appropriate program.

| Name | Signature | Date |
|---|--|------------|
| School Official: ESL Teacher Joann Runion |  | 06/27/2023 |

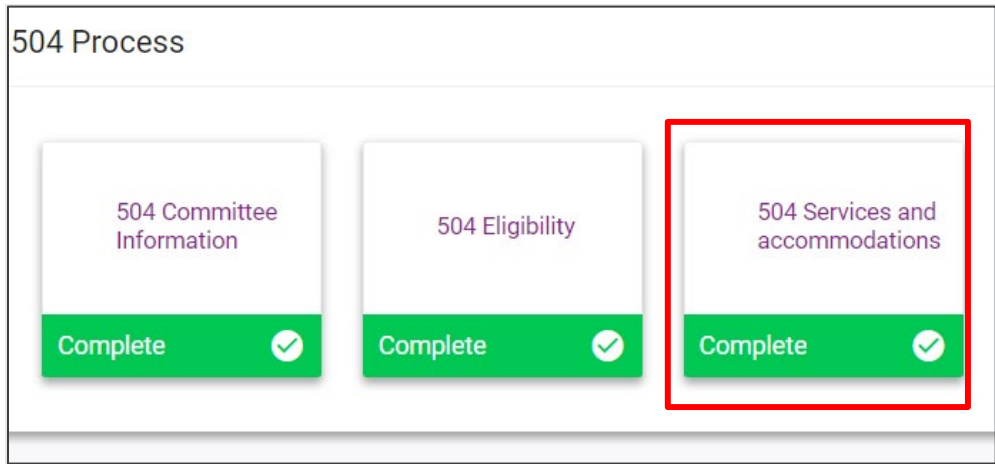
Include Spanish Translated Document

- Once the parent has signed the document via **Connect**, navigate back to the student's document page. There will be two versions of the document; the document in the **Attachment** column will have the responses and signatures captured via Connect.

Documents for Baxter Rti Test ATTACH DOCUMENTATION

| Doc ID | Date Generated | Generated By | Document | Status | Include in Batch | Attachment |
|--------|----------------|---------------------|---|--------|--------------------------|---|
| 491935 | 06/05/2023 | Christian Kissinger | Section 504 Manifestation Determination | Final | <input type="checkbox"/> | Section 504 Manifestation Determination |

504 Services and Accommodations



504 Services

After completing the **Eligibility Report** page, the last section in the 504 Process is the **504 Services and Accommodations** page. This is where the student’s Section 504 Service Plan content is entered. Select **Yes** or **No** indicating whether the student will receive 504 services in addition to accommodations. If **Yes** is selected, the user must then click **Add Services**. If there are multiple services listed, users can change the position to reorder the list items. Use the dropdown under **Pos** to select the order.

504 Services

Will the student receive 504 services in addition to accommodations?

Yes No

ADD SERVICE

SAVE

Select the appropriate service(s) from the dropdown list. Enter the start and end date for the service. If the service frequency and duration are **As Needed**, check the corresponding box, and click **Save**. Use the dropdown menu to select the **Responsible Committee Member**. The dropdown will populate titles of school roles versus names of individual committee members.

If the service frequency and duration are specified, the user may enter numerical values for **Time/Amount** per session, **Number of Hours/Minutes**, and the **Frequency of Sessions Per Day/Week/Month/Year**. Once completed, click **Save** or **Add Another Service**.

Add 504 Service
✕

Service
504-Recreation Services ▼

Start Date
06/07/2023 📅

End Date
06/30/2023 📅

As Needed

Time/Amount
30

Number of
minutes ▼

Frequency Session(s)
3

Per (Time Period)
week ▼

Responsible Committee Member ▼

Additional Information

CLOSE

SAVE

ADD ANOTHER SERVICE

504 Accommodations

Under the **504 Accommodations** section, select the appropriate accommodation(s) based on the student's needs. Accommodations are broken down into the following categories: **Classroom and Curricular Accommodations**, **Testing - Classroom/District**, and **Technically Eligible**. To add accommodations for each category, click **Add 504 Accommodations**. If there are multiple accommodations listed, users can change the position to reorder the list items. Use the dropdown under **Pos** to select the order.

504 Accommodations

NOTE:

Accommodations for the ACT must be approved by ACT. If you have a student participating in the ACT, contact your District Testing Coordinator for more information about the use of ACT Allowable Accommodations.

Select ONLY those accommodations that the student needs.

The additional information field is available to provide details relative to the selected accommodations but is not required.

Classroom and Curricular Accommodations [ADD 504 ACCOMMODATIONS](#)

Testing - Classroom/District [ADD 504 ACCOMMODATIONS](#)

Technically Eligible [ADD 504 ACCOMMODATIONS](#)

CREATE DRAFT 504 PLAN CREATE FINAL 504 PLAN SAVE

Then select the appropriate subcategory from the dropdown menu under **Accommodation Area**.

Add Classroom and Curricular Accommodations

Accommodation Area
Physical Environment

Accommodations/Modifications

- 1 - Seat student near the teacher
- Seat student in an area free from distractions
- Reduce classroom distractions
- Seat student out of main traffic areas
- Behavior Plan
- Provide more space for student to store and use various instructional aids
- Allow student additional breaks or rest time (water breaks, movement breaks)
- Arrange classroom to facilitate small group, large group, and peer learning opportunities
- Ensure proper lighting
- Ensure proper desk height and seating comfort
- Arrange classroom to ensure physical accessibility
- Modify instructional materials as needed
- Provide opportunities for student to visit special interest centers
- Extra Time between classes
- Nursing Assistance
- Wheelchair Assistance
- Bathroom Assistance

CLOSE SAVE

Once selected, a list of **Accommodations/Modifications** will be generated. Check the boxes for the desired accommodations/modifications. If the accommodation/modification is not listed, you can add your own by choosing **Other** and typing in the blank space provided. Click **Save** once completed.

Add Classroom and Curricular Accommodations

Accommodation Area

- Physical Environment
- Instructional Materials
- Instructional Methods
- Assignments/Homework
- Behavior
- Extra-Curricular Activities
- Health Plan

CLOSE SAVE

Other

Specify Other:
Special pencil grip

When selected, each accommodation/modification will display a **Describe** text box for details on the implementation of the accommodation specific to the student's needs. The **Describe** boxes are optional.

Physical Environment

- Seat student out of main traffic areas
Describe
- Extra Time between classes
Describe
- Wheelchair Assistance
Describe
- Other - Special pencil grip
Describe

Once all accommodations are added and saved, click **Create Draft 504 Plan** or **Create Final 504 Plan**. If creating a final 504 plan, enter the **504 Meeting Date**. The **504 Begin Date** and **End Date** will automatically populate. The **504 Service Dates** will also populate for reference purposes. The system will automatically select **Initial** for **Meeting Purpose**. If the purpose is different, select another option using the dropdown menu.

| | | | | |
|---|--|--|--------------------------|------------------------|
| Section 504 Plan Meeting Date 06/20/2023 | | 504 Service Dates for Reference 504-Recreation Services | Start Date 06/07/2023 | End Date 06/30/2023 |
| Section 504 Plan Begin Date 08/08/2022 | | | | |
| Section 504 Plan End Date 08/07/2023 | | | | |
| Meeting Purpose Initial | | | | |

Use the checkboxes to organize the **Meeting Participants**. Indicate which individual is the student, others who attended the meeting, and if the teacher agrees with the proposed 504 services.

If the parents agreed to sign electronically, a signature field will populate. Have the parent or guardian sign and select the date of signature.

Create Final 504 Service Plan ✕

| Name | Title | Attended Meeting | Student | Evaluation Data | Placement Options | In Agreement? |
|----------------------------|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--|
| Kendra Test22 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Assistant *Principal | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| School *Psychologist | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Regular Education *Teacher | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Ann Miller | Mother | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

Title

CLEAR SIGNATURE

Date

06/21/2023

Title

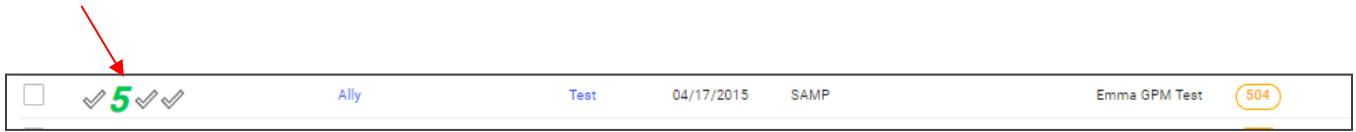
Date

CREATE FINAL

CLOSE

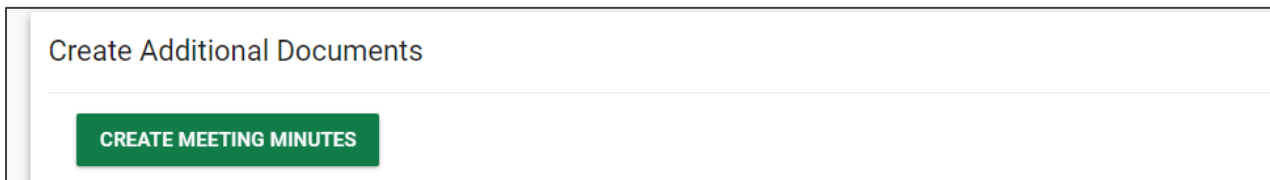
SAVE

Once a plan document is finalized, the **504 Process** is complete and the compliance symbol will change to a **Green 5**. The system will then track the student's 504 plan document on an annual review timeline and update the appropriate team members before the annual review date.



Meeting Minutes

Under the **Create Additional Documents** section, there is an option to **Create Meeting Minutes**. This tool allows users to document notes from meetings from within the 504 application. Users can also add a signature for the meeting recorder and include a translated version of the document.

A form titled 'Create 504 Meeting Minutes'. It contains several input fields: 'Date of Meeting' with the value '05/16/2023', 'Meeting Purpose' with a dropdown menu set to 'Initial', a text area for 'Summary/Highlights of Discussion by the Section 504 Committee:', and another text area for 'Section 504 Team Recommendations:'. Below these is a 'Signature of Recorder:' field containing a handwritten signature on a line, with a green 'CLEAR SIGNATURE' button underneath. At the bottom left, there is a checkbox labeled 'Include Spanish Translated Document'. At the bottom right, there are four green buttons: 'CREATE DRAFT', 'CREATE FINAL', 'CLOSE', and 'SAVE'. A red rectangular box highlights the signature field and the 'CLEAR SIGNATURE' button.

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