E-Com User Training

General Session 3: Special Forms

Special Forms

- There are a number of forms in E-Com that contain calculations or that interact with other forms or with a student record.
- These forms include:
  - Individual evaluation forms: 28/28.1 allow for the easy addition of tests, EALRs/GLEs (soon to be common core), and the addition of notes that do not print, but are available for those tasked with filling out the student's goal forms. Some information on these forms may also be made available on evaluation report forms 4.5/4.51.
  - Evaluation report forms: 4.5/4.51 automatically update areas of service on the student record, and can pull information from individual evaluation reports.

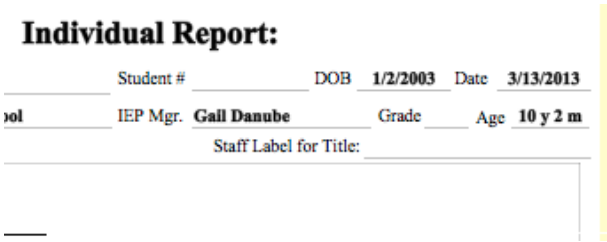
Special Forms, cont.

- Special forms also include:
  - Goals & objective forms: 12.4/12.7, which interact with progress report forms 13.1, 13.2 and 13.3.
  - IEP cover forms: 11.3/11.4 automatically display areas of service if a completed goal form for that area is present in the IEP batch.
  - The summary matrix form: 14.1 performs a percentage calculation on the form, and interacts with the student's Special tab to display the LRE code. It also allows for the calculation of staff minutes for the roster report.

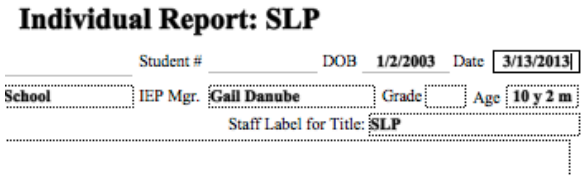
Individual Evaluation: 28 & 28.1

- The individual evaluation form is set up so that you can title it, usually with the staff role of the individual filling it out. To do this, select the drop-down by the header "Staff label for title."
- This changes the title of the form, and adds the label to the descriptor field of the form as well.

Before



After



Individual Eval., cont.

- Insertion buttons: There are several insertions functions available on form 28/28.1.
  - The first is "EALR/GLE" – and yes, this should shortly be common core standards.
  - When you select the EALR/GLE button, you will get a green dialog box.
  - Select the subject area and the student's grade.
  - The EALRs should appear. When you select one of these, the components appear in the second section. The Copy EALR will select just the selected EALR.
  - When you select a component, the expectations should appear in the third section. The Copy Component button will copy just the selected component.
  - If you select an expectation, you are able to just copy this GLE by clicking on the Copy GLE button.
  - You also have the option to copy the EALR, component, and selected GLE, or all the GLEs for the selected component.
  - Once you select any of the Copy buttons, you will be taken back to the form, where you may paste the text you selected.

Individual Eval., cont.

- There is also the option to insert tests into the Individual Evaluation Report form.
- E-Com comes with a variety of tests already entered into the text library, and your E-Com admin can add more.
- To add a test, select a category from the drop-down list available in the "Test to Insert" field. Once selected, a list of tests associated with that category should appear in the "Test Name" field. Select the one you want from this, and then click the "Insert Test" button.
- The test should appear in the large Test Results & Analysis field to the left.

Individual Eval., cont.

- A reporter may also provide some guidance to staff who will be filling out the IEP forms, by using the "Guidance for IEP" field to the right of the yellow nav area.
- Notes entered here will be visible to individuals working on a 12.4 or 12.7 form (Goals or Goals/Objectives forms).
- You can type or copy and paste notes into this field. On the goal form, they will display your name and the date you added them.

Evaluation Report: 4.5 & 4.51

- If your district uses form 4.1 (state model form), the functionality of these forms will not be available.
- Form 4.51 differs from 4.5 in that the areas of evaluation on page 1 are a district-editable value list and the consideration of other factors question on page 3 is reworded as a Yes/No.
- There are a couple of green buttons that allow you to quickly add summaries or adverse impacts from all individual evaluation forms in the batch.
  - Summaries will be labeled with the area of service; the adverse impacts will simply be added as separate entries in the field.

Evaluation Reports, cont.

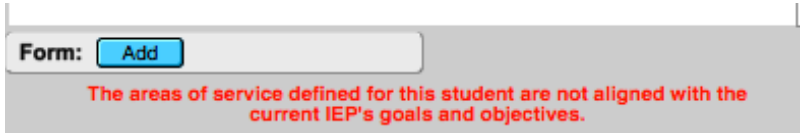
- Areas of service on the student record may be assigned via the 4.5 or 4.51 form.
- When you add a new 4.5/4.51 form, any areas of service already on the student record should blank. They will return if you delete the new Eval Report form.
- To assign areas, go to page 4, and click the yellow "Add Area" button above the "Recommended Specially Designed Instruction" field.
- Select the area of service you want to add from the drop-down list. (Your E-Com admin may add additional areas, if needed.)
- Areas of service selected on the 4.5 or 4.51 form will populate on the student screen (Placement tab and Information section) if the form is the most recent 4.5/4.51 form added to the student record.

Goals/Objectives: 12.4 & 12.7

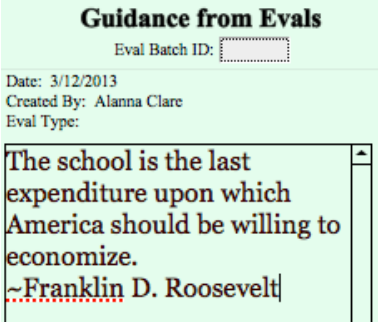
- If your district uses the state model forms (12.5/Goals and 12.6/Goals & Objectives), many of the functionalities discussed below are not available.
- 12.4/Goals & 12.7/Goals & Objectives have a field for present or current levels of performance; the state model forms do not.
- In addition, for these forms, the progress reporting takes place on a different form, 13.2 or 13.3. All other forms in the IEP batch may be locked, leaving only the progress report form unlocked for ongoing reporting.
- If your district uses these forms, each IEP batch should have (1) one goal or goal/objective form for each area of service, and (2) at least one progress report form. Depending on the version of the progress report form, there may be one of these for each area of service, as well.

Goals/Objectives, cont.

- Each form should have an Area of Service selected. If you select an area that is not assigned to this student via the Evaluation, you will get a "Compliance Alert" message.
- A Compliance Alert message will also appear in red below the batch view window on the Student screen.



- If staff have added notes in the "IEP Guidance" field on the 28 or 28.1 form, those notes will appear off to the side on the 12.4 or 12.7 form, along with the creation date and staff name.



Goals/Objectives, cont.

- Set Goal: E-Com can store goals in the text library, and staff can use these goals for convenience in completing the form.
- Clicking the pink "Set Goal" button brings up a dialog box where choices are available.
  - You may select subject areas and specific goals.
  - Common measurements are available as well.
  - Admin staff at the district level may edit these text selections and add new ones.
- This process is under construction at the current time. We hope to have the new Common Core standards soon, along with a more streamlined method of selecting and inserting the goals.
- Forms 12 and 12.3 are older, and use is deprecated.

Progress Reports: 13.2 & 13.3

- If your district uses forms 12.4 and/or 12.7, you should also be using the progress report forms. These forms will automatically display the goals from the 12.4 or 12.7 form, if IEP dates and the student number on the forms match.
- 13.2 requires that you select the area of service that you wish the form to reflect. If there are 12.4 or 12.7 forms in the same batch that already have areas of service assigned, those areas will appear in the drop-down list.
  - Objectives from the Goal form will appear as well. These are not editable on the 13.2 form; if necessary, they must be changed on the matching goal form.
- 13.3 shows goals from all Goal forms with the same IEP date. There is a progress key to show the progress on each goal on a quarterly basis. There is space for progress notes below.
- Forms 13 and 13.1 are older and use is deprecated.

IEP Cover: 11.3 & 11.4

- The latest versions of the IEP cover, 11.3 and 11.4, allow for the auto-population of areas of service.
- The student's areas of service will auto-populate in the "Completed Areas of Service" field.
- If the goal forms for those areas have the same IEP date as the cover sheet, and are marked as completed, the checkbox for that area will check.
- 11.3 has a section for present levels of achievement, whereas 11.4 simply states that present levels may be found on associated progress report forms.

Summary Matrix Form: 14.1

- Yes, this is the special form we get the most support requests on! It's a very complicated form, but hopefully also extremely useful.
- It was created for two reasons:
  - To gather data in a specific enough way to allow for the calculation of minutes of service, percentage of time in Special Education, and the student's LRE code.
  - To gather information about specific staff members who are serving students, in order to generate roster reports showing staff minutes served.

Summary Matrix, cont.

- You have two different options for adding areas of service. If you select the green "Add" button, you may add each area separately.
- If the student already has assigned areas of service, and has IEP dates, it may be easiest to use the "Add Services" button. This will populate the areas of service and the start and end dates.
- For each service, fill in the timeframe (per week, month, etc.) and the duration of services, select a location where these services are provided, and assign a staff member.
  - You may just assign a role instead, if you prefer, but remember, that affects the service roster report.

Summary Matrix, cont.

- The minutes will calculate on each line, and the total minutes will add up at the bottom of the page, in the "Total minutes per week" line.
  - Please note, if you don't feel the minutes are right, it could be because the location is not designated as a SpEd location. Your E-Com admin has control over which locations are so marked.
- Percentage of time is calculated based on the total number of building instructional minutes in the first field. This field is auto-populated from the serving school screen. It may also be changed on the form.
- The newest version of the form has an "as of" date field that you can use to determine the number of minutes on a specific date.

Summary Matrix, cont.

- Caveats/Cautions:
  - Minutes are calculated based on the dates. Be sure the "as of" date selected falls *after* the "Initiation of Services" date and *before* the "End of Services" date listed in the first section. If you select April 1, 2013, and services do not start until April 15, you will get "100% of time in general education" as a result.
  - Total minutes are calculated based on location. If the location is not a Special Education setting, the minutes will not be included in the total. Each district selects their own locations; ask your E-Com admin if you think that a location that should be SpEd is not being included in the calculation.
  - Serving school minutes are assigned by E-Com admin staff. If you believe that the serving school minutes are incorrect for a particular building, it would be better to have that corrected in the school settings than having to change it on every form. (K & PK are special cases, and will probably need to be managed manually.)

Summary Matrix, cont.

- The second function of the summary matrix is to calculate the student's LRE code.
- If you select the LRE setting, at the bottom of page 2 of the 14.1 form, the LRE code on the student's Special tab will automatically calculate, using the setting and the services listed on the ***most recent*** summary matrix form, as of the current date.
  - The calculated LRE code may be overridden by your E-Com admin, using the Exception Code field on the Special tab.

Summary Matrix, cont.

- The last main function of the summary matrix form is to allow the calculation of minutes per staff, for a service roster report.
- The service roster report looks for the matrix forms of active students, with services that are occurring on the current date, and calculates the minutes by staff member.
- You can find your own roster report on the Staff screen, by going up to the menu item "Reports."There you can select "My Service Roster" and see your own individual service minutes report.
- The service roster for the entire district may be found on the Reports screen, by clicking the peach "Service Roster" button.