



IEP Management

Presented By:
Illinois State Board of Education
and
Harrisburg Project

What is I-Star?

- * Web-based Special Education Tracking and Reporting
- * Fully integrated with Student Information System (SIS)
- * Fully integrated with Educator Information System (EIS)
- * Fully integrated with Educator Licensure Information System (ELIS)
- * Security system specific to district and user needs
- * IEP Activity Log for auditing purposes
- * Archived IEPs

I-Star Features



- * Wizard integration on forms for improved IEP creation
- * Web-based (accessible from any computer with Internet connection)
- * FREE!
- * Should save time
- * Electronic transfer of records between placements
- * Each user account is catered to their own case load only
- * Uses State IEP forms
- * Parent Data Import
- * Allows for PDF, Word Document, etc. attachments

Recent Enhancements

- * Saves within the wizards
- * List of students from SIS so users don't have to search for case loads
- * Date, time and user name stamped in *IEP Timeline*
- * Data elements unknown during IEP preparation can be left blank (these will generate errors that will have to be addressed before the IEP can be made official, but will not prevent progression through wizards)
- * Birth to 3 issues will be resolved soon

Topics

- * Access to I-Star
- * Security Management User Roles (District Superintendent or Designee)
- * IEP Administrator Roles
- * IEP Case Management
 - * Parent/Guardian(s) Information
 - * Student Profile Information
 - * Create an IEP
 - * Present Levels of Academic Achievement and Functional Performance Goals and Objectives/Benchmarks
- * Mark IEP Official
- * Progress Reports
- * Print Draft IEP
- * Print an Official IEP
- * IEP Revisions and Amendment Process
- * Annual Review/Reevaluation
- * Archived IEPs
- * Activity Logs

ACCESS TO I-STAR

Access to I-Star

- * First Step - IWAS

- * IWAS = ISBE Web Application System

- www.isbe.state.il.us

- * All staff must first sign-up through IWAS

- * This access will be approved by a District Superintendent or Cooperative Administrator

- * For guidance on setting up an IWAS account, access the IWAS User Guide:

- <https://sec1.isbe.net/iwas/documents/pdf/IWASUserGuide.pdf>

Access to I-Star

* Second Step - I-Star

- * Once an IWAS account is established, staff will request access to I-Star (see screen shot below)
- * This access will be approved through IWAS by a District Superintendent or Cooperative Administrator
- * For guidance on requesting I-Star access, view the IWAS User Guide (Page 5):
<https://sec1.isbe.net/iwas/documents/pdf/IWASUserGuide.pdf>

Access to I-Star

* After logging in, go to *System Listing* then click *I-Star - (Special Education)*

IWASTRAIN **IWASTRAIN** **IWASTRAIN** **IWASTRAIN** **IWASTRAIN** **IWASTRAIN**

Login: WOVSEADMIN

My Systems

Below are systems that you are either authorized to use or are awaiting authorization from either your district (Pending-District), ROE (Pending-ROE) or ISBE (Pending-ISBE). Once you are "Authorized" to access a system, simply click on the system description to use it. [Click Here for Due Dates](#)

Categories - Click to Expand/Collapse Tree	Authorization
Reporting	
Annual	
	Authorized
	Authorized
	Authorized
	Authorized
I-Star - (Special Education)	Authorized

Legend: ⓘ : System Description - Detailed 📅 : Due Dates 👤 : Profile

[Want to Signup for Other Systems?](#)

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Access to I-Star (Landing Page)

- * Third Step – Request I-Star Security Role
- * The mid-section of the *Landing Page* will differ for users based on the types of Security Roles that have been assigned to them
- * If *Request Access* is the only option, click the button to request the type of IEP Management access needed

Welcome Coop User

wovsed2 Doc Author

Norris City Annex

9-4-2013: Security upgrades have been deployed. A training video on configuring the security as well as some documentation will be distributed shortly.

Welcome to the new web based iePoint system. We hope you are as excited about it as we are!

Please feel free to share all questions, concerns and comments that you have with us [here](#). Your input is very valuable to us.



Request Access

Are you not seeing a list of students? Use this link to request a change to your IEPoint.net security settings.

Landing Page

(All Users)



The *Landing Page* acts as the system homepage

My IEP Students reflects the user's case load

My IEP Students			
SISID	Name	Birthdate	Home School
999999904	John X Four	01/01/1999	Harrisburg High School
999999901	John X One	01/01/1999	Harrisburg High School
999999903	John X Three	01/01/1999	Harrisburg High School
(Page 1 of 1) Page <input type="text" value="1"/> Items Per Page <input type="text" value="20"/>			
View All			

Access to I-Star

IEP Administrator Access

IEP Case Management Tool (Clear)	
Current Access	Role Name
<input type="radio"/>	IEP Basic Access ?
<input checked="" type="radio"/>	IEP Administrator Access ?
<input type="radio"/>	IEP Read-Only Access ?

I. IEP Administrator Access

- Create IEPs
- Search for students
- Modify an IEP Access List
- Manage Form Contacts, Letterheads, Coversheets, and Common Users
- Access and modify IEPs when listed on the IEP Access List

Home
Goal Mine
Facility Search
IEP Quality

wovsed2 Doc Author: Coop User

Welcome Coop User
wovsed2 Doc Author
Norris City Annex

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My IEP Students			
SISID	Name	Birthdate	Home School
999999906	John X Six	01/01/1999	Harrisburg High School

(Page 1 of 1)
Page 1
Items Per Page 20
View All

Search for an IEP Student
Use this quick link to go to the Student Search.

IEP Common Users
Use this quick link to modify common users for your district.

IEP Letterheads
Use this quick link to modify letterheads.

IEP Coversheets
Use this quick link to modify coversheets.

IEP Form Contacts
Use this quick link to modify form contacts.

IEP Student Parent Imports
Use this quick link to upload student and parent contact files.

Request Access
Are you not seeing a list of students? Use this link to request a change to your iePoint.net security settings.

Meetings
Meetings for: Today

You will see a list of upcoming meetings here if you were listed as a meeting attendee. You can look for upcoming meetings up to 4 weeks by changing the selection in the dropdown that is present in the header.

Subject	Date
No Records Found	

Reminders
Reminders for: Today

You will see a list of reminders that you have set up. You can look for future reminders up to 4 weeks by changing the selection in the dropdown that is present in the header.

Subject	Date	Type
No Records Found		

Access to I-Star IEP Basic Access

IEP Case Management Tool	
Current Access	Role Name
<input checked="" type="radio"/>	IEP Basic Access ?
<input type="radio"/>	IEP Administrator Access ?
<input type="radio"/>	IEP Read-Only Access ?

II. IEP Basic Access:

- Access and modify IEPs when listed on the IEP Access List

Home
Goal Mine
Facility Search
IEP Quality

wovsed2 Doc Author: Coop User

Welcome Coop User
wovsed2 Doc Author
Norris City Annex

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Request Access
Are you not seeing a list of students? Use this link to request a change to your IEPPoint.net security settings.

My IEP Students

SISID	Name	Birthdate	Home School
999999906	John X Six	01/01/1999	Harrisburg High School

(Page 1 of 1)
Page
Items Per Page

[View All](#)

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You will see a list of upcoming meetings here if you were listed as a meeting attendee. You can look for upcoming meetings up to 4 weeks by changing the selection in the dropdown that is present in the header.

Subject	Date
No Records Found	

Reminders
Reminders for:

You will see a list of reminders that you have set up. You can look for future reminders up to 4 weeks by changing the selection in the dropdown that is present in the header.

Subject	Date	Type
No Records Found		

Access to I-Star

IEP Read-Only Access

IEP Case Management Tool (Clear)	
Current Access	Role Name
<input type="radio"/>	IEP Basic Access ?
<input type="radio"/>	IEP Administrator Access ?
<input checked="" type="radio"/>	IEP Read-Only Access ?

III. IEP Read-Only Access:

- a. Read-only access to IEPs when listed on the IEP Access List

Home
Goal Mine
Facility Search
IEP Quality

wovsed2 Doc Author: Coop User

Welcome Coop User
wovsed2 Doc Author
Norris City Annex

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My IEP Students

SISID	Name	Birthdate	Home School
999999906	John X Six	01/01/1999	Harrisburg High School

(Page 1 of 1)
Page
Items Per Page

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[View All](#)

Request Access
Are you not seeing a list of students? Use this link to request a change to your IEPPoint.net security settings.

Meetings
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You will see a list of upcoming meetings here if you were listed as a meeting attendee. You can look for upcoming meetings up to 4 weeks by changing the selection in the dropdown that is present in the header.

Subject	Date
No Records Found	

Reminders
Reminders for:

You will see a list of reminders that you have set up. You can look for future reminders up to 4 weeks by changing the selection in the dropdown that is present in the header.

Subject	Date	Type
No Records Found		

SECURITY MANAGEMENT USER ROLES *(District Superintendent or Designee)*

Security Management (*District Superintendent*)

- * A district superintendent or cooperative administrator IWAS account assigns case management security roles to I-Star users
- * A district superintendent or cooperative administrator may designate this role to another user by selecting the current access button under District "Security Administrator"

District Security Administrator	
Current Access	Role Name
<input checked="" type="radio"/>	District Security Administrator

Security Management

User Roles

- * There are three types of user roles:
 - * IEP Administrator
 - * IEP Basic Access
 - * IEP Read-Only

Security Management

User Roles



IEP Case Management Tool (Clear)	
Current Access	Role Name
<input type="radio"/>	IEP Basic Access ?
<input checked="" type="radio"/>	IEP Administrator Access ?
<input type="radio"/>	IEP Read-Only Access ?

IEP Basic Access

- * Access IEPs when listed on the IEP Access List
- * Modify IEPs when listed on the IEP Access List

IEP Read-Only Access

- * Access to IEPs when listed on the IEP Access List

IEP Administrator Access

- * Search for Students
- * Create IEPs
- * Modify an IEP Access List
- * Manage Form Contacts, Letterheads, Coversheets and Common Users
- * Access and Modify IEPs when listed on the IEP Access List

Security Management (Security Administrator)

* A District Superintendent, Cooperative Administrator or designated Security Administrator assigns or approves/denies security requests

* To manage security, click *Home*, *Manage Security* and/or *Approve/Deny a Security Request*

The screenshot shows the Wovsed Admin interface. At the top is a navigation bar with links: Home, Admin, Goal Mine, Facility Search, and IEP Quality. The 'Home' link is highlighted with a red box. Below the navigation bar, the main content area is divided into two columns. The left column contains a welcome message for 'Wovsed Admin' (Wabash & Ohio Valley Sp Ed Dist) and a blue announcement: '9-4-2013: Security upgrades have been deployed. A training video on configuring the security as well as some documentation will be distributed shortly.' The right column contains a table titled 'My IEP Students' with columns for SISID, Name, Birthdate, and Home School. Below the table are pagination controls. At the bottom of the page is a grid of quick links. The 'Manage Security' link in the first row is highlighted with a red box. The 'Approve/Deny a Security Request' link in the second row is also highlighted with a red box.

Welcome Coop Admin
Wovsed Admin
Wabash & Ohio Valley Sp Ed Dist

9-4-2013: Security upgrades have been deployed. A training video on configuring the security as well as some documentation will be distributed shortly.

Welcome to the new web based iePoint system. We hope you are as excited about it as we are!

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SISID	Name	Birthdate	Home School
999999904	John X Four	01/01/1999	Harrisburg High School
999999901	John X One	01/01/1999	Harrisburg High School
999999903	John X Three	01/01/1999	Harrisburg High School

(Page 1 of 1) Page 1 Items Per Page 20 View All

Manage Security
Use this quick link to manage security for your staff members.

Search for an IEP Student
Use this quick link to go to the Student Search.

IEP Common Users
Use this quick link to modify common users for your district.

IEP Letterheads
Use this quick link to modify letterheads.

IEP Coversheets
Use this quick link to modify coversheets.

IEP Form Contacts
Use this quick link to modify form contacts.

IEP Student Parent Imports
Use this quick link to upload student and parent contact files.

Approve/Deny a Security Request
At least one person has submitted a security request. Use this quick link to view the details of the request.

Security Management (Security Administrator)

- * To choose from a list of users in the coop or district to manage security, click *Manage Security* tab
- * If a Security Request has been made by a user, it will be reflected on the *Security Requests* tab

User List

Manage Security

Security Requests (0)

User Name filter: All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Users by Name

Iwas UserId	Full Name	Entity	Email	Approval Group	Logged In	Roles	Is Active
wovsedDistDoc1	wovsed1 DistrictDoc1	Norris City Annex	here@there.com	Document Author	<input checked="" type="checkbox"/>	<div>Role Name</div> <div>IEP Administrator Access</div> <div>District Security Administrator</div>	True
wovsedDistDoc2	wovsed2 Doc Author	Norris City Annex	here@there.com	Document Author	<input checked="" type="checkbox"/>	<div>Role Name</div> <div>IEP Read-Only Access</div>	True
wovsedDistDoc3	wovsed3 Dist Document	Wabash & Ohio Valley Sp Ed Dist	here@there.com	Document Author	<input type="checkbox"/>	<div>Role Name</div> <div>IEP Basic Access</div>	True

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Page 1

Items Per Page 20

Security Management (Security Administrator)

- * To review a security request, click the glasses icon under *Review Request* column

User List

Manage Security

Security Requests (1)

Pending Security Requests							
Review Request	User Name	Full Name	Entity	Email	Logged In	Roles	Is Active
	wovsedDistDoc2	wovsed2 Doc Author	Norris City Annex	here@there.com	<input checked="" type="checkbox"/>	<div><div>Role Name</div><div>IEP Read-Only Access</div></div>	True

- * Review the request under *Requested Access*, click *Approve or Deny* and *Save*

District Security Administrator (Clear)			IEP Case Management Tool (Clear)		
Request Access	Current Access	Role Name	Request Access	Current Access	Role Name
<input type="radio"/>	<input type="radio"/>	District Security Administrator	<input type="radio"/>	<input type="radio"/>	IEP Basic Access ?
<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	IEP Administrator Access ?
<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	IEP Read-Only Access ?

Personnel Approvals (Clear)			Personnel Approvals / Claims Import (Clear)		
Request Access	Current Access	Role Name	Request Access	Current Access	Role Name
<input type="radio"/>	<input type="radio"/>	Personnel Approvals Full Access	<input type="radio"/>	<input type="radio"/>	Import Personnel Claims Full Access
<input type="radio"/>	<input type="radio"/>	Personnel Approvals Read Only	<input type="radio"/>	<input type="radio"/>	Import Personnel Claims Read Only

Personnel Claims (Clear)		
Request Access	Current Access	Role Name
<input type="radio"/>	<input type="radio"/>	Personnel Claims Full Access
<input type="radio"/>	<input type="radio"/>	Personnel Claims Read Only

☐ Approve
 ☐ Deny

☒ Show Audit Trail

☒ Save - Please save this request.
 ☐ Cancel - Please exit the wizard.

IEP ADMINISTRATOR ROLES

IEP Access Lists

(IEP Administrator)

- * The “Access List” is a very important component of the security system
- * An IEP administrator manages student IEP access lists by either:
 - * Adding students to user case loads; or
 - * Adding users to a student’s IEP
- * If you have a user account with limited access, such as a basic user account, you will need to have an IEP Administrator add students to your case load
- * A user has to be added to the Access List for a student to be added to *My IEP Students*, which is the case load for a user

IEP Access Lists

(IEP Administrator)

- * An IEP Administrator can add users to students' Access Lists by clicking *Search for an IEP Student* on the *Landing Page*



- * Click *My SIS Students* tab
- * *My SIS Students* represents students reported by your district(s) as having the IEP indicator checked 'Yes' in the SIS system
- * Select your district or coop in the Entity drop down
- * Click on the letter that the student's Last Name begins with
- * Click Refresh

A screenshot of a web application interface. At the top, there are three tabs: "Search", "My Students (1)", and "My SIS Students", with the last one being active. Below the tabs is a "Filters" section. It contains an "Entity:" label followed by a dropdown menu, and a "Last Name:" label followed by a row of letters from A to Z. The letter "A" is highlighted. Below the letters is a "Refresh" button.

- * Click on the students name to select

IEP Access Lists

(IEP Administrator)

- * If a student cannot be located in *My SIS Students*, then do a student search
- * To search for students, SIS ID or a combination of Last Name, First Name, DOB and Gender is required
- * Once search criteria is entered, click *Search*



The screenshot shows a web form titled "SIS Required" with a blue header bar. Below the header, there are five input fields, each followed by a red asterisk indicating it is required. The first field is "SIS ID:" with the value "999999903" entered. Below this is the word "or". The second field is "Last Name:". The third field is "First Name:". The fourth field is "DOB:" with a dropdown arrow and a red asterisk, followed by the text "MM/DD/YYYY" in red. The fifth field is "Gender:" with a dropdown arrow. At the bottom right of the form is a "Search" button, which is highlighted with a red rectangular border.

IEP Access Lists

(IEP Administrator)

- * Select the desired student by clicking the *Select* button or the select check mark in the results grid

Search My Students (1) My SIS Students

Selected Student Details


First Name: John	DOB: 1/1/1999 (14 yrs 9 mos)	SIS ID: 999999903
Middle Name: X	Gender: Female	Native Language: English
Last Name: Three	Grade: 12th	Home Language: English
Home School: Harrisburg High School	Enrollment Date:	Mother's Maiden Name:
Serving School: Norris City Annex	Exit Date:	Ethnicity: White
Exit Type:	Exit Status:	FTE:

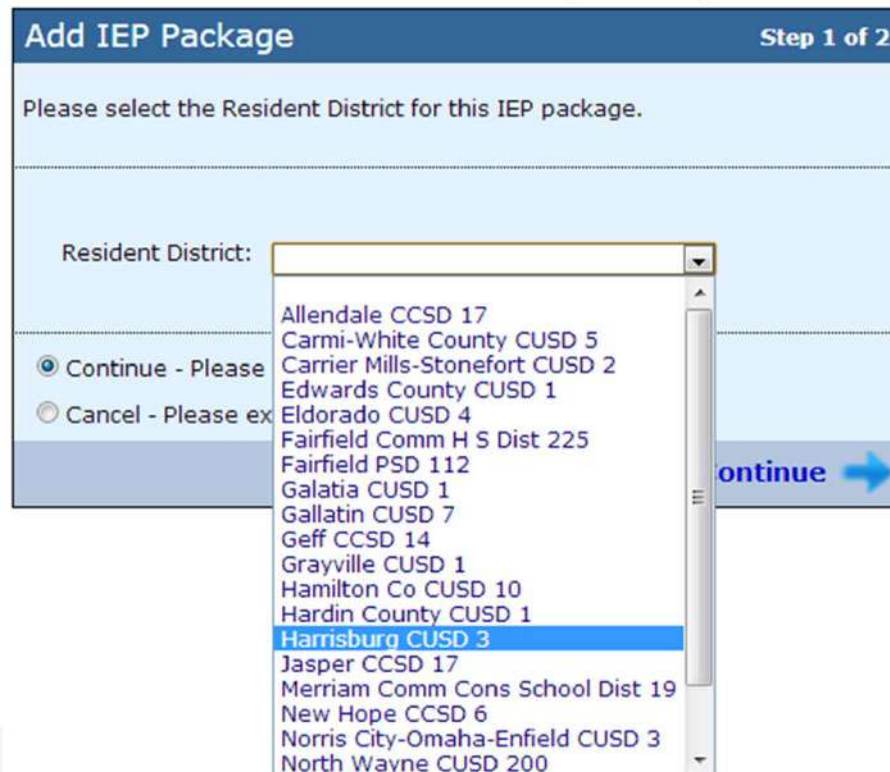
Students Search Results

View	Select	SIS Id	Name	Birthdate	Gender	Ethnicity
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	999999903	Three X John	1/1/1999	Female	White

IEP Access Lists

(IEP Administrator)

- * Click *Current/Create IEP* button to add users to a student Access List 
- * Select the Resident District for the IEP package and click *Continue*




Add IEP Package Step 1 of 2

Please select the Resident District for this IEP package.

Resident District:

- ☒ Continue - Please
- ☐ Cancel - Please ex

Continue 

Dropdown list contents:

- Allendale CCSD 17
- Carmi-White County CUSD 5
- Carrier Mills-Stonefort CUSD 2
- Edwards County CUSD 1
- Eldorado CUSD 4
- Fairfield Comm H S Dist 225
- Fairfield PSD 112
- Galatia CUSD 1
- Gallatin CUSD 7
- Geff CCSD 14
- Grayville CUSD 1
- Hamilton Co CUSD 10
- Hardin County CUSD 1
- Harrisburg CUSD 3**
- Jasper CCSD 17
- Merriam Comm Cons School Dist 19
- New Hope CCSD 6
- Norris City-Omaha-Enfield CUSD 3
- North Wayne CUSD 200

IEP Access Lists

(IEP Administrator)

- * Although the student has Parent/Guardian(s) data entered, they still have not been assigned to the case list for I-Star users. Adding I-Star users to the Access List for a Student will achieve this.
- * Click *Add Me* to add your account to the Access List or
- * Click *Add* to add additional users to the Access List or

The screenshot displays the IEP Access Lists interface. At the top left, there is a button labeled "Add me!". Below it is a table titled "Access List (+ Add)". The table has columns: Edit, Delete, Name, Entity, Interpreter, Read-Only, Notifications, and Make Forms Official. The first row of the table contains the text "No Records Found". To the right of the table is a form for adding a user. It includes fields for "First Name:" and "Last Name:", and buttons for "Cancel" and "Search". Below the table, there is a form for adding a user. It includes a "User:" field with the value "wovsed1 DistrictDoc1", and checkboxes for "Interpreter:", "Read-Only Flag:", "Receive Notifications:", and "Make Forms Official:". There are also "Add" and "Cancel" buttons. Red arrows point from the "Add" button in the bottom form to the "Add" button in the table header, and from the "Search" button in the right form to the text "Search by First Name and Last Name then click Search".

Edit	Delete	Name	Entity	Interpreter	Read-Only	Notifications	Make Forms Official
No Records Found							

User: **wovsed1 DistrictDoc1**

Interpreter: ☐

Read-Only Flag: ☐

Receive Notifications: ☒

Make Forms Official: ☒

First Name:

Last Name:

Search by First Name and Last Name then click *Search*

Address the settings and click Add (A new option will be to add a person to the Access List without making them a meeting attendee.)


Common Users

(IEP Administrators)

- * I-Star users that frequent the system can be added to the *Common Users* pool
- * Allows for quicker IEP Access List creation
- * Click *IEP Common Users* to modify the users for your district

 **IEP Common Users**
Use this quick link to modify common users for your district.

- * Click *Add* to manage the list

Common Users ( Add)

- * Search for the user by First and Last Name, then click *Search*

First Name:

Last Name:

- * Click the check mark in the *Select* column for the correct user

Select	Name
<input checked="" type="checkbox"/>	wovsed1 DistrictDoc1

Common Users (IEP Administrators)

- * The IWAS name can be located if a user clicks on the IWAS profile

Illinois State Board of Education
Gery J. Chico, Chairman Christopher A. Koch, State Superintendent

Login: WOVSEDADMIN

My Systems

Below are systems that you are either authorized to use or are awaiting authorization from either your district (Pending-District), ROE (Pending-ROE) or ISBE (Pending-ISBE). Once you are "Authorized" to access a system, simply click on the system description to use it.

[Click Here for Due Dates](#)

Categories - Click to Expand/Collapse Tree	Authorization
Reporting	
Annual	
	Authorized
	Authorized
	Authorized
	Authorized
I-Star - (Special Education)	Authorized

I-Star - (Special Education) Sign-Up

My Profile (For ALL Systems)

First Name: Wovsed

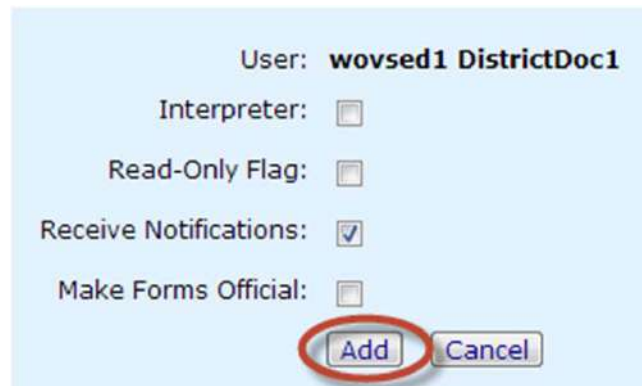
Middle Name:

Last Name: Admin

⊕ = Required

Common Users (IEP Administrators)

- * Address the 4 User options then click *Add* (A new option will be added to allow a user to have access to the IEP without being a conference attendee.)



User: **wovsed1 DistrictDoc1**

Interpreter: ☐

Read-Only Flag: ☐

Receive Notifications: ☒

Make Forms Official: ☐

Add **Cancel**

Common Users (+ Add)

- * Continue to add users by clicking *Add*

IEP Access Lists

(IEP Administrator)

- * Click the check mark in the select column under the Common Users to select

Access List (+ Add)							
Edit	Delete	Name	Entity	Interpreter	Read-Only	Notifications	Make Forms Official
		Admin, Wovsed	Wabash & Ohio Valley Sp Ed Dist	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You can select a user from the list of common user for your district.

Common Users					
Select	Name	Interpreter	Read-Only	Notifications	Make Forms Official
	DistrictDoc1, wovsed1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- * Repeat these steps until all staff that need to see this student's IEP have been added then click *Return*

IEP Access Lists (IEP Administrator)

- * The IEP Overview tab now displays all staff that have access to this student's IEP
- * When those staff members login to I-Star, this student will be in *My IEP Students* on their Landing Page

Year: **2013**
IEP Status: **Draft**
Resident District: **Harrisburg CUSD 3**
IEP Start Date:
Annual Review Date:
Evaluation Dates:
Anticipated Graduation Date:
Disabilities:

Disabilities	
Type	Disability
Primary Disability	
Secondary Disability	

Access List:

Access List (Modify)					
Name	Entity	Interpreter	Read-Only	Notifications	Make Forms Official
Admin, Wovsed	Wabash & Ohio Valley Sp Ed Dist	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DistrictDoc1, wovsed1	Norris City Annex	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

IEP Administrator Roles Summary

- * Access Levels
 - * Adds students to staff case loads
 - * Adds staff to student IEPs
- * Common Users
 - * Creates a Common User List
 - * *Common Users* access IEPs frequently (teachers, psychologists and/or other related service providers)

IEP CASE MANAGEMENT – PARENT/GUARDIAN AND STUDENT PROFILE INFORMATION

*(IEP Administrator or
Basic User)*

IEP Case Management Parent/Guardian(s) (*IEP Administrator or Basic User*)

- * Two ways to add Parent/Guardian information:
 - * Parent import, if the school district tracks the data in another system; or
 - * Manually entering the parent/guardian information into the system
- * Parent/Guardian information can be entered when creating the IEP Access List, during the IEP creation or from the Student Profile

IEP Case Management

Parent/Guardian(s)

(IEP Administrator or Basic User)

- * The Add IEP Package Wizard offers the addition of Parent/Guardian data. This is one of the two ways this data can be entered.
- * Click *Add* to Start Entering data


Current Parent/Guardian(s) (+ Add)					
Edit	Remove	Parent/Guardian	Addresses	Phones	Languages
No Records Found					

- * Evaluate the three Parent/Guardian options and select the one that applies

Add a New Parent/Guardian
The Student is His/Her Own Guardian
Search for a Sibling's Parent/Guardian

IEP Case Management Parent/Guardian(s) (IEP Administrator or Basic User)


* Enter demographic data and click *Continue*

Prefix: 


First Name: *


Middle Name:


Last Name: *

Suffix: 

Maiden Name:

Gender:  *



Birthdate:  MM/DD/YYYY

Ethnicity: 

Email:

Interpreter Needed: ☐

☒ Continue - Please continue the wizard.
☐ Cancel - Please exit the wizard.

 Cancel **Continue** 

IEP IEP Case Management Parent/Guardian(s) (IEP Administrator or Basic User)

- * To add Phone Numbers click *Add*

Phone numbers for **John X Three**

Phone Numbers (+ Add)	
Type	Number
No Records Found	

- * Enter Phone Type, Number and Extension if applicable and click *Save*

Enter the new phone number and click the Save button.

Phone Type:	<input type="text" value="Home"/>
Phone Number:	<input type="text" value="618"/> <input type="text" value="555"/> <input type="text" value="5555"/>
Extension:	<input type="text" value="555"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

- * Enter Home, Alternate, Fax and/or Mobile Phone numbers
- * Once all desired Phone data has been added, click *Continue*

IEP Case Management Parent/Guardian(s) (IEP Administrator or Basic User)

- * To add Address data click *Add*

Addresses for John X Three

Addresses + Add		
Type	Address	Invalid?
No Records Found		<input type="checkbox"/>

- * Enter Address Type, Street, City, State and Zip Code and click *Save*

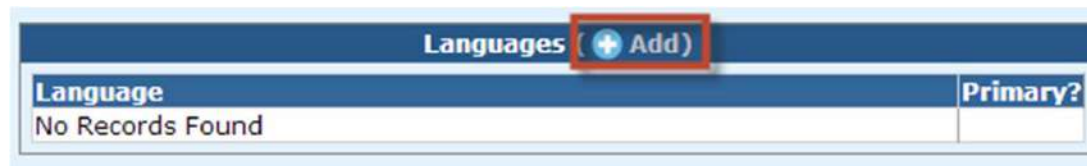
Enter the new address and click the Save button.

Type:	<input type="text" value="Home"/>
Address:	<input type="text" value="512 N. Main St."/>
City:	<input type="text" value="Harrisburg"/>
State:	<input type="text" value="Illinois"/>
Zip:	<input type="text" value="61946"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

- * Once all desired Address data has been added, click *Continue*

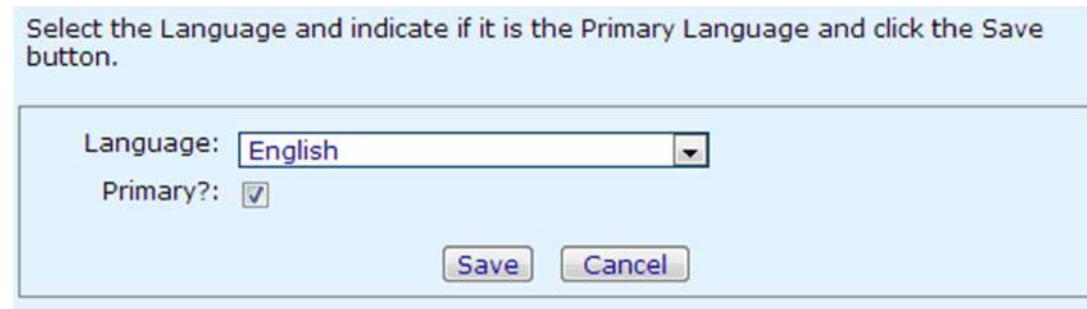
IEP Case Management Parent/Guardian(s) (IEP Administrator or Basic User)

- * To add Language data click *Add*



Language	Primary?
No Records Found	

- * Select Language from the drop down and check if Primary then click *Save*



Select the Language and indicate if it is the Primary Language and click the Save button.

Language: English

Primary?: ☒

Save Cancel

- * Once all desired Language data has been added, click *Save*

IEP Case Management

Parent/Guardian(s)

(IEP Administrator or Basic User)

- * Enter the date that the previously added Parent/Guardian began being this student's guardian (defaults to student's DOB), select the Relationship to the student and click *Save*

Please enter the date that **John X Three** began being this student's guardian.

John X Three

Begin Date: *MM/DD/YYYY

Relationship:

- * After the Parent/Guardian data is added for one person, the next addition can be quicker to add
- * To add another Parent/Guardian, click *Add*

Current Parent/Guardian(s) (+ Add)							
Edit	Remove	Parent/Guardian	Addresses		Phones		Languages
			Type	Address (Modify)	Type	Number (Modify)	Language (Modify) Primary?
		Mr. John X Three Sr. Father Begin: 1/1/1999 Interpreter Needed: <input type="checkbox"/>	Home	512 N. Main St. Harrisburg, IL 61946	Home	(618) 555-5555 Ext. 555	English <input checked="" type="checkbox"/>

IEP Case Management Parent/Guardian(s) (IEP Administrator or Basic User)

- * The steps will be the same to add additional Parent/Guardian data

- * Step 1: **Add a New Parent/Guardian**
The Student is His/Her Own Guardian
Search for a Sibling's Parent/Guardian

- * Step 2:

Prefix: Mrs. ▾
First Name: Johna
Middle Name: X
Last Name: Three
Suffix: ▾
Maiden Name: Two
Gender: Female ▾
Birthdate: 04/27/1981 MM/DD/YYYY
Ethnicity: White ▾
Email: johnaxthree@gmail.com
Interpreter Needed: ☐
Continue - Please continue the wizard.
Cancel - Please exit the wizard.
Cancel Continue

- * To enter Phone Numbers, click *Add* to add new or click the check mark to add Existing Numbers to save time

Enter the new phone number and click the Save button.

Phone Type: Home ▾
Phone Number:
Extension:
Save Cancel

You may choose a phone number from the list below. These phone numbers are from the student's own profile and any other current guardians. Please note, when selecting a phone number below it will be a copy. This means any future changes to one of the phone numbers will not be reflected everywhere the phone number is used.

Existing Phone Numbers	
Select	Phone Number
✓	(618) 555-5555 Ext. 555 (Home)

IEP Case Management

Parent/Guardian(s)

(IEP Administrator or Basic User)

- * To Add Address data, click *Add* or click the Select check mark to add an existing address then click *Continue*

Addresses for **Johna X Three**

Addresses + Add		
Type	Address	Invalid?
No Records Found		<input type="checkbox"/>

You may choose an address from the list below. These addresses are from the student's own profile and any other current guardians. Please note, when selecting an address below it will be a copy. This means any future changes to one of the addresses will not be reflected everywhere the address is used.

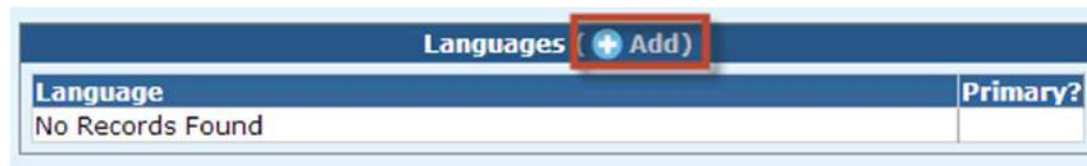
Existing Addresses	
Select	Address
<input checked="" type="checkbox"/>	512 N. Main St. Harrisburg , IL 61946 (Home Address)

☒ Continue - Please continue the wizard.
☐ Cancel - Please exit the wizard.

← Previous Cancel Continue →

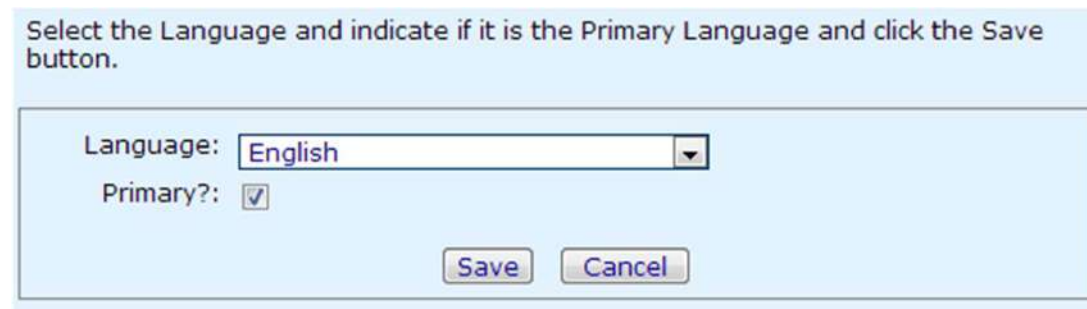
IEP Case Management Parent/Guardian(s) (IEP Administrator or Basic User)

- * To add Language data click *Add*



The screenshot shows a table titled 'Languages' with a blue header bar. In the header bar, the word 'Languages' is followed by a button with a plus sign and the text 'Add'. Below the header, the table has two columns: 'Language' and 'Primary?'. The first row of the table contains the text 'No Records Found' in the 'Language' column and is empty in the 'Primary?' column.

- * Select Language from the drop down and check if Primary then click *Save*



The screenshot shows a form with the instruction: 'Select the Language and indicate if it is the Primary Language and click the Save button.' Below the instruction, there is a 'Language:' label followed by a dropdown menu showing 'English'. Below that is a 'Primary?:' label followed by a checked checkbox. At the bottom of the form are two buttons: 'Save' and 'Cancel'.

- * Once all desired Language data has been added, click *Save*

IEP Case Management

Parent/Guardian(s)

(IEP Administrator or Basic User)

- * Enter the date that the previously added Parent/Guardian began being this student's guardian (defaults to student's DOB), select the Relationship to the student and click *Save*

Please enter the date that **Johna X Three** began being this student's guardian.

Johna X Three

Begin Date: *MM/DD/YYYY

Relationship:

- * Additional Parent/Guardian(s) data can be entered if desired
- * Once all additions are complete, click *Continue*

Current Parent/Guardian(s) (+ Add)							
Edit	Remove	Parent/Guardian	Addresses		Phones		Languages
			Type	Address (Modify)	Type	Number (Modify)	Language (Modify) Primary?
		Mr. John X Three Sr. Father Begin: 1/1/1999 Interpreter Needed: <input type="checkbox"/>	Home	512 N. Main St. Harrisburg , IL 61946	Home	(618) 555-5555 Ext. 555	English <input checked="" type="checkbox"/>
		Mrs. Johna X Three Mother Begin: 1/1/1999 Interpreter Needed: <input type="checkbox"/>	Home	512 N. Main St. Harrisburg , IL 61946	Home	(618) 555-5555 Ext. 555	English <input checked="" type="checkbox"/>

IEP Case Management Student Profile

(IEP Administrator or Basic User)

- * Setting up Parent/Guardian(s) data can be done as previously demonstrated during the IEP creation OR it can be done from the Student Profile page
- * The process for adding Parent/Guardian(s) data will be the same process regardless of which avenue chosen

Profile | Current/Create IEP | Archived IEPs | Activity Log

Students: John X One | SIS ID: 999999901 | DOB: 1/1/1999 (14 yrs 10 mos)

Student Profile

Name: John X One
SIS ID: 999999901
Natural Language: English
Home Language: English
Primary:
Secondary:
Home School: Harrisburg High School
Serving School: Learning Alt Branch Harrisburg
Gender: Female
Birthdate: 1/1/1999
Ethnicity: White

Type	Number
Home	(555) 555-5555

Type	Address	Invalid?
Home	120 Pankavilla Lane Harrisburg, IL 62946	<input type="checkbox"/>

Parents/Guardians (Modify)

Name: Mrs. Johnna X One
Type: Parent
Gender: Female
Birthdate:
Ethnicity:

Language	Primary?
English	<input checked="" type="checkbox"/>

Type	Number
Home	(555) 555-5555
Work	(123) 456-7890
Mobile	(618) 252-6818

Type	Address	Invalid?
Home	120 Pankavilla Lane Harrisburg, IL 62946	<input type="checkbox"/>

Name: Mr. James X One
Type: Parent
Gender: Male
Birthdate:
Ethnicity:

Language	Primary?
English	<input checked="" type="checkbox"/>

Type	Number
Home	(555) 555-5555

Type	Address	Invalid?
Home	120 Pankavilla Lane Harrisburg, IL 62946	<input type="checkbox"/>

IEP Case Management Student Profile

(IEP Administrator or Basic User)

- * Student data will need to be added from the Student Profile page
- * To add student data, click *Modify*



The screenshot shows two data entry sections. The top section is titled 'Phone Numbers' and has a 'Modify' button with a wrench icon highlighted by a red box. Below the title is a table with two columns: 'Type' and 'Number'. The first row of the table contains the text 'No Records Found'. The bottom section is titled 'Addresses' and also has a 'Modify' button with a wrench icon highlighted by a red box. Below the title is a table with three columns: 'Type', 'Address', and 'Invalid?'. The first row of the table contains the text 'No Records Found' and an unchecked checkbox in the 'Invalid?' column.

Phone Numbers (Modify)	
Type	Number
No Records Found	

Addresses (Modify)		
Type	Address	Invalid?
No Records Found		<input type="checkbox"/>

- * The data is entered as previous for Parent/Guardian(s) with the option to choose from existing data entered to save time

IEP CASE MANAGEMENT - CREATE AN IEP

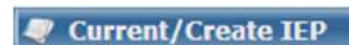
IEP Case Management

Create an IEP

- * From the Landing page, click on the student that you would like to create an IEP for in *My IEP Students*

My IEP Students			
SISID	Name	Birthdate	Home School
999999904	John X Four	01/01/1999	Harrisburg High School
(Page 1 of 1) Page 1 Items Per Page 20			
View All			

- * Click *Current/Create IEP* button
- * Enter the Purpose for visiting the IEP then click *Save*



Purpose for IEP Activity

You must enter a reason why you are visiting the IEP at this time.

Purpose of Visit:

Notes:

Schedule/Manage Meetings
Draft/Create the IEP
Review/Print the IEP
Create Official Amendment
Other (Explain)

IEP Case Management

Create an IEP

IEP Toolbar



IEP Case Management

Create an IEP

- * To begin the IEP process, click *Add Form* to manually add all forms or click *Setup a Conference* for a wizard that creates the Notification of Conference and Conference Summary



IEP Case Management

Create an IEP

- * Step 1: Enter the form date and the purpose of the conference then click *Continue*

Form Date: 10/18/2013 *MM/DD/YYYY

Purpose of Conference (Clear)

Select	Purpose
<input type="checkbox"/>	Review of Existing Data - Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation.
<input type="checkbox"/>	Initial Evaluation/Eligibility - Review your child's recent evaluation to determine initial eligibility for special education and related services.
<input type="checkbox"/>	Reevaluation - Review your child's recent evaluation to determine (reconsider or change) continued eligibility for special education and related services.
<input type="checkbox"/>	Initial IEP - Review your child's need for special education and related services and placement and develop an initial IEP.
<input type="checkbox"/>	IEP Review and Revision - Review and/or revise your child's IEP to determine special education and related services and placement.
<input type="checkbox"/>	Secondary Transition - Consider postsecondary goals and transition services (beginning at age 14 1/2).
<input type="checkbox"/>	FBA/BIP - Consider the need for a functional behavioral assessment for your child and a need to create or revise a behavioral intervention plan.
<input type="checkbox"/>	MDR - Consider relatedness of your child's disability to a disciplinary code violation(s).
<input type="checkbox"/>	Graduation - Review your child's anticipated date of graduation.
<input type="checkbox"/>	Other - (e.g. Termination of Placement, Aging Out) :

☒ Show Audit Trail

☒ Continue - Please continue the wizard.
☐ Cancel - Please exit the wizard.

Cancel Continue

IEP Case Management

Create an IEP

- * Step 2: Enter the meeting date and edit any of the pre-populated fields
 - * Click *Add* beside Address to add commonly used Rooms and Addresses for future use to save time
 - * Click *Continue* when meeting information complete

Please enter the information regarding the time and place of this conference.

[Spell Check](#)

Subject:

Date: *MM/DD/YYYY

Time: to *

Details:

Local Room:

Address:

City:

State:

Zip:

Invalid?: ☐

[Save](#) [Cancel](#)

Populated automatically from Step 1 selection

Rooms and Addresses you commonly use		
	Location	Address
✓	Meeting Room A	
✓	201	

☒ Show Audit Trail

[Spell Check](#)

☒ Continue - Please continue the wizard.

☐ Cancel - Please exit the wizard.

[Previous](#) [Cancel](#) [Continue](#)

IEP Case Management

Create an IEP

- * Step 3: Verify and/or edit Parent/Guardian(s) data then click *Continue*

IEP Conference Setup
Step 3 of 6

You may add and remove the student's guardians using this wizard. You may also add and remove parents using this wizard. You also have the ability to select from historical guardians associated with this student.

Current Parent/Guardian(s)
[+ Add](#)

		Parent/Guardian	Addresses	Phones	Languages			
Edit	Remove		Type	Address (Modify)	Type	Number (Modify)	Language (Modify)	Primary?
		Mrs. Johnna X One Mother Begin: 1/1/1999 Interpreter Needed: <input type="checkbox"/>	Home	120 Pankavilla Lane Harrisburg, IL 62946	Home	(555) 555-5555	English	<input checked="" type="checkbox"/>
					Work	(123) 456-7890		
					Mobile	(618) 252-6818		
		Mr. James X One Father Begin: 1/1/1999 Interpreter Needed: <input type="checkbox"/>	Home	120 Pankavilla Lane Harrisburg, IL 62946	Home	(555) 555-5555	English	<input checked="" type="checkbox"/>

You may select guardians from the Historical Guardians list below for this student.

Historical Guardian(s)

Relationship	Name	Begin Date	End Date
No Records Found			

Note: You may not add, edit, remove or select surrogate parents. Surrogates may only be assigned by ISBE staff and are shown here for informational purposes only.

☒ Show Audit Trail

☒ Continue - Please continue the wizard.
☐ Cancel - Please exit the wizard.

[← Previous](#)
 Cancel
[Continue →](#)

IEP Case Management

Create an IEP







- * Step 4: Verify, Remove, Excuse, Add and/or Edit Conference Attendees data then click *Continue*

Conference Attendees (+ Add)							
Remove/Excuse	Contact Attempts	Name	Type	Excused	Interpreter Needed	Languages	
	None listed.	One, Johnna X	Parent	<input type="checkbox"/>	<input type="checkbox"/>	English	Primary? <input checked="" type="checkbox"/>
	None listed.	One, James X	Parent	<input type="checkbox"/>	<input type="checkbox"/>	English	Primary? <input checked="" type="checkbox"/>
		Admin, Wovsed		<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>
		DistrictDoc1, wovsed1		<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>
		Supereducator, Roy X	LEA Representative	<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>
		Greatteacher, Robert T	Special Education Teacher	<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>

IEP Case Management

Create an IEP

* Click the pencil icon in the *Contact Attempts* column to log contact attempts

Conference Attendees (+ Add)							
Remove/ Excuse	Contact Attempts	Name	Type	Excused	Interpreter Needed	Languages	
✗	 None listed.	One, Johnna X	Parent	<input type="checkbox"/>	<input type="checkbox"/>	English	Primary? <input checked="" type="checkbox"/>
✗	 None listed.	One, James X	Parent	<input type="checkbox"/>	<input type="checkbox"/>	English	Primary? <input checked="" type="checkbox"/>
✗		Admin, Wovsed		<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>
✗		DistrictDoc1, wovsed1		<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>
✗		Supereducator, Roy X	 LEA Representative	<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>
✗		Greatteacher, Robert T	 Special Education Teacher	<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>

IEP Case Management

Create an IEP

- * Enter the attempts to contact the guardian, click check mark in *Selected* column to apply attempts to the other guardian(s) then click *Save*

Parent/Guardian Contact Attempts

Step 1 of 1

Please enter all the attempts to contact the guardian prior to the IEP meeting.

[Spell Check](#)

Guardian Name: **One, Johnna X**

Please enter all attempts to contact this guardian below.

Apply these contacts to the following guardians as well.

Selected	Guardian Name
<input checked="" type="checkbox"/>	Mr. James X One

[Spell Check](#)

☒ Save - Please save the attempts to contact the parent/guardian.
☐ Cancel - Please exit the wizard.

Save

IEP Case Management

Create an IEP

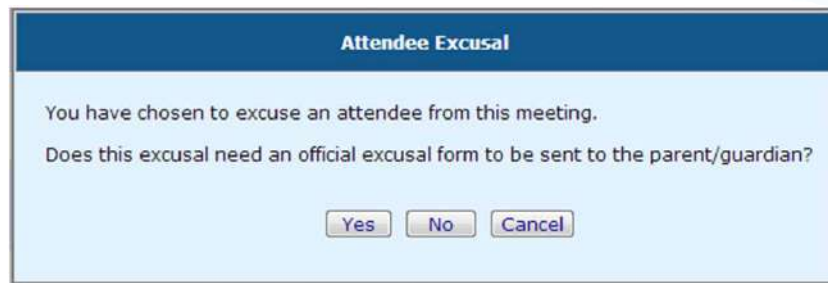
* Click the red X in the *Remove/Excuse* column to remove or excuse an attendee

Conference Attendees (+ Add)							
Remove/ Excuse	Contact Attempts	Name	Type	Excused	Interpreter Needed	Languages	
	None listed.	One, Johnna X	Parent	<input type="checkbox"/>	<input type="checkbox"/>	English	Primary? <input checked="" type="checkbox"/>
	None listed.	One, James X	Parent	<input type="checkbox"/>	<input type="checkbox"/>	English	Primary? <input checked="" type="checkbox"/>
		Admin, Wovsed		<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>
		DistrictDoc1, wovsed1		<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>
		Supereducator, Roy X	LEA Representative	<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>
		Greatteacher, Robert T	Special Education Teacher	<input type="checkbox"/>	<input type="checkbox"/>	No Records Found	Primary? <input type="checkbox"/>

IEP Case Management

Create an IEP

- * Decide if an official excusal needs to be sent to the parent/guardian and answer appropriately

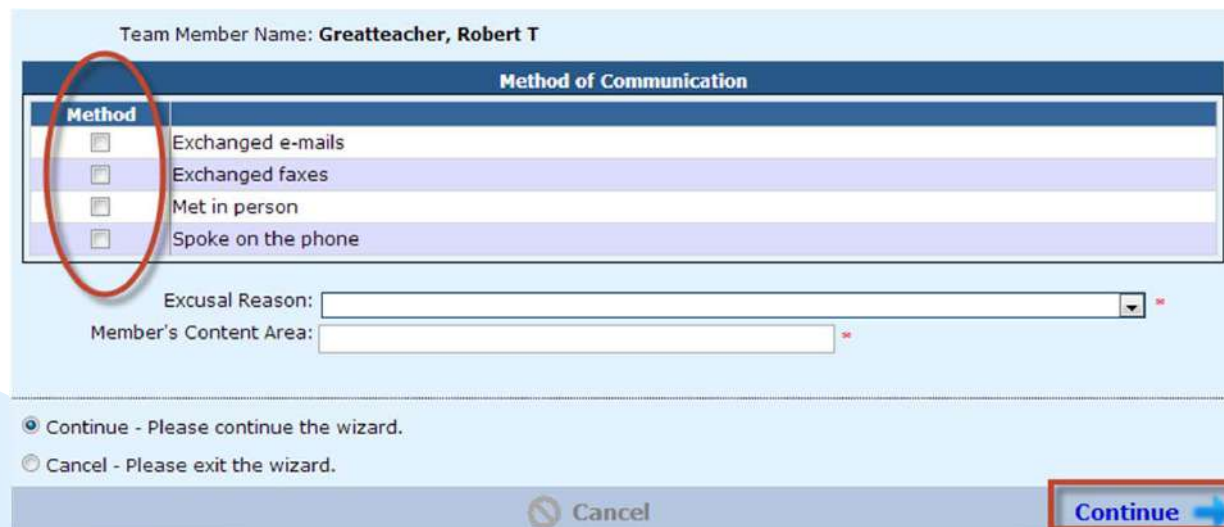


Attendee Excusal

You have chosen to excuse an attendee from this meeting.

Does this excusal need an official excusal form to be sent to the parent/guardian?

- * If Yes, enter the Method of Communication, select an excusal reason and enter the member's content area then click *Continue*



Team Member Name: **Greatteacher, Robert T**

Method of Communication	
Method	
<input type="checkbox"/>	Exchanged e-mails
<input type="checkbox"/>	Exchanged faxes
<input type="checkbox"/>	Met in person
<input type="checkbox"/>	Spoke on the phone

Excusal Reason:

Member's Content Area:

☒ Continue - Please continue the wizard.
☐ Cancel - Please exit the wizard.

IEP Case Management

Create an IEP

* Verify and/or edit Contact List and click *Save*

Form Contact List (Modify) (Clear)

Contact	Sincerely	Personnel	Title(s)	Type	Phone(s)
<input checked="" type="radio"/>	<input type="radio"/>	Johnny Smith	Title (Modify) Principal	Type Mobile	Number (Modify) (217) 622-5555
<input type="radio"/>	<input checked="" type="radio"/>	Susan Bestteacher	Title (Modify) Special Education Teacher	Type Home	Number (Modify) (618) 555-1212 Ext. 12

Show Audit Trail

☒ Save - Please save the team member excusal.
☐ Cancel - Please exit the wizard.

Previous Cancel Save

* Once the Conference Attendees wizard is complete, click *Return*

IEP Case Management

Create an IEP

* Step 5: Enter applicable Conference Summary data and click *Continue*

IEP Conference Setup

Step 5 of 6

You are entering information for the Conference Summary form if known at this time. You will be able to update this later.

Conference Information

These dates are determined from the date on official eligibility forms if any or from the date provided by you in the process of entering disabilities without having to do the eligibility forms.

Date of Most Recent Evaluation: MM/DD/YYYY

Date of Next ReEvaluation: MM/DD/YYYY

Student Information

Anticipated Date of High School Graduation: 8/7/2013 MM/DD/YYYY

Medicaid Number:

Procedural Safeguards

Explanation of Procedural Safeguards were provided to/reviewed with the parent(s) on: MM/DD/YYYY

Transfer of Rights - Seventeen-year old student informed of his/her rights that will transfer to the student upon reaching age 18.
☐ YES
☒ NA

Parent(s) were given a copy of the:
☐ Evaluation report and eligibility determination
☐ IEP
☐ District's behavioral intervention policy
☐ District's behavioral intervention procedure

Placement is read-only in this location. Placement will be considered as a part of Form 37-44 Q, Educational Services and Placement.

Placement

FTE	Serving School/Facility
No Records Found	

☒ Show Audit Trail

☒ Continue - Please continue the wizard.
☐ Cancel - Please exit the wizard.

Placement is populated by Educational Placement and Services automatically

IEP Case Management

Create an IEP

* Step 6: Verify, Modify and/or Add the Form Contact List

* Note: To add personnel to this list, search District or IEIN



Multiple OR Single

District:

Last Name:

First Name:

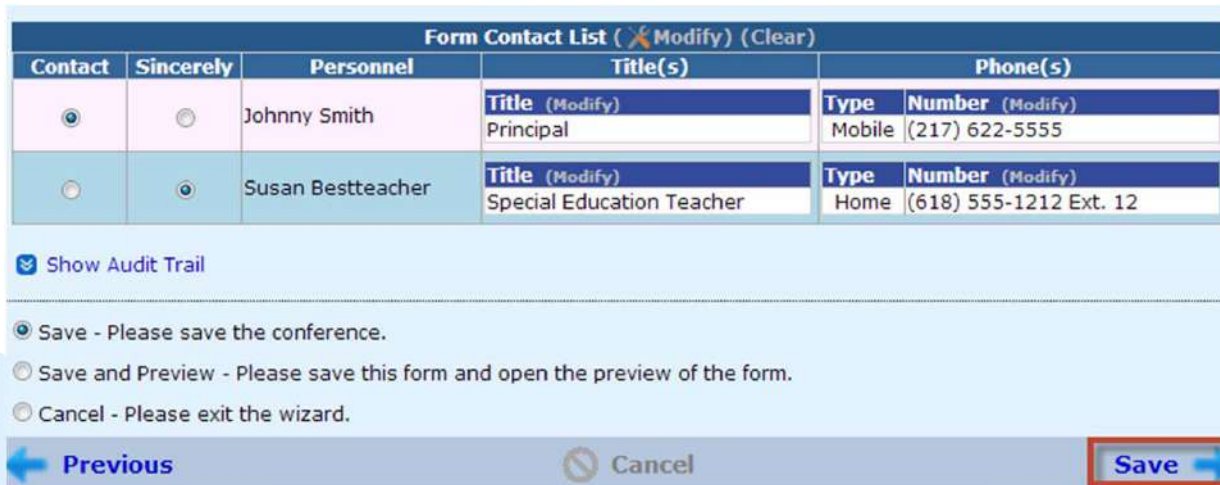
Gender:

Include Retired ☐

Search Clear Search Cancel

Note: You must supply District, IEIN or SSN to search for teachers that you have never created an approval record for in the past.

* Once the Form Contact List is complete, click Save



Contact	Sincerely	Personnel	Title(s)	Type	Number
<input checked="" type="radio"/>	<input type="radio"/>	Johnny Smith	Title (Modify) Principal	Mobile	(217) 622-5555
<input type="radio"/>	<input checked="" type="radio"/>	Susan Bestteacher	Title (Modify) Special Education Teacher	Home	(618) 555-1212 Ext. 12

Show Audit Trail

☒ Save - Please save the conference.

☐ Save and Preview - Please save this form and open the preview of the form.

☐ Cancel - Please exit the wizard.

Previous Cancel **Save**

IEP Case Management

Create an IEP

- * To view the results of the Setup a Conference wizard, click *IEP Timeline*
- * Click the double vertical arrow to expand the forms associated with the conference

The screenshot displays the IEP Case Management software interface. At the top, a navigation bar includes tabs for IEP Overview, IEP Timeline (highlighted with a red box), IEP Forms, Notice and Consent Forms, Eligibility Forms, Print History, Activity Log, and Attachments. Below the navigation bar, a secondary bar contains buttons for Add Form, Print IEP, Setup a Conference, Create an Amendment, Annual Review, and Reevaluation. The main content area is titled "IEP Conference" and contains a list of actions on the left (Edit Meeting, Meeting Attendees, Print Meeting Forms, Print Meeting Attendees, Add Form to Meeting, Make Meeting Official) and a details section on the right. The details section shows the following information:

- Conference: **Conference to discuss John X One's IEP.**
- Purpose: **Review your child's need for special education and related services and placement and develop an initial IEP.**
- Date: **10/31/2013 7:30:00 AM**
- Location: **Meeting Room A**
- Attendee Count: **4**
- Form Count: **2**
- Cancelled: **No**
- Details: **Review the child's need for special education and related services and placement and develop an initial IEP.**

Below the details section, a button with a double vertical arrow icon is circled in red, with the text "Click Here to Hide All the Forms Associated with the Meeting". Below this button, two form entries are listed:

- Form: **Form 37-44: Conference Summary**
Date: **10/31/2013**
Status: **Draft**
Update Info: **Admin, Wovsed - 10/18/2013 11:52:19 AM**
- Form: **Form 34-57d: Notification of Conference**
Date: **10/18/2013**
Status: **Draft**
Update Info: **Admin, Wovsed - 10/18/2013 11:52:19 AM**

IEP Case Management

Create an IEP

IEP Timeline Conference Tools

The screenshot displays the IEP Case Management system interface. At the top, there are tabs for "Notice and Consent Forms", "Eligibility Forms", and "Print". Below these, a sidebar on the left contains a list of actions: "Edit Meeting", "Meeting Attendees", "Print Meeting Forms", "Print Meeting Attendees", "Add Form to Meeting", and "Make Meeting Official". The main content area shows details for a meeting, including the purpose "Review your child's recent evaluation to related services.", the date "10/7/2013 7:30:00 AM", and the location "Meeting Room A".

Callouts explaining the tools:

- Print all IEP, Notice and Consent and/or Eligibility forms associated with this meeting** (points to the "Print Meeting Forms" button)
- Edit conference information, such as purpose and/or date** (points to the "Edit Meeting" button)
- Edit meeting attendees (enter attempts to contact and/or excusals)** (points to the "Meeting Attendees" button)
- Print All meeting attendees** (points to the "Print Meeting Attendees" button)
- Add a form to the meeting** (points to the "Add Form to Meeting" button)
- Prompts edit checks to the IEP in order to make the meeting official** (points to the "Make Meeting Official" button)

IEP Case Management

Create an IEP

* Add desired forms to IEP using *Add Form to Meeting*

IEP Conference

[Edit Meeting](#) [Meeting Attendees](#) [Print Meeting Forms](#) [Print Meeting Attendees](#) [Add Form to Meeting](#) [Make Meeting Official](#)

Conference: **Conference to discuss John X One's IEP.**
Purpose: **Review your child's need for special education and related services and placement and develop an initial IEP.**
Date: **10/31/2013 7:30:00 AM**
Location: **Meeting Room A**
Attendee Count: **4**
Form Count: **2**
Cancelled: **No**
Details: Review the child's need for special education and related services and placement and develop an initial IEP.

[Click Here to Hide All the Forms Associated with the Meeting](#)

Edit Form Delete Form Make Form Official Print Form Form Activity Log	Form: Form 37-44: Conference Summary Date: 10/31/2013 Status: Draft Update Info: Admin, Wovsed - 10/18/2013 11:52:19 AM
Edit Form Delete Form Make Form Official Print Form Form Activity Log	Form: Form 34-57d: Notification of Conference Date: 10/18/2013 Status: Draft Update Info: Admin, Wovsed - 10/18/2013 11:52:19 AM

IEP Case Management

Create an IEP

* Click on the desired form name to add it to the meeting

Add a Form Step 1

Please select the form you wish to add.

IEP Forms | Notice and Consent Forms | Eligibility Forms

Select the Form

Started	IEP Forms	Name
	Data Chart	Form 37-44f
	Present Levels of Academic Achievement and Functional Performance	Form 37-44g
	Secondary Transition	Form 37-44h
	Functional Behavioral Assessment	Form 37-44j
	Behavioral Intervention Plan	Form 37-44k and Form 37-44l
	Goals and Objectives	Form 37-44m
	Educational Accommodations and Support	Form 37-44n
	Assessment	Form 37-44o
	Educational Services and Placement	Form 37-44p
★	Educational Services and Placement (Page 2)	Form 37-44q
	Manifestation Determination	Form 37-44r
	Additional Notes/Information	Form 37-44s

Return ➔

IEP, Notice and Consent
and/or Eligibility Forms
can be added

Indicates
this form
has been
started

IEP CASE MANAGEMENT - PRESENT LEVELS OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE

IEP Case Management

Present Levels of Academic Achievement and Functional Performance

- * Click *Add* for each deficient area under Academic Achievement and Functional Performance

Student's Present Level of Academic Achievement (Include strengths and areas needing improvement)

Academic Achievement (+ Add)		
Actions	Area	Remarks
No Records Found		

Student's Present Levels of Functional Performance (Include strengths and areas needing improvement)

Functional Performance (+ Add)		
Actions	Area	Remarks
No Records Found		

☒ Show Audit Trail

Spell Check

IEP Case Management

Present Levels of Academic Achievement and Functional Performance

- * Enter the Academic Performance Area and Remarks then click *Save*

Academic Achievement Step 2 of 3

Complete this page after an initial evaluation, reevaluation, or review of an independent or outside evaluation. If prior to the meeting the parent(s) obtained an independent or outside evaluation, the team must document consideration of the evaluation.

[Spell Check](#)

Academic Performance (Current or past academic achievement data pertinent to current educational performance.)

Area:

Remarks:

[Save](#) [Cancel](#)

☒ Show Audit Trail





[Spell Check](#)

IEP Case Management





Present Levels of Academic Achievement and Functional Performance


- * After strengths and areas of improvement have been added for Academic Achievement and Functional Performance, utilize the *Spell Check* button if needed then click *Continue*


Student's Present Level of Academic Achievement (Include strengths and areas needing improvement)

Academic Achievement (+ Add)		
Actions	Area	Remarks
 	Reading Comprehension	John struggles with reading comprehension when questions or discussions move beyond literal or factual information presented in a text. He is currently working at 31.2% accuracy when answering inferential comprehension questions. AIMSweb Assments which are given twice monthly reveal that John is currently able to choose 15 correct words with 2 errors on a 3-minute closed MAZW passage. 17 is the target score for the winter benchmark for the 25th percentile. He was below standards on the Spring 2012 ISAT and ThinkLink Test A results indicate that John's overall proficiency level is 1. He was at level 1 int he reporting categories of Literature, Information, Writing and level 3 in the category of Language.
 	Written Expression	John understands the use of writing conventions such as capitalization and end marks. He is able to use a graphic organizer to generate ideas and srite simple, grammatically correct sentences. However, he has difficulty writing compound sentences without prompting and cannot generate answers to written comprehension questions without prompting. His current scores on the AIMSweb Written Expression Curriculum-Based Measurement are 15 total words written (TWW), 14 correct writing sequences (CWS) and 15 Words Spelled Correctly (WSC). These scores indicate that John is working well below what is expected. Emerging for total word written is 39-48, correct writing sequence is 32-43 and words spelled correctly is 37-47.

Student's Present Levels of Functional Performance (Include strengths and areas needing improvement)




Functional Performance (+ Add)		
Actions	Area	Remarks
 	Social Emotional	John has been diagnosed with high functioning autism. As a result, John has difficulty communicating with teachers and peers and picking up social cues.
 	Independent Functioning	John needs some redirection and prompting for reading comprehension and written expression.

 Show Audit Trail

 Spell Check

☒ Continue - Please continue the wizard.

☐ Cancel - Please exit the wizard.

 Previous  Cancel  Continue

IEP Case Management

Present Levels of Academic Achievement and Functional Performance

- * Enter remarks for the Student's Strengths, Parental Educational Concerns/Input, and the effect of the disability on involvement and progress

When completing this page include all areas that are impacted by the student's disability(s). The present levels of academic achievement and functional performance should be descriptive statements addressing both areas and showing a relationship to the Illinois Learning Standards.

[Spell Check](#)

Present Levels of Academic Achievement and Functional Performance	
	Remarks
Student's Strengths	<p>John is personable at times and is a polite young man. He has strong spelling, handwriting, and math calculation skills. John likes to demonstrate humor by sharing 'laffy' jokes. John stated that he is good at patterns, handwriting, puzzles. Mom stated that he is polite and likes joke books at home. Nice manners demonstrated throughout the school and with staff. Classroom teacher states that his handwriting is especially clear and legible.</p>
Parental Educational Concerns / Input	<p>John's parents have expressed concern with his transition to the high school setting. Mom expressed concern/questioned the continued level of support staff at the high school level.</p>
<p>Describe the effect of this individual's disability on involvement and progress in the general education curriculum and the functional implications of the student's skills.</p> <ul style="list-style-type: none">* For a preschool child, describe the effect of this individual's disability on involvement in appropriate activities.* By age 14 1/2, describe the effect of this individual's disability on the pursuit of post-secondary expectations (living, learning, and working).	
	<p>John is prepared for class with needed materials and writes in his agenda on a daily basis. John requires prompting when working within algebra and language arts classrooms. He struggles with homework completion and showing required work in math. John works well in a small group setting and gets along with peers he is familiar with. He sometimes has difficulty responding to questions to directives in an appropriate manner.</p>

☒ Show Audit Trail

[Spell Check](#)

☒ Save - Please save this form.

☐ Save and Preview - Please save this form and open the preview of the form.

☐ Cancel - Please exit the wizard.

[Previous](#) [Cancel](#) [Save](#)

IEP CASE MANAGEMENT - GOALS AND OBJECTIVES / BENCHMARKS

IEP Case Management Goals and Objectives/Benchmarks

* Click *Add* to enter Goals and Objectives/Benchmarks

Goals and Objectives / Benchmarks (+ Add)				
Edit	Delete	Goal Number	Goal Statement	Objectives
No Records Found				

* Type in the Goal Statement, select the Learning Standard Type and enter the Standard #.

Goal Details	
Goal Statement:	<div>In order to prepare John for post-secondary living skills and employment in his chosen field, he will complete reading activities related to drawing conclusions and making inferences with 70% accuracy.</div>
Learning Standard Type	
<div><input type="radio"/> Common Core State Standard (Math and English Language Arts)</div> <div><input checked="" type="radio"/> Illinois Learning Standard</div> <div><input type="radio"/> Other (Transition Only)</div>	
Standard #:	<div>CC K-12 RR1</div>

IEP Case Management

Goals and Objectives/Benchmarks

- * The goal area language can be imported from the Present Levels of Academic Achievement and Functional Performance form

Goal Details

Goal Statement: In order to prepare John for post-secondary living skills and employment in his chosen field, he will complete reading activities related to drawing conclusions and making inferences with 70% accuracy.

Learning Standard Type

☐ Common Core State Standard (Math and English Language Arts)
☒ Illinois Learning Standard
☐ Other (Transition Only)
 Standard #: CC K-12 RR1

Goal Area

☒ Academic ☐ Functional ☐ Other (Transition Only)
☐ Transition ☐ ESY

Academic Achievement Present Levels

Select the text you would like to import into the Current Academic Achievement and Functional Performance section for this goal. Press the "Import This Text" button and selected text will appear in the box below. You may then edit or type in any additional information.

Selected	Area	Description
<input checked="" type="checkbox"/>	Reading Comprehension	John struggles with reading comprehension when questions or discussions move beyond literal or factual information presented in a text. He is currently working at 31.2% accuracy when answering inferential comprehension questions. AIMSweb Assessments which are given twice monthly reveal that John is currently able to choose 15 correct words with 2 errors on a 3-minute closed MAZW passage. 17 is the target score for the winter benchmark for the 25th percentile. He was below standards on the Spring 2012 ISAT and ThinkLink Test A results indicate that John's overall proficiency level is 1. He was at level 1 in the reporting categories of Literature, Information, Writing and level 3 in the category of Language.
<input type="checkbox"/>	Written Expression	John understands the use of writing conventions such as capitalization and end marks. He is able to use a graphic organizer to generate ideas and write simple, grammatically correct sentences. However, he has difficulty writing compound sentences without prompting and cannot generate answers to written comprehension questions without prompting. His current scores on the AIMSweb Written Expression Curriculum-Based Measurement are 15 total words written (TWW), 14 correct writing sequences (CWS) and 15 Words Spelled Correctly (WSC). These scores indicate that John is working well below what is expected. Emerging for total word written is 39-48, correct writing sequence is 32-43 and words spelled correctly is 37-47.

Please note that importing this text will replace all text currently in the Current Academic Achievement and Functional Performance text box.

Import This Text

IEP Case Management Goals and Objectives/Benchmarks

- * Click *Add* to select the Goal Implementer(s)

Title(s) of Goal Implementer(s) (+ Add)	
Delete	Title
No Records Found	

- * Select the Title from the drop down and click *Save*. Repeat until all implementers have been added.

Goals and Objectives Step 2 of 2

You may add, edit and delete multiple goals using this wizard. You will be able to setup the objectives for each goal after you create the goals.

Title:

☒ Show Audit Trail

- Case Manager
- Director of Special Education - Cooperative
- Director of Special Education - District
- General Education Teacher
- Guidance Counselor
- Interpreter
- LEA Representative
- Occupational Therapist
- Other
- Paraprofessional/Teacher Aide
- Physical Therapist
- Principal
- School Nurse
- School Psychologist
- School Psychologist Intern
- School Social Worker
- School Social Worker Intern
- Special Education Coordinator/Supervisor
- Special Education Department Head
- Special Education Teacher

IEP Case Management Goals and Objectives/Benchmarks

* Select the type of reporting for goals and click *Save*

Reporting on Goals	
Relevant	Reporting Method
<input type="checkbox"/>	Report Card
<input checked="" type="checkbox"/>	Progress Reports
<input type="checkbox"/>	Parent Conference
<input type="checkbox"/>	Other (specify) <input type="text"/>

* Click *Modify* to add Short-Term Objectives/Benchmarks

Objectives
Short-Term Objectives / Benchmarks (<input type="button" value="✕ Modify"/>)
Objective
No Records Found

* Click *Add*

Short-Term Objectives/Benchmarks (<input type="button" value="⊕ Add"/>)		
Edit	Delete	Objective
No Records Found		

IEP Case Management

Goals and Objectives/Benchmarks







- * Enter the Short-Term Objective/Benchmark text, Evaluation Criteria, Evaluation procedures and Schedule for Determining for the Goal Statement and click *Save*. Repeat this process as necessary.

Goal Statement		
In order to prepare John for post-secondary living skills and employment in his chosen field, he will complete reading activities related to drawing conclusions and making inferences with 70% accuracy.		
Short-Term Objective/Benchmark		
Given a curriculum-based assessment, John will answer questions related to drawing conclusions and making inferences with 50% accuracy.		
Evaluation Criteria	Evaluation Procedures	Schedule for Determining
Successful Attempts: <input type="text"/> Total Attempts: <input type="text"/> <input type="button" value="Calculate"/> Percent Accuracy: <input type="text"/> % <input checked="" type="checkbox"/> Other (specify) <input type="text" value="3/4 attempts"/>	<input type="checkbox"/> Observation Log <input checked="" type="checkbox"/> Data Charts <input type="checkbox"/> Tests <input type="checkbox"/> Other (specify) <input type="text"/>	<input type="text" value="Quarterly"/> If Other, (specify) <input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		



IEP Case Management

Goals and Objectives/Benchmarks

- * Once all the Short-Term Objectives/Benchmarks have been entered, click *Return to Goals* to add more Goal Statements.

Short-Term Objectives/Benchmarks (+ Add)		
Edit	Delete	Objective
		Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m
		Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m
		Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m

☒ Show Audit Trail

 Cancel **Return to Goals** 

IEP Case Management

Goals and Objectives/Benchmarks

* Enter more Goals by clicking *Add*. Once all Goals have been added, click *Save*.

Goals and Objectives / Benchmarks (+ Add)														
Edit	Delete	Goal Number	Goal Statement	Objectives										
		1	In order to prepare John for post-secondary living skills and employment in his chosen field, he wil	<table border="1"><thead><tr><th colspan="2">Short-Term Objectives / Benchmarks (X Modify)</th></tr><tr><th colspan="2">Objective</th></tr></thead><tbody><tr><td>Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m</td><td></td></tr><tr><td>Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m</td><td></td></tr><tr><td>Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m</td><td></td></tr></tbody></table>	Short-Term Objectives / Benchmarks (X Modify)		Objective		Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m		Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m		Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m	
Short-Term Objectives / Benchmarks (X Modify)														
Objective														
Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m														
Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m														
Given a curriculum-based assessment, John will answer questions related to drawing conclusions and m														

☒ Show Audit Trail

☒ Save - Please save this form.

☐ Save and Preview - Please save this form and open the preview of the form.

☐ Cancel - Please exit the wizard.

IEP CASE MANAGEMENT - MARK IEP OFFICIAL

IEP Case Management

Mark IEP Official

* To Make an IEP Official, click *Make Meeting Official* from the *IEP Timeline*

The screenshot displays the 'IEP Case Management' software interface. At the top, there is a navigation bar with tabs: 'IEP Overview', 'IEP Timeline' (which is highlighted), 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', 'Print History', 'Activity Log', and 'Attachments'. Below the tabs is a secondary bar with buttons: 'Add Form', 'Print IEP', 'Setup a Conference', 'Annual Review', and 'Reevaluation'. The main content area is titled 'IEP Conference' and contains a list of actions on the left and conference details on the right. The actions list includes 'Edit Meeting', 'Meeting Attendees', 'Print Meeting Forms', 'Print Meeting Attendees', 'Add Form to Meeting', and 'Make Meeting Official' (which is highlighted with a red box). The conference details on the right include: 'Conference: Conference to discuss John X One's IEP.', 'Purpose: Review your child's need for special education and related services and placement and develop an initial IEP.', 'Date: 10/31/2013 7:30:00 AM', 'Location: Meeting Room A', 'Attendee Count: 4', 'Form Count: 9', 'Cancelled: No', and 'Details: Review the child's need for special education and related services and placement and develop an initial IEP.'

IEP Case Management

Mark IEP Official

- * View column allows PDF review
- * Check the box next to the form(s) to make official or click *Select All*
- * A checkmark indicates that all error checking was passed
- * After desired forms have been selected, click *Change Status*

Change the Form Status Step 1 of 1

draft mode that are associated with the conference you selected are listed below. Any forms that have errors will be denoted with a red X. You may click on that X to start the wizard for that form and fix any errors. Forms that have no errors are denoted with a check mark. You may select those forms to be updated to Official status. After you select all the form(s) you wish to change to Official status on click the Change Status button.

View a pdf of the form(s)

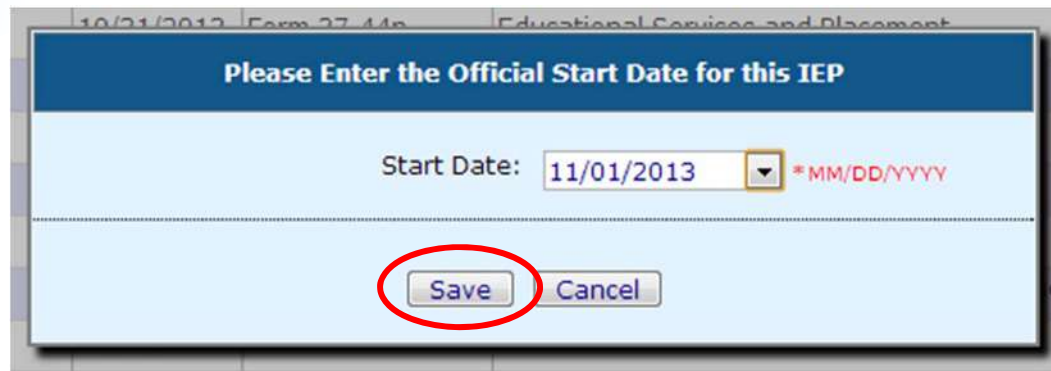
Forms with Draft Status (Select All) (Clear All)						
View	Make Official	Passed Edits?	Errors	Form Date	Name	Description
(0)	<input type="checkbox"/>	✓		10/31/2013	Form 37-44	Conference Summary
(0)	<input type="checkbox"/>	✓		10/31/2013	Form 37-44q	Educational Services and Placement (Page 2)
(0)	<input type="checkbox"/>	✓		10/31/2013	Form 37-44p	Educational Services and Placement
(0)	<input type="checkbox"/>	✓		10/31/2013	Form 37-44o	Assessment
(0)	<input type="checkbox"/>	✓		10/31/2013	Form 37-44n	Educational Accommodations and Support
(0)	<input type="checkbox"/>	✓		10/31/2013	Form 37-44h	Secondary Transition
(0)	<input type="checkbox"/>	✓		10/31/2013	Form 37-44m	Goals and Objectives
(0)	<input type="checkbox"/>	✓		10/31/2013	Form 37-44g	Present Levels of Academic Achievement and Functional Performance
(0)	<input type="checkbox"/>	✓		10/18/2013	Form 34-57d	Notification of Conference

[Print Errors](#) [Change Status](#)

IEP Case Management

Mark IEP Official

- * Enter the IEP Start Date and click *Save*



10/21/2013 Form 27-44e Educational Services and Placement

Please Enter the Official Start Date for this IEP

Start Date: 11/01/2013 ▼ *MM/DD/YYYY

Save Cancel

IEP CASE MANAGEMENT – PROGRESS REPORTS

IEP Case Management Progress Reports

IEP Conference	
Edit Meeting Meeting Attendees Print Meeting Forms Print Meeting Attendees Add Form to Meeting Make Meeting Official	Conference: Conference to discuss John X One's IEP. Purpose: Review your child's need for special education and related services and placement and develop an initial IEP. Date: 10/31/2013 7:30:00 AM Location: Meeting Room A Attendee Count: 4 Form Count: 10 Cancelled: No Details: Review the child's need for special education and related services and placement and develop an initial IEP.
Click Here to Hide All the Forms Associated with the Meeting	
Print Form Form Activity Log	Form: Form 37-44g: Present Levels of Academic Achievement and Functional Performance Date: 10/31/2013 Status: Official Update Info: Admin, Wovsed - 10/18/2013 4:00:06 PM
Print Form Form Activity Log Add progress report (Option 1) Add progress report (Option 2: Data Chart)	Form: Form 37-44m: Goals and Objectives Date: 10/31/2013 Status: Official Update Info: Admin, Wovsed - 10/18/2013 4:00:06 PM

* Once an IEP is marked official, Progress Reports become available

IEP Case Management Progress Reports

* Select the Report Date and the Reporting Staff Member then click *Continue*

Progress Report

Step 1 of 2

You are reporting progress on annual goals for this student. Enter the name of the person completing the report of progress and the report date.

Report Date:

10/21/2013

* MM/DD/YYYY

Reporting Staff Member:


Search

*


☒ Show Audit Trail

☒ Continue - Please continue the wizard.

☐ Cancel - Please exit the wizard.

 Cancel

Continue



IEP Case Management Progress Reports

Goal #1:
In order to prepare John for post-secondary living skills and employment in his chosen field, he will complete reading activities related to drawing conclusions and making inferences with 70% accuracy.

Goal Area(s): Academic
Illinois Learning Standard #: 01-Reading

Progress

☐ Completed
☐ Making Expected Progress
☐ Not Making Expected Progress
☐ Not Introduced Yet
☐ Demonstrated in a Data Chart

Additional Comments:

Clear

(3) Objective(s)/Benchmark(s)
☒ Report On Objective(s)

Objective/Benchmark:
Given a curriculum-based assessment, John will answer questions related to drawing conclusions and making inferences with 50% accuracy.

☐ Completed
☐ Making Expected Progress
☐ Not Making Expected Progress
☐ Not Introduced Yet
☐ Demonstrated in a Data Chart

Additional Comments:

Clear

Objective/Benchmark:
Given a curriculum-based assessment, John will answer questions related to drawing conclusions and making inferences with 60% accuracy.

☐ Completed
☐ Making Expected Progress
☐ Not Making Expected Progress
☐ Not Introduced Yet
☐ Demonstrated in a Data Chart

Additional Comments:

Clear

Objective/Benchmark:
Given a curriculum-based assessment, John will answer questions related to drawing conclusions and making inferences with 70% accuracy.

☐ Completed
☐ Making Expected Progress
☐ Not Making Expected Progress
☐ Not Introduced Yet
☐ Demonstrated in a Data Chart

Additional Comments:

Clear

IEP Case Management Progress Reports

- * The timeline now includes a Progress Report and the form can be made official

IEP Conference	
Edit Meeting Meeting Attendees Print Meeting Forms Print Meeting Attendees Add Form to Meeting Make Meeting Official	Conference: Conference to discuss John X One's IEP. Purpose: Review your child's need for special education and related services and placement and develop an initial IEP. Date: 10/31/2013 7:30:00 AM Location: Meeting Room A Attendee Count: 4 Form Count: 10 Cancelled: No Details: Review the child's need for special education and related services and placement and develop an initial IEP.
Click Here to Hide All the Forms Associated with the Meeting	
Print Form Form Activity Log	Form: Form 37-44g: Present Levels of Academic Achievement and Functional Performance Date: 10/31/2013 Status: Official Update Info: Admin, Wovsed - 10/18/2013 4:00:06 PM
Print Form Form Activity Log Add progress report (Option 1) Add progress report (Option 2: Data Chart)	Form: Form 37-44m: Goals and Objectives Date: 10/31/2013 Status: Official Update Info: Admin, Wovsed - 10/18/2013 4:00:06 PM
Edit Form Delete Form Make Form Official Print Form Form Activity Log	Form: Form 37-44t: Progress Annual Goals Option 1 Date: 10/21/2013 Status: Draft Update Info: Admin, Wovsed - 10/21/2013 9:18:58 AM

IEP CASE MANAGEMENT - PRINT DRAFT AND/OR OFFICIAL IEP

IEP Case Management

Print Draft IEP

- * To print a Draft IEP, click *Print Meeting Forms* for the Conference under *IEP Timeline*

IEP Overview | **IEP Timeline** | IEP Forms | Notice and Consent Forms | Eligibility Forms | Print History | Activity Log | Attachments

+ Add Form | Print IEP | Setup a Conference | Annual Review | Reevaluation

IEP Conference

Edit Meeting | Meeting Attendees | **Print Meeting Forms** | Print Meeting Attendees | Add Form to Meeting | Make Meeting Official

Conference: **Conference to discuss John X One's IEP.**
 Purpose: **Review your child's need for special education and related services and placement and develop an initial IEP.**
 Date: **10/31/2013 7:30:00 AM**
 Location: **Meeting Room A**
 Attendee Count: **4**
 Form Count: **9**
 Cancelled: **No**
 Details: Review the child's need for special education and related services and placement and develop an initial IEP.

- * All pages will have a Draft watermark until the IEP is marked Official

STUDENT NAME: John X One DATE OF MEETING: 10/31/2013

INDIVIDUALIZED EDUCATION PROGRAM (CONFERENCE SUMMARY REPORT)

DATE OF MOST RECENT EVALUATION: DATE OF NEXT REEVALUATION:

PURPOSE OF CONFERENCE (Check all that apply)					
<input type="checkbox"/> Review of Existing Data	<input type="checkbox"/> Initial Evaluation/Eligibility	<input type="checkbox"/> Reevaluation	<input checked="" type="checkbox"/> Initial IEP	<input type="checkbox"/> IEP Review and Revision	
<input type="checkbox"/> Secondary Transition	<input type="checkbox"/> FBA/BIP	<input type="checkbox"/> MDR	<input type="checkbox"/> Graduation	<input type="checkbox"/> Other	

STUDENT IDENTIFICATION INFORMATION		
ADDRESS (Street, City, State, Zip Code)	DATE OF BIRTH	SIS ID
120 Pankavilla Lane Durham, NC 27604	01/01/1999	999999901

IEP Case Management

Print Official IEP



- * Form Status

- * Click *Official* and check the box to include a Cover Page and/or the Procedural Safeguards

- * Form Type

- * Select the type of forms to print
 - * To configure a Cover Page or Letter Head, see the [I-Star User Guide](http://www.hbug.k12.il.us/IStar/Userguide/index.htm) <http://www.hbug.k12.il.us/IStar/Userguide/index.htm>
 - * Once all areas have been addressed, click *OK*

A screenshot of the 'IEP Print Options' dialog box. The dialog has a title bar 'IEP Print Options'. It contains three main sections: 'Form Status', 'Form Type', and 'Configuration'. The 'Form Status' section has radio buttons for 'Official' (selected) and 'Review'. Under 'Official', there are checkboxes for 'Include cover page' and 'Include Procedural Safeguards (print now)'. Under 'Review', there is a label 'Include forms with the following status:' followed by radio buttons for 'Both Official and Draft', 'Official Only', and 'Draft Only'. The 'Form Type' section has radio buttons for 'IEP Forms Only', 'Consent Forms Only', and 'Both IEP and Consent Forms' (selected). The 'Configuration' section has a 'Cover Page (configure)' button with a preview image, a 'Middle Center' label, and a 'Letter Head (configure)' button with a preview image. At the bottom right, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red box. A 'Help' button is at the bottom left.

IEP CASE MANAGEMENT - REVISIONS AND AMENDMENT PROCESS

IEP Case Management

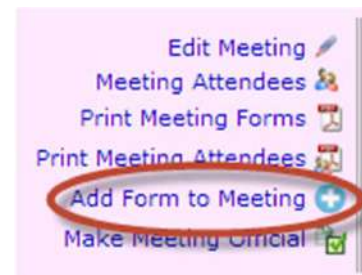
IEP Revisions



- * Once an IEP is marked Official, all future changes require another IEP meeting or an Amendment if both parties agree
- * The official Amendment Process should only be used for minimal changes
- * To setup a new meeting, use *Setup a Conference* 6 step wizard



- * Click *Add Form to Meeting* to revise the IEP



IEP Case Management

IEP Revisions



- * Select from the IEP Forms list to add new forms or select from existing IEP forms that need to be revised

Add a FormStep 1

Please select the form you wish to add.

IEP Forms

Notice and Consent Forms

Eligibility Forms

Select the Form

Started	IEP Forms	Name
	Data Chart	Form 37-44f
	Present Levels of Academic Achievement and Functional Performance	Form 37-44g
	Secondary Transition	Form 37-44h
	Functional Behavioral Assessment	Form 37-44j
	Behavioral Intervention Plan	Form 37-44k and Form 37-44l
	Goals and Objectives	Form 37-44m
	Educational Accommodations and Support	Form 37-44n
	Assessment	Form 37-44o
	Educational Services and Placement	Form 37-44p
	Educational Services and Placement (Page 2)	Form 37-44q
	Manifestation Determination	Form 37-44r
	Additional Notes/Information	Form 37-44s

You may also select official IEP forms that need to be revised.

Forms Available for Revision

Select	Select	Name	Description	Meeting Date
(0)	✓	Form 37-44	Conference Summary	11/07/2013

Return ➡

IEP Case Management

IEP Revisions



- * Once the revisions have been made, remember to make the new meeting official. The current IEP will now contain 2 conferences in the IEP timeline.

IEP Overview	IEP Timeline	IEP Forms	Notice and Consent Forms	Eligibility Forms	Print History	Activity Log	Attachments
Add Form	Print IEP	Setup a Conference	Annual Review	Reevaluation			
IEP Conference							
Edit Meeting Meeting Attendees Print Meeting Forms Print Meeting Attendees Add Form to Meeting Make Meeting Official		<p>Conference: Conference to discuss John X One's IEP. Purpose: Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation. Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation. Date: 11/8/2013 7:30:00 AM Location: Meeting Room A Attendee Count: 4 Form Count: 3 Cancelled: No Details: Review the child's educational status and determine what additional data, if any, are needed to complete the child's evaluation.</p>					
Click Here to View All the Forms Associated with the Meeting							
IEP Conference							
Edit Meeting Meeting Attendees Print Meeting Forms Print Meeting Attendees Add Form to Meeting Make Meeting Official		<p>Conference: Conference to discuss John X One's IEP. Purpose: Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation. Review your child's educational status and determine what additional data, if any, are needed to complete your child's evaluation. Date: 11/7/2013 7:30:00 AM Location: Meeting Room A Attendee Count: 4 Form Count: 2 Cancelled: No Details: Review the child's educational status and determine what additional data, if any, are needed to complete the child's evaluation.</p>					
Click Here to View All the Forms Associated with the Meeting							

IEP Case Management

Create an Amendment



- * If all parties agree to create an official amendment without meeting, click *Create an Amendment*

Navigation bar showing various options:

- IEP Overview
- IEP Timeline**
- IEP Forms
- Notice and Consent Forms
- Eligibility Forms
- Print History
- Activity Log
- Attachments

Sub-navigation bar:

- Add Form
- Print IEP
- Setup a Conference
- Create an Amendment**
- Annual Review
- Reevaluation

- * Select personnel from the *Access List* that spoke with the Parent/Guardian by clicking the checkmark in the Select column, then click *Continue*

IEP Amendment Step 1 of 5

Please add the personnel that had contact with the parent/guardian.

Personnel That Spoke to the Parent/Guardian (+ Add)						
Delete	Personnel					
No Records Found						

You may select personnel from the access list listing below. If a person not listed in the access list spoke to the parent/guardian you may click the Add link above to search for that personnel.

Access List						
Select	Name	Entity	Title	Interpreter	Read-Only	Notifications
<input checked="" type="checkbox"/>	Wovsed Admin	Wabash & Ohio Valley Sp Ed Dist		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Wovsed1 DistrictDoc1	Norris City Annex		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

☒ Show Audit Trail

☒ Continue - Please continue the wizard.
☐ Cancel - Please exit the wizard.

IEP Case Management

Create an Amendment

- * Enter the form date, date of contact and the method of communication then click *Continue*

IEP Amendment

Step 2 of 5

Select the method by which the discussion was made to the parent or guardian.

[Spell Check](#)

Form Date: 10/21/2013 *MM/DD/YYYY

Date of Contact: 10/21/2013 *MM/DD/YYYY

Relevant	Items
<input type="checkbox"/>	Met in person
<input type="checkbox"/>	Spoke on the phone
<input type="checkbox"/>	Exchanged e-mails/texts
<input type="checkbox"/>	Exchanged faxes

☒ Show Audit Trail

[Spell Check](#)

☒ Continue - Please continue the wizard.

☐ Cancel - Please exit the wizard.

[Previous](#) [Cancel](#) [Continue](#)

IEP Case Management

Create an Amendment

- * Enter the Effective Date for the changes and the explanation of the changes then click *Continue*

IEP Amendment

Step 3 of 5

Please enter the changes that are being made to the IEP.

[Spell Check](#)

Effective Date: *MM/DD/YYYY

Changes and Explanation of Changes:

☒ Show Audit Trail

[Spell Check](#)

☒ Continue - Please continue the wizard.

☐ Cancel - Please exit the wizard.

[Previous](#) [Cancel](#) [Continue](#)


IEP Case Management

Create an Amendment

* Verify and/or edit the contact information and click *Save*




IEP AmendmentStep 4 of 5

You are selecting the personnel that will appear on this form. The form instructs the recipient to direct all questions to the person selected as the Contact. The person selected in the Sincerely column is listed as the signator on the form. The same person can be the contact and signator. You may update the title(s) and phone number(s) for the personnel by clicking the respective Modify links. And you may also change your contact list by clicking the Modify link on the header.

Form Contact List ( Modify) (Clear)					
Contact	Sincerely	Personnel	Title(s)	Phone(s)	
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Johnny Smith	<div>Title (Modify) Principal</div>	Type	Number (Modify) Mobile (217) 622-5555

☒ Show Audit Trail

☒ Save and Continue - Please save and continue the wizard.
☐ Cancel - Please exit the wizard.

 Previous  Cancel **Save** 

IEP Case Management

Create an Amendment

- * Click on the check mark for the forms, if any, that you would like to amend and click *Return*

Forms Included in Amendment				
Actions	View Original	View New	Name	Current Errors
No Records Found				

Available Forms				
View	Select	Name	Description	Meeting Date
	✓	Form 37-44t	Progress Annual Goals Option 1	10/21/2013
	✓	Form 37-44g	Present Levels of Academic Achievement and Functional Performance	10/31/2013
	✓	Form 37-44m	Goals and Objectives	10/31/2013
	✓	Form 37-44h	Secondary Transition	10/31/2013
	✓	Form 37-44n	Educational Accommodations and Support	10/31/2013
	✓	Form 37-44o	Assessment	10/31/2013
	✓	Form 37-44p	Educational Services and Placement	10/31/2013
	✓	Form 37-44q	Educational Services and Placement (Page 2)	10/31/2013
	✓	Form 37-44	Conference Summary	10/31/2013

Show Audit Trail

Return

IEP Case Management

Create an Amendment

- * Click on *IEP Timeline* tab and locate the *IEP Amendment*
- * The Amendment process created the *Notification of IEP Amendment*, as well as the form that was selected to amend
- * Select the form to amend and make necessary changes

The screenshot displays the 'IEP Timeline' tab in a software application. The interface is divided into several sections:

- Top Navigation Bar:** Includes tabs for 'IEP Overview', 'IEP Timeline' (selected), 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', 'Print History', 'Activity Log', and 'Attachments'. Below these are buttons for 'Add Form', 'Print IEP', 'Setup a Conference', 'Annual Review', and 'Reevaluation'.
- IEP Conference Section (Pink background):**
 - Left Column (Actions):** Edit Meeting, Meeting Attendees, Print Meeting Forms, Print Meeting Attendees, Add Form to Meeting, Make Meeting Official.
 - Right Column (Details):**
 - Conference: **Conference to discuss John X One's IEP.**
 - Purpose: **Review your child's need for special education and related services and placement and develop an initial IEP.**
 - Date: **10/31/2013 7:30:00 AM**
 - Location: **Meeting Room A**
 - Attendee Count: **4**
 - Form Count: **10**
 - Cancelled: **No**
 - Details: **Review the child's need for special education and related services and placement and develop an initial IEP.**
- Link:** Click Here to View All the Forms Associated with the Meeting
- IEP Amendment Section (Light Blue background):**
 - Left Column (Actions):** Edit Amendment, Delete Amendment, Print Amendment Forms, Manage Amendment Forms, Make Amendment Official.
 - Right Column (Details):**
 - Date: **10/21/2013**
 - Status: **Draft**
 - Form Count: **2**
 - Changes and Explanation: **Add 20 minutes to reading activities daily.**
- Link:** Click Here to View All the Forms Associated with the Amendment
- Form List Section (White background):**
 - Form 1:**
 - Form: **Form 37-44m: Goals and Objectives**
 - Date: **10/31/2013**
 - Status: **Draft**
 - Update Info: **Admin, Wovsed - 10/21/2013 10:35:52 AM**
 - Form 2:**
 - Form: **Form 34-37g: Notification of IEP Amendment**
 - Date: **10/21/2013**
 - Status: **Draft**
 - Update Info: **Admin, Wovsed - 10/21/2013 10:33:05 AM**

IEP Case Management

Create an Amendment

* Click *Make Amendment Official* to remove the Draft watermark to print

IEP Amendment

Edit Amendment

Delete Amendment

Print Amendment Forms

Manage Amendment Forms

Make Amendment Official

Date: 10/21/2013

Status: Draft

Form Count: 2

Changes and Explanation: Add 20 minutes to reading activities daily.

Click Here to View All the Forms Associated with the Amendment

Edit Form

Delete Form

Print Form

Form Activity Log

Form: Form 37-44m: Goals and Objectives

Date: 10/31/2013

Status: Draft

Update Info: Admin, Wovsed - 10/21/2013 10:35:52 AM

Edit Form

Delete Form

Print Form

Form Activity Log

Form: Form 34-57g: Notification of IEP Amendment

Date: 10/21/2013

Status: Draft

Update Info: Admin, Wovsed - 10/21/2013 10:33:05 AM

IEP Case Management

Create an Amendment

- * The changes will be amended into the IEP to print all forms or click *Print Amendment Forms* to print the amendment only

The screenshot displays the 'IEP Timeline' tab in a software interface. At the top, there is a navigation bar with tabs: 'IEP Overview', 'IEP Timeline' (selected), 'IEP Forms', 'Notice and Consent Forms', 'Eligibility Forms', 'Print History', 'Activity Log', and 'Attachments'. Below this is a secondary bar with buttons: 'Add Form', 'Print IEP', 'Setup a Conference', 'Annual Review', and 'Reevaluation'.

The main content area is divided into two sections:

- IEP Conference** (pink background):
 - Left sidebar: Edit Meeting, Meeting Attendees, Print Meeting Forms, Print Meeting Attendees, Add Form to Meeting, Make Meeting Official.
 - Right panel:
 - Conference: **Conference to discuss John X One's IEP.**
 - Purpose: **Review your child's need for special education and related services and placement and develop an initial IEP.**
 - Date: **10/31/2013 7:30:00 AM**
 - Location: **Meeting Room A**
 - Attendee Count: **4**
 - Form Count: **10**
 - Cancelled: **No**
 - Details: Review the child's need for special education and related services and placement and develop an initial IEP.
 - Bottom link: Click Here to View All the Forms Associated with the Meeting
- IEP Amendment** (light blue background):
 - Left sidebar: **Print Amendment Forms** (highlighted with a red box).
 - Right panel:
 - Date: **10/21/2013**
 - Status: **Official**
 - Form Count: **2**
 - Changes and Explanation: **Add 20 minutes to reading activities daily.**
 - Bottom link: Click Here to View All the Forms Associated with the Amendment

IEP Case Management

Annual Review/Reevaluation

- * Once a student has an IEP in I-Star, use *Annual Review* and/or *Reevaluation* for all future IEPs

- * Evaluate the Access List and click *Save*

Access List (+ Add)

Edit	Delete	Name	Entity	Interpreter	Read-Only	Notifications	Make Forms Official
		Admin, Wovsed	Wabash & Ohio Valley Sp Ed Dist	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		DistrictDoc1, wovsed1	Norris City Annex	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You can select a user from the list of common user for your district.

Select	Name	Interpreter	Read-Only	Notifications	Make Forms Official
No Records Found					

☒ Save - Please save the IEP Package
☐ Cancel - Please exit the wizard.

Cancel

- * Select *Setup a Conference* to create a new IEP
- * The current IEP will be archived once a start date is entered for the new IEP

IEP Case Management

Archived IEPs

* To view Archived IEPs for a student click *Archived IEPs*



Archived IEP Packets							
View	Print History	Resident District	Status	Year	IEP Start	IEP End	Not Eligible
		Harrisburg CUSD 3	Official	2013	11/1/2013	10/21/2013	<input type="checkbox"/>



* Click the PDF icon to view/print the Archived IEPs

IEP Case Management Activity Log

- * The activity log contains a very detailed audit trail in the system and is available to all users with access



- * The log book tab shows all user activity:

Student Log Book				
View 20				Log Book Entries
User Name	Log Date	Type	Reason	Activity Count
Wovsed Admin (Coop Admin)	10/21/2013	Screen Navigation		37
Wovsed Admin (Coop Admin)	10/21/2013	Screen Navigation	Draft/Create the IEP	59
Wovsed Admin (Coop Admin)	10/21/2013	Data Transaction	Draft/Create the IEP	2
Wovsed Admin (Coop Admin)	10/21/2013	Printed IEP	Draft/Create the IEP	11
Wovsed Admin (Coop Admin)	10/21/2013	Data Transaction		12
Wovsed Admin (Coop Admin)	10/18/2013	Screen Navigation	Draft/Create the IEP	104
Wovsed Admin (Coop Admin)	10/18/2013	Data Transaction		58
Wovsed Admin (Coop Admin)	10/18/2013	Data Transaction	Draft/Create the IEP	8
Wovsed Admin (Coop Admin)	10/18/2013	Screen Navigation		14
Wovsed Admin (Coop Admin)	10/18/2013	Printed IEP	Draft/Create the IEP	2
harriburg Admin (District Admin)	10/18/2013	Screen Navigation		2
Harrisburg District Admin (Coop Admin)	10/18/2013	Screen Navigation		6
Wovsed Admin (Coop Admin)	10/17/2013	Screen Navigation		5
Wovsed Admin (Coop Admin)	10/17/2013	Screen Navigation	Draft/Create the IEP	5
Wovsed Admin (Coop Admin)	10/17/2013	Data Transaction	Draft/Create the IEP	2
Wovsed Admin (Coop Admin)	10/16/2013	Screen Navigation		40
Wovsed Admin (Coop Admin)	10/16/2013	Screen Navigation	Draft/Create the IEP	66
Wovsed Admin (Coop Admin)	10/16/2013	Data Transaction		26
Wovsed Admin (Coop Admin)	10/16/2013	Data Transaction	Draft/Create the IEP	2
Wovsed Admin (Coop Admin)	10/15/2013	Screen Navigation	Draft/Create the IEP	23

IEP Case Management Activity Log

- * The details tab allows for filtering by date range and user account
- * Also under details, Data Transactions, Printed IEPs and Screen Navigation can be filtered by date range by user

Log Book Details

Filter Activity Log

Begin Date: 10/7/2013 MM/DD/YYYY End Date: 10/21/2013 MM/DD/YYYY User: Admin, Wovsed

Search

Student Activity Logs

Filters

Begin Date: 10/7/2013
End Date: 10/21/2013
User: Admin, Wovsed

You must select an Activity Item to view.

Activity Items

- + Data Transactions
- + Printed IEPs
- + Screen Navigations

Additional Resources

www.hbug.k12.il.us/IStar

I-Star
IEP Special Education Tracking and Reporting

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IEP
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Welcome!

The Illinois State Board of Education has developed a web-based IEP database system. This database system is a special education data management tool for districts in Illinois. The web-based IEP is integrated with the new personnel and pupil reporting systems, which are currently being developed. The student demographic data is pulled directly from the Student Information System (SIS). Instant error checking in I-Star will help your district achieve federal and State Performance Plan Indicators compliance. The web-based IEP will be available to school districts, free of charge.

Events

- November 1st Summer Orphanage Claim
- November 12th Fund Code 8 Private Facility Error Correction
- November 12th Personnel Claim Error Correction


Have questions? Contact Special Education at (217) 782-5589 between 8:00am - 5:00pm CST, Monday - Friday or click here to Contact Us
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Additional I-Star Resources

www.hbug.k12.il.us/IStar

View or print the I-Star User Guide

Support

 [View the User Guide](#)

 [Print the User Guide](#)

- Training & Support
- How-To printed guide
- Video trainings
- Live phone and email support
- Online / Onsite trainings
- Technical support
- IEP specific support

I-Star User Guide
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I-Star User Guide

The Illinois State Board of Education has developed a web-based IEP data integrated with the new personnel and pupil reporting systems, which are checking in I-Star will help your district achieve federal and State Performance

Last Updated: 07/30/13 | © Illinois State Board of Education & Harrisburg Project, 2013

I-Star User Guide

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I-Star User Guide

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I-Star

QUESTIONS??

ISBE Department of Special Education

(217) 782-5589

istar@isbe.net

IWAS Call Center

(217) 558-3600

Harrisburg Project

(800) 635-5274

support@hbug.k12.il.us