

Admin Session 5:



FORMS/BATCHES

EDITING VALUES



Forms & Batches

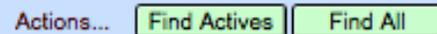


- District admins are in charge of activating the forms for their district, and of creating and updating batches.
- There are a variety of forms available for IEPs, evaluations, and other actions, some in multiple formats. All of the state model forms are available in E-Com.
- There is no restriction on the number of batches you may have – just remember, if you activate new forms or deactivate old ones, you must update the batches individually.

Forms



- Go to the Form screen by clicking the pink Form button.
- You can find active forms or all forms by selecting one of the two green 'Actions...' buttons.



- You may also search for specific forms using the Find button.
 - Search options include long name, short name, and text in the 'Purpose/Notes' field in addition to form number and form owner.

Forms



- Active forms are noted with an 'x' in the Active checkbox.

Form ID	Active	Form Name	Short Name	Form Pu
▶ 01	<input type="checkbox"/>	Consent for Mutual Exchange of Information	Mutual Exch	old form
▶ 01.1	<input type="checkbox"/>	Consent for Mutual Exchange of Information	Mutual Exch	60 days
▶ 01.2	<input checked="" type="checkbox"/>	Consent for Mutual Exchange of Information	Mutual Exch	no "expir
▶ 02.1	<input type="checkbox"/>	Evaluation Team Plan Worksheet	Eval Plan	
▶ 02.2	<input checked="" type="checkbox"/>	Assessment Plan -SMF	Assessment Plan	

- State model forms are noted with 'SMF' in their long form name.
- If you click on the triangle in front of a form with 'SMF' in the name, you get the form detail screen.
- Here you can see which state model form it is, along with other information.

Form Detail Screen



- The form detail screen all sorts of valuable information; there is also room there for you to make notes.
- If the form is a state model form, the state model form number will be entered here.
- Note: state model form numbers are frequently very different from E-Com form numbers.

Active Form	<input checked="" type="checkbox"/>	Form Owner	Master
Form ID	02.2		
Form Name	Assessment Plan SMF		
Short Form Name	Assessment Plan		
Form Number	2.2	State Model Form	2a
Date Added	5/28/2010		

Form Detail Screen, cont.



- If you use district forms, you may need to check the following boxes:

- IEP Date Warning: Shows a warning if the form's IEP date doesn't match the student's current IEP date. IEP cover forms use this setting.
- Leave unlocked when batch is locked: This box is for forms that may still need to be edited after the batch is locked. Progress reports (13.x) are currently the only forms with this box checked.
- Team Eval with Areas of Service: If you are using form 4.5 or 4.51, this box should be checked. If it is not, areas of service listed on the form will not populate to the student record.

Form Options	
IEP Date Warning <input type="checkbox"/>	Current G&O Form <input type="checkbox"/>
Indiv Eval <input type="checkbox"/>	Number of Goals <input type="checkbox"/>
Progress Report <input type="checkbox"/>	Has Objectives <input type="checkbox"/>
Print Records being Browsed <input type="checkbox"/>	Current Summary Matrix Form <input type="checkbox"/>
Auto Insert Adverse Edu. Impact <input type="checkbox"/>	Leave unlocked when batch is locked <input type="checkbox"/>
Team Eval with Adverse Edu. Impact <input type="checkbox"/>	Team Eval with Areas of Service <input type="checkbox"/>
Prepopulate Matrix <input type="checkbox"/>	

Form Detail Screen Tabs



- The form detail screen has two tabs, the Details tab and the Default/Required Fields tab.
- The Details tab has fields for form purpose and form help.
 - Text in the form purpose field is visible on the form list. If you allow staff in your district to view the form list, they can see this text.
 - Text in the form help field is visible to all staff when they select “E-Com Form Help” from the Help menu while on that form.
- Any value lists that the form contains are also shown on the Details tab. These must be edited from the form, however.

Form Detail Screen Tabs



- The Default/Required Fields tab is new in the latest version of E-Com. It shows all the fields that contain default text or that are marked as required for staff to complete.
- You may edit the default text for the field, or edit the message that is given when staff do not fill in a required field, from this tab.
- You may also delete default text or field requirements here. They must be set on the specific form, however; they cannot be set from this location.

Form Detail Screen, cont.



- The form detail screen also tells you whether this form has a version in a different language. At this time, only Spanish is available, and only for certain forms.
- If your district uses E-Com for tracking 504 students, you can decide whether a form will be available to the 504 or the SpEd program, or both.
- You may also make notes about the use of the form in the Notes section. These will not be visible on the forms list; only admin staff can see them.

Batches



- You edit batches from the Admin menu, by selecting Batch Editing.
- If you deactivate a form on the forms list, you must manually remove that form from any batch that contains it, and replace it with the form you activated instead.
- You can do a search for batches containing the form you deactivated, so make a note of the form number for both the deactivated form and the replacement form.

Batch Editing



- To find batches where you need to replace deactivated forms, go to Batch Editing.

- Once there, open any batch. Click the Find button, and enter the deactivated form number into the “form ID” field.

The screenshot shows a search interface with the following elements:

- A search bar at the top with the label "name" and a magnifying glass icon.
- A section labeled "Description" with a search bar and a magnifying glass icon.
- A table with two columns: "Form ID" and "Form Name". Both columns have search bars and magnifying glass icons.
- A red arrow points to the "Form ID" search bar.

- When the search is complete, check the number of batches found, in the top right corner. You can move through the batches found using the back and forward arrows here.



- Remove the deactivated form from the list, and replace it with the new version of the form.

Batch Editing, cont.



- If you create a new batch, be sure to select a type for the batch. The choices are IEP, Eval, and Other.
- In addition, be sure to select a program; even if your district only uses E-Com for Special Education, be sure the Special Education box is checked.
- Add forms to the batch, and order them as you want them.
- Activate the batch once you are through, so that it will appear on the batch list for staff.

Sample Batches



Name Initial Evaluation **Type** Eval **Active** **Batch ID** 73

Description **Program(s)** Special Education

Form ID	Form Name	Sort Order	Create one for each area	Add Form
01.2	Consent for Mutual Exchange of	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
19.1	Request for Medical Information for	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
06.2	Prior Written Notice	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>
75	Parent Consent	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>
02.2	Assessment Plan SMF	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>
73	Review of Referral for Special Ed	6	<input type="checkbox"/>	<input checked="" type="checkbox"/>
74.1	Invitation to Attend a Meeting	7	<input type="checkbox"/>	<input checked="" type="checkbox"/>
04.5	Evaluation Report	8	<input type="checkbox"/>	<input checked="" type="checkbox"/>
04.2	Eval Supplement - SD SMF	9	<input type="checkbox"/>	<input checked="" type="checkbox"/>
28.1	Individual Evaluation	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>
28.1	Individual Evaluation	11	<input type="checkbox"/>	<input checked="" type="checkbox"/>
06.2	Prior Written Notice	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Name Re-Evaluation **Type** Eval **Active** **Batch ID** 199

Description **Program(s)** Special Education

Form ID	Form Name	Sort Order	Create one for each area	Add Form
74.1	Invitation to Attend a Meeting	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
02.2	Assessment Plan SMF	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
06.2	Prior Written Notice	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>
75	Parent Consent	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>
75.5	Parent Consent to Email Communication	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>
73	Review of Referral for Special Ed	6	<input type="checkbox"/>	<input checked="" type="checkbox"/>
19.1	Request for Medical Information for	7	<input type="checkbox"/>	<input checked="" type="checkbox"/>
28.1	Individual Evaluation	8	<input type="checkbox"/>	<input checked="" type="checkbox"/>
01.2	Consent for Mutual Exchange of	9	<input type="checkbox"/>	<input checked="" type="checkbox"/>
04.5	Evaluation Report	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>
04.2	Eval Supplement - SD SMF	11	<input type="checkbox"/>	<input checked="" type="checkbox"/>
06.2	Prior Written Notice	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>
06.2	Prior Written Notice	13	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Sample Batches, cont.



Name IEP w/Goal **Type** IEP **Active** **Batch ID** 4

Description Elem, Middle **Program(s)** Special Education

Form ID	Form Name	Sort Order	Create one for each area	Add Form
11.4	Individualized Education Program Cover	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
74.1	Invitation to Attend a Meeting	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14.1	Summary of Services Matrix v.2	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12.4	Measurable Annual Goal	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
82.12	Accom & Mod w/ Areas of Service	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>
34.3	Assessment of Student Achievement	6	<input type="checkbox"/>	<input checked="" type="checkbox"/>
34.6	Measures of Academic Progress (MAP)	7	<input type="checkbox"/>	<input checked="" type="checkbox"/>
61.1	Request to Excuse Team Member	8	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13.3	Progress Report	9	<input type="checkbox"/>	<input checked="" type="checkbox"/>
79	Consent to bill for school-based medicaid	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Name IEP w/Objectives **Type** IEP **Active** **Batch ID** 69

Description Elem, Middle **Program(s)** Special Education

Form ID	Form Name	Sort Order	Create one for each area	Add Form
74.1	Invitation to Attend a Meeting	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11.4	Individualized Education Program Cover	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14.1	Summary of Services Matrix v.2	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12.7	Measurable Annual Goal & Obj	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
82.12	Accom & Mod w/ Areas of Service	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>
34.3	Assessment of Student Achievement	6	<input type="checkbox"/>	<input checked="" type="checkbox"/>
34.6	Measures of Academic Progress (MAP)	7	<input type="checkbox"/>	<input checked="" type="checkbox"/>
61.1	Request to Excuse Team Member	8	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13.2	Progress Report with Short Term	9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
79	Consent to bill for school-based medicaid	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Sample Batches, cont.



Name IEP w/Transition/Goals **Type** IEP **Active** **Batch ID** 6

Description Transition IEP with Goal pages **Program(s)** Special Education

Form ID	Form Name	Sort Order	Create one for each area	Add Form
74	Invitation to Attend Meeting for Transition	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
36.1	IEP for Transition	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11.4	Individualized Education Program Cover	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14.1	Summary of Services Matrix v.2	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>
82.12	Accom & Mod w/ Areas of Service	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12.4	Measurable Annual Goal	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
34.3	Assessment of Student Achievement	7	<input type="checkbox"/>	<input checked="" type="checkbox"/>
34.6	Measures of Academic Progress (MAP)	8	<input type="checkbox"/>	<input checked="" type="checkbox"/>
61.1	Request to Excuse Team Member	9	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13.3	Progress Report	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>
79	Consent to bill for school-based medicaid	11	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Name IEP w/Transition/Obj **Type** IEP **Active** **Batch ID** 68

Description Transition IEP **Program(s)** Special Education

Form ID	Form Name	Sort Order	Create one for each area	Add Form
74	Invitation to Attend Meeting for Transition	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11.4	Individualized Education Program Cover	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
36.1	IEP for Transition	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14.1	Summary of Services Matrix v.2	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>
82.12	Accom & Mod w/ Areas of Service	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12.7	Measurable Annual Goal & Obj	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
34.3	Assessment of Student Achievement	7	<input type="checkbox"/>	<input checked="" type="checkbox"/>
34.6	Measures of Academic Progress (MAP)	8	<input type="checkbox"/>	<input checked="" type="checkbox"/>
61.1	Request to Excuse Team Member	9	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13.2	Progress Report with Short Term	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
79	Consent to bill for school-based medicaid	11	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Edit Value Lists



- Another thing that districts frequently want to do is to customize value lists on forms.
- Most value lists appear as drop-down lists, but some also appear as checkboxes.
- To edit these, go to the form list by clicking on the Form button.
- Find the form you want to modify the value lists on, and click on the blue underlined name in the list.
- Once on the form, go up to the “Form Options” menu and select “Edit Lists.”

Edit Value Lists, cont.



- “Edit Lists” will take you to a detail screen that shows all the lists for that particular form.
- Click on the black triangle in front of the list you want to edit, and it will open.
- Add new items, edit the items that are there, or delete items using the red ‘x’. It’s as simple as that!
- If a form is available in both English and Spanish, there will be two sets of list items. Please enter both the English and the Spanish for these forms; there is no translation function in E-Com.

Edit Value Lists, cont.



- You may set the order in which the items appear by numbering them in the “Sort Order” field.
- When you are through editing the list items, choose the “Go to Form” button, and check to make sure that your changes took place, and appear as you want them to.