ECATS

Special Education Module: End User Manual
2019

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WHO IS PUBLIC CONSULTING GROUP (PCG)?

Public Consulting Group, Inc. (PCG) is a management consulting firm that primarily serves public sector education, health, human services, and other state, county, and municipal government clients. Established in 1986 with headquarters in Boston, Massachusetts, PCG operates from 46 offices across the U.S. and in Montreal, Canada, London, United Kingdom, and Lodz, Poland. The firm has extensive experience in all 50 states, clients in six Canadian provinces, and a growing practice in the European Union.

PCG'S EDUCATION SERVICES PRACTICE AREA (ESPA)

PCG Education offers consulting solutions that help schools, school districts, and state education agencies/ministries of education to promote student success, improve programs and processes, and optimize financial resources. Together with its state-of-the-art technology, PCG Education's consulting approach helps educators to make effective decisions by transforming data into meaningful results. Below we highlight several of our ESPA services.
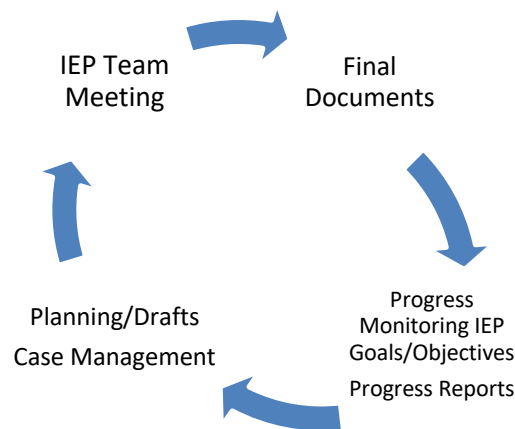
Our service and product offerings include:
- **Special Education Consulting Services**: PCG offers comprehensive services and customized technology solutions to special education departments. Related applications and services such as EasyFax™, PaperClip™, Advanced Reporting™, state vertical reporting, Pearson partner, PowerSchool data integration, and School Interoperability Framework (SIF) certification make PCG Education an undisputed market leader.
    - **ECATS** is an internet-based solution for the development of Individualized Education Program (IEPs) and for the management of special education reporting in North Carolina. ECATS provides administrators with a powerful organizational tool, extensive reporting capabilities and instant access to student information securely via the internet.
    - The Service documentation module is a component of ECATS. Having a single universal system for both IEP and service documentation purposes minimizes the burden on providers by allowing for a highly streamlined process for IEP development and subsequent service documentation. This consolidation allows for additional monitoring of service documentation, ensuring that students are receiving the proper level of services, as well as maximizing Medicaid reimbursement for the school district.
    - The MTSS module is a third component of ECATS. ECATS MTSS complements the multi-tiered framework which promotes school improvement through engaging, research-based academic and behavioral practices. ECATS MTSS uses an early warning system to assist educators in their data-based problem solving for decision making. The intervention planning page is designed to efficiently document interventions at both the supplemental and intensive levels. ECATS MTSS allows for progress monitoring and intervention effectiveness. Reports and summary dashboards also provide aggregate information for LEA, School and student level problem-solving.

ECATS SYSTEM OVERVIEW: Special Education Module

ECATS is an electronic data management system that allows users to create a virtual filing cabinet of all the documentation associated with special education.

In ECATS, data is entered specific to the process(es) in which an IEP Team engages. From initial referral to reevaluation to planning for an IEP Team meeting, users can manage the services provided to students with disabilities through ECATS.

Users may create draft documents to assist planning then finalize based upon the decisions of the IEP Team. Finalized documents provide a historical record and the basis for future activities that may build upon data already entered into the system. ECATS also provides the electronic platform for sharing files when students transition between local education agencies within North Carolina – ensuring that little to no interruption in the delivery of special education and related services is experienced by the student.

IEP Team Meeting → Final Documents → Progress Monitoring IEP Goals/Objectives Progress Reports → Planning/Drafts Case Management → IEP Team Meeting

ECATS GENERAL INFORMATION

Security

All ECATS information is confidential. The server uses Secure Socket Layer (SSL) technology to encrypt all information as it flows across the Internet. This is the same technology that online merchants and banks use to protect your credit card number and other sensitive information.

Please adhere to the following procedures to ensure security:
- **Do not give your account name or password to anyone.**
- **Do not write your password down where it can be seen by others.**
- **Do not save documents or reports to an unsecured computer.**
- **Always log off of ECATS and close your browser when you are finished.**

Note: ECATS will automatically log you out of the system after 120 minutes of inactivity.

Navigation

ECATS is menu bar driven with tabs along the top on the screen that are used to navigate through the system. Clicking different tabs takes the user to different parts of the database. End users will primarily use the **Students** tab to complete work.

Saving Changes

After a change is made it is very important to click the 'Update the Database' button at the bottom of each screen to save the changes. 'Update the Database' is equivalent to *Save*. **Any information entered will be lost if users forget to click 'Update the Database'.**
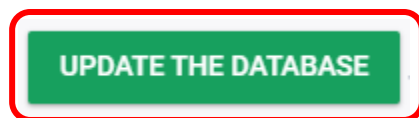
Important Symbols in ECATS

Below is a list of icons, and a description of their functionality, that appear on many system pages:

	Help - This link shows general help information.
	Drop-down menu - Only one selection can be made. Click once on the box and select an option.
	Check box - More than one selection can be made. To add or remove a check, click once on the box.
	Spell Check icon – Click on the icon to launch the spell check function for a specific text box.
	Calendar icon – To add a date, click on the calendar and scroll through the screens to find the appropriate date.
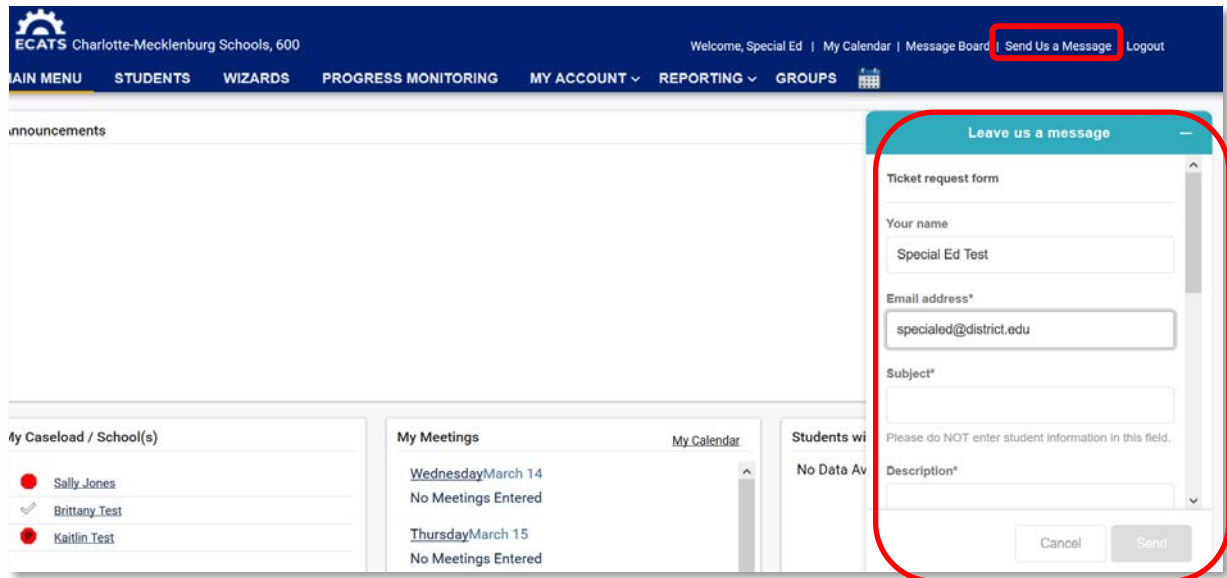
Logging into the System

To login to ECATS, go to the NCEdcloud IAM Service and select the icon for ECATS. If you do not have a login to NCEdcloud IAM Service, you need to claim your account or have a State Staff UID account created. Contact your local State Staff UID representative.

MAIN MENU TAB

Questions/Issues/Suggestions

To inform the Helpdesk of any issue, use the '*Send Us a Message'* via the link on the ECATS Main Menu page. This will prompt a web form to open in order to submit a ticket.

Users will be prompted to enter the following ticket fields:
- **Your name** – This will auto populate with your name
- **Email address** – This will auto populate with the email set on your ECATS profile – IMPORTANT: this should NOT be changed when submitting a ticket.
- **Subject** - Enter a subject line (*required)
- **Description** – Describe your question/issue (*required)
- **Module** – Select the module that relates to your ticket – Special Education, Service Documentation, MTSS, etc. (*required)
- **Student** – Enter in a student name, student ID etc., if applicable
- **Page Title** – Indicate the page related to your question/issue
- **Attachment** – Upload attachments to help explain your issue/question

Once the Helpdesk responds to your message, you will receive an e-mail (to the address listed within your ECATS profile) informing you that you have a new message. All messages and responses are sent internally within the system.

Reviewing previously submitted tickets

Users can access previously submitted tickets by logging into ECATS and selecting the "Message Board" link.

Accessing Messages Related to Alerts

To access a new message related to an Alert, click on 'My Messages'. This will direct you to the following screen, which displays *New Messages*, as well as stores your *Previous Messages.*
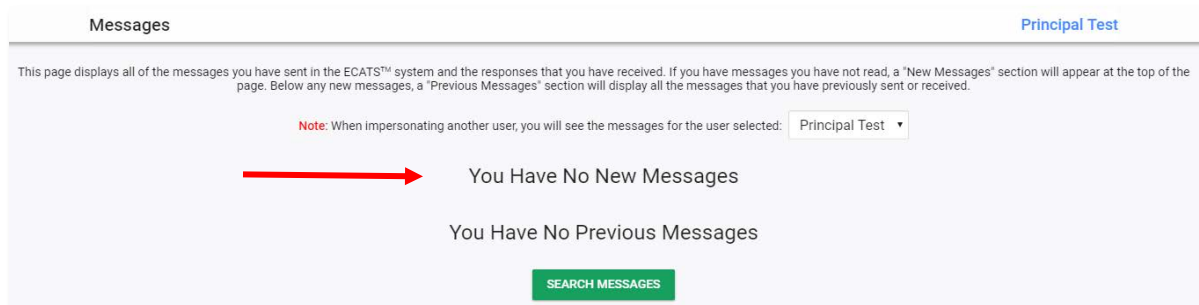
Once you have read all new messages, you will no longer see the 'New Mail' icon on your Main Menu screen.

Announcements

On the Main Menu page, you will find Announcements. This message is edited by your district's administrators and/or NCDPI EC Division and will alert you of any important information. Please check this message each time you log in to stay informed with state or district wide changes or updates.

Document Library

At the bottom of the Main Menu page you will see any files that have been made available to you for viewing or downloading. To view a file, click on the name of the file (denoted by a blue hyperlink). The file will open and you will have the option of saving it to your computer. When you are finished viewing the file, click on the "Main Menu" tab at the top of your screen. Do not close your browser, as you are still logged in to ECATS.

STUDENTS SECTION

Student Overview

When searching for students, please remember that districts are using a separate Student Information System (PowerSchool) that provides information to ECATS. If the student you are looking for does not display, please contact your district administrator. The system will only allow a certain number of students to appear on the search results screen at once. Narrow the search by entering the student's ID, school, or choosing either *General Education, Initial Eligibility or Current Reevaluation, IEP, Special Education, or Referral* and the beginning letters of the child's last name. Some users might not be able to search for students and may only be able to view their individual caseload.

1) From the Main Menu, click the "Students" tab.
2) Enter the criteria to search by, such as *Student Last Name* or *Student ID*.

3) The student's record will appear if that student fits the entered criteria or a list of students with the same last name exists in the database.
4) To select a specific student record, click on the name of the student.

Select a Student

Del	CP	Last Elig	Last IEP	School	Grade	Name	Student ID	Age	Dis	Case Manager	IEP Begin	IEP End
☐	✓.			Import	2	Aimee Test	AIMEETEST	8 Years	AU			
☐	✓.			Import	5	Brittany Test	10182017TEST	11 Years				
☐	✓.			Import	2	Colin Test	TEST019394	6 Years	AU	Jonathan Test		
☐	✓.					elig test	1645791354	9 Years	MU			
☐	✓.	02/07/2019	02/07/2019	Import	5	Joshua F Test	TEST123	10 Years	DB,DD,IDMO	Admin Test	02/07/2019	02/06/2020
☐	🔴.	02/28/2015	05/18/2018	Import	2	Kaitlin Test	KAITLINTEST	8 Years	IDMO	Admin Test	05/18/2018	05/16/2019

(6 Students)

Viewing Caseloads

Once assigned to a student's IEP team, users have a 'View My Caseload' button that will direct to the user's entire caseload. Within two simple clicks a student record can be added.

1) Click the 'View My Caseload' button at the bottom of the Student Search page.

2) The following *Select a Student* page will list all the students who you serve via the "Team" tab, either as a case manager or as a team member. Any students who you are the case manager of will be listed at the top of the page with a gray background.

Select a Student (Caseload of Special Ed Test)

CP	Last Elig	Last IEP	School	Grade	Name	Student ID	Age	Dis	Case Manager	IEP Begin	IEP End
✓			Import	2	Aimee Test	AIMEETEST	8 Years	AU			
✓			Import	5	Brittany Test	10182017TEST	11 Years				
✓			Import	2	Colin Test	TEST019394	6 Years	AU	Jonathan Test		
✓	02/07/2019	02/07/2019	Import	5	Joshua F Test	TEST123	10 Years	DB,DD,IDMO	Admin Test	02/07/2019	02/06/2020
🔴	02/28/2015	05/18/2018	Import	2	Kaitlin Test	KAITLINTEST	8 Years	IDMO	Admin Test	05/18/2018	05/16/2019

(5 Students)

Student Compliance Overview

Every student in ECATS has a compliance symbol associated with their name. When viewing the caseload, the compliance symbols are a quick way to see which students are in or out of compliance, as well as students who have approaching deadlines. Definitions of compliance symbols are located below.

			Import	2	Colin Test	TEST019394	6 Years	AU	Jonathan Test		
✓	02/07/2019	02/07/2019	Import	5	Joshua F Test	TEST123	10 Years	DB,DD,IDMO	Admin Test	02/07/2019	02/06/2020
🔴	02/28/2015	05/18/2018	Import	2	Kaitlin Test	KAITLINTEST	8 Years	IDMO	Admin Test	05/18/2018	05/16/2019

Compliance Symbol Definitions

Symbol	Meaning
T	It has been > 1095 days (3 years) since this student's Eligibility Date. A triennial re-evaluation is due.
T	It has been > 1035 days since this student's Eligibility Date. A triennial re-evaluation is due within 2 months.
●	It has been > 365 days since this student's Last IEP Date
△	It has been > 335 days since this student's Last IEP Date
E	Warning: It has been > 90 days since this student's Referral Date and Eligibility has not yet been determined. The 90-day timeline is due.
E	Warning: It has been >77 days since the initial referral. The 90-day timeline is due soon.
✔	The student has a current eligibility and a current IEP/PSSP.
✓	This student is classified as a general education student.
T	STOP: It has been > 1095 days (3 years) since this student's Eligibility Date. The student's eligibility has expired. A triennial re-evaluation is due.
T	WARNING: It has been > 1035 days since this student's Eligibility Date. A triennial re-evaluation is due within 2 months.
●	STOP: It has been > 365 days since this student's IEP was developed. The current IEP has expired.
△	WARNING: It has been > 335 days since this student's IEP was developed. The current IEP will expire soon.
E	STOP: It has been >97 days since the initial referral. The 90-day timeline has been exceeded.
E	Warning: It has been >77 days since the initial referral. The 90-day timeline is due soon.
✔	The student has a current eligibility and a current IEP/PSSP.
✓	This student is currently classified as a general education student.

REPORTING TAB

The "Reporting" tab on the Main Menu allows users to run reports, view reports and create new reports.

To Run a Standard Report:
1) From the Main Menu – Click on the "Reporting" tab.
2) Select "Standard Reports" from the drop-down menu.
3) A table for Drill-Down Reports displays under the "Standard Reports" header. These reports will allow users to "drill down" into data by narrowing search criteria. Hovering over the report name will provide a short description of the report and the data it will pull.

4) A table for Scheduled Reports displays at the bottom of the page. Choose the appropriate tab and click on the hyperlink for the desired report to run it.
   a. Hovering over the report name will provide a short description of the report and the data it will pull.
   b. When the report is complete users will receive an email notification.
   c. The time required to generate a report is reflective of the amount of data returned and how many other reports are already scheduled to run. Reports with very large amounts of data will run at midnight.

d. After a report has been run, users can find the results by navigating to the "My Reports" link under the "Reporting" tab. Click on the hyperlink to view the report.

STUDENT INFORMATION

Profile Tab

After selecting a student, the Personal Information containing basic demographic data for that student will appear. This information is imported from your student information system (PowerSchool). The "Personal Information" tab in ECATS is accessible as *view only*. To maintain data integrity, users are not permitted to edit information on this page.

Access Student Profile

1) Hover over the "Student Information" dropdown click on the "Profile" tab.

2) The Student Profile will be displayed as the default page when users click on a student's name. Within this page a student's basic demographics and other information will be displayed.

3) Next, the "Performance Data" tab will show assessment information for the student and can be filtered by school year.

4) Next, the "Grades" tab will show grades for the student and can be filtered by school year.

5) Next, the "Attendance" tab will show attendance for the student and can be filtered by school year.

6) Next, the "Special Education" tab will show major dates and information within the student's special education timeline.

PARENTS/STUDENT TAB

From the student specific menu bar, the "Parents/Student" tab is used to add parents and guardians. It is also used to add team members who participate from outside agencies and, if applicable, the student.

To Access: Hover over the "Student Information" dropdown and select the "Parents/Student" tab.

Making Edits:
1) Within this page a user can update parent and/or guardian information. As information is updated on this page click the "Update the Database" button to save changes.
2) Click the "Details" button next to the current parent information to edit more details regarding the parent and/or guardian. As information is updated click the "Update the Database" button to save changes.

To add an individual to this page:
1) Click the 'Add New Parent/Guardian' button.

2) Enter all the relevant information.
   a. *Student Lives Here* must be checked for at least one parent/guardian.
   b. If the person should appear on the IEP Team, check *Include on IEP Team*.
3) Click the 'Update the Database' button.

Associating Parents:

1) Click "Associate with Existing Parent/Guardian" button to associate another student's parent/guardian with the current student. Search for the parent/guardian by the filters/options on the page and click "View Parent(s)."

2) Click on the parent/guardian that should be associated with the student's record.

3) Select the relationship of the parent/guardian to the student, home and/or team information and select the "Update the Database" button to save the parent/guardian to the student's record. Edit the Parent information by clicking the "Details" button.

TEAM TAB – IEP TEAM AND CASE MANAGER

1) Hover over the "Student Information" tab in the menu bar and click on "Team" from the "Student Information" menu.

2) Within this page users can assign the case manager to the student as well as select the IEP team members. Select a case manager from the dropdown and click "Update the Database" to assign the case manager to the student.

3) Click the "Select IEP Team" button to assign other IEP team members to the student's team. Once necessary members are selected click "Update the Database" to ensure team members have been saved to the student's record. Check the checkbox in the "View Only" column for those team members who will need access to view the student record but should not be able to edit any of the data within it.

Select IEP Team Members   Brittany Test

Case Manager: Michael Johnson

Parents, etc. who will receive IEP Information:

Parent Name(s)	Relationship
☑ Mrs & Mrs Test	Both Parents
☐ Martha Test	Aunt

Other Users at Test School who can access IEP Information:

User Name	View Only?
☑ Test, Clinician, Test User	☐
☐ Test, Unsupervised, Unsupervised Clinician	☐
☐ Test, Special Ed, Special Education Teacher	☐
☐ Test, General Ed, General Education Teacher	☐
☑ Test, Principal, Principal	☐
☐ Test, Speech	☐
☐ Test, PT	☐

Users associated with all Schools who can access IEP Information:

User Name	View Only?
☐ Alhour, Julien, NC DPI Staff	☐
☐ Blas, Kelley, NC DPI Staff	☐
☐ Fiegler, Lorie, NC DPI Staff	☐
☐ Herring, Ashley, NC DPI Staff	☐
☐ Holahan, Lauren, NC DPI Staff	☐
☐ Hudgens, CarolAnn, NC DPI Staff	☐
☐ Humphreys, Vicki, NC DPI Staff	☐
☐ Hussy, Bill, NC DPI Staff	☐
☐ Jablonski, Amy, NC DPI Staff	☐
☐ Johnson, Nancy, NC DPI Staff	☐
☐ Kincaid, Jordan, NC DPI Staff	☐
☐ Miller, Amy, NC DPI Staff	☐
☐ OFarrow, Khaliah, NC DPI Staff	☐
☐ Ogburn, Erik, NC DPI Staff	☐
☐ Parker, Quentin, NC DPI Staff	☐
☐ Ray, Laurie, NC DPI Staff	☐
☐ Schmidt, Paul, NC DPI Staff	☐
☐ Sims, Jennifer, NC DPI Staff	☐
☑ Stalnaker, SueAnn, NC DPI Staff	☐
☐ Test, Admin, Test User	☐
☐ Thomas, Sherry, NC DPI Staff	☐

...on this Student's IEP Team who is not a user in this system, you will need to first add that person on the "Parents" page, which allows adding other persons besides parents, e.g. a Student's doctor, c...

UPDATE THE DATABASE ?

CONTACTS TAB

1) Hover over the "Student Information" tab in the menu bar and click on "Contacts" from the "Student Information" menu.

2) Within this page users can add a contact attempt that was made by clicking the "Add a Contact" or "Add a Non Parent Contact" button. Click the "Details" button to edit a contact log that has already been saved.

STUDENT HISTORY TAB

1) Hover over the "Student Information" tab in the menu bar and click on "Student History" from the "Student Information" menu.

2) Within this page the student's history of events will display. Users can also choose to view any user actions made to the student's record.

3) Click "View User Actions" to see the actions taken by users within the student's record. Fill out the search criteria and select the "Show User Actions" button.

View User-Student Actions — Brittany Test

Changes to Brittany Test's records between 12/19/2017 and 01/19/2018

User	Date	Type	Category	Action
Michael Johnson	01/12/2018 13:38:53	View	FlexibleInterface	Entered FlexibleInterfacePage50 (EDPlan Student Profile)
Michael Johnson	01/12/2018 13:39:00	View	FlexibleInterface	Entered FlexibleInterfacePage2 (Referral)
Michael Johnson	01/12/2018 13:39:06	Update	StudentCustomData	Modified: REF_ReferralType: (SAR)
Michael Johnson	01/12/2018 13:39:06	View	FlexibleInterfacePage2.htm	Entered FI Section: FlexibleInterfacePage2.htm
Michael Johnson	01/12/2018 13:39:08	View	ReferralInformation.htm	Entered FI Section: ReferralInformation.htm
Michael Johnson	01/12/2018 13:39:19	Update	StudentCustomData	Modified: REF_ReferralDate: (01/11/2018)
Michael Johnson	01/12/2018 13:39:41	Update	StudentCustomData	Modified: REF_ReferralSource: (18) REF_ReferralDate: (01/11/2018)
Michael Johnson	01/12/2018 13:40:14	Update	StudentCustomData	Modified: REF_ReferralSourcePos: (Dad) REF_ReferralSource: (18) REF_ReferralDate: (01/11/2018)
Michael Johnson	01/12/2018 13:41:38	Update	StudentCustomData	Modified: REF_ReferralCopy: (01/23/2018) REF_ReferralSourcePos: (Dad) REF_ReferralTransfer: (No) REF_Referra REF_ReferralDate: (01/11/2018)
Michael Johnson	01/12/2018 13:42:04	View	FlexibleInterface	Entered FlexibleInterfacePage2 (Referral)
Michael Johnson	01/12/2018 13:42:11	View	ReferralInformation.htm	Entered FI Section: ReferralInformation.htm
Michael Johnson	01/12/2018 13:42:38	View	FlexibleInterface	Entered FlexibleInterfacePage2 (Referral)
Michael Johnson	01/12/2018 13:42:41	View	AssessmentSummary.htm	Entered FI Section: AssessmentSummary.htm
Michael Johnson	01/12/2018 14:00:05	View	FlexibleInterface	Entered FlexibleInterfacePage50 (EDPlan Student Profile)

4) Finalized documents/events can be removed by authorized users within each LEA.

INVITATION DOCUMENTS TAB

INVITATION TO IEP TEAM MEETING

1) Hover over the EC Process tab in the menu bar and click on "Invitation Documents" from the menu. On the Invitation Documents page, click on the section titled "Invitation to IEP Team Meeting."

2) Fill in the fields on the document creation page including the applicable dates, the meeting participants, and other information. Note that if outside agencies are attending, additional fields will display and dates consent to participate was provided by the parent are required.

3) At the bottom of the page, click the "Create Draft Invitation to IEP Team Meeting Document" button.

> CREATE DRAFT INVITATION TO IEP TEAM MEETING DOCUMENT
>
> CREATE FINAL INVITATION TO IEP TEAM MEETING DOCUMENT
>
> BACK
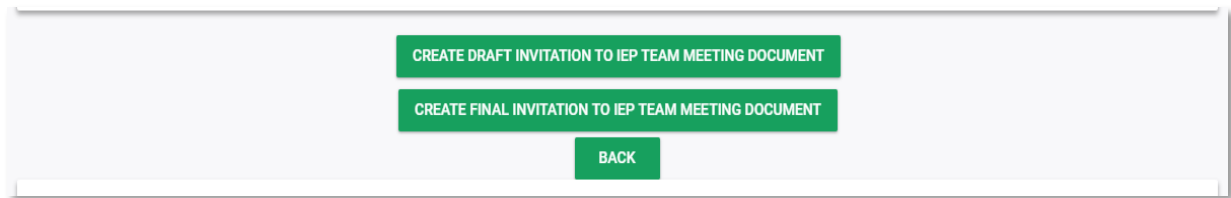
4) Any errors found on the document creation page will display in a red box at the top of the Download Invitation to IEP Team Meeting page. (Users may still view the draft document without correcting these errors, but will not be able to finalize the document.)

> Download Invitation To IEP Team Meeting   Brittany Test
>
> The following errors have been found on this page:
> You must select a parent/guardian to whom the invitation is addressed.
> You must enter the date the invitation was sent.
> You must select a meeting purpose.
> You must enter the date the meeting will take place.
> You must enter the time the meeting will take place.
> You must enter the location the meeting will take place.
> You must select at least one IEP Team Member who will attend the meeting.
> You must indicate whether any outside agencies/community organizations will be attending the IEP Team meeting.
>
> Draft documents are not official documents. They are intended for review only.
>
> Invitation To IEP Team Meeting: view
>
> BACK   CONTINUE

a. Click on the "Back" button at the bottom of the page to navigate back to the document creation page to make changes.
b. Click on the "Continue" button to navigate back to the main Invitation Documents page.
c. Click on the "view" hyperlink at the bottom to view the draft PDF document in a new browser tab.
d. Once all errors are corrected and the user is ready to finalize the document, click on the "Create Final Invitation to IEP Team Meeting Document" button at the bottom of the document creation page.

> CREATE DRAFT INVITATION TO IEP TEAM MEETING DOCUMENT
>
> CREATE FINAL INVITATION TO IEP TEAM MEETING DOCUMENT
>
> BACK
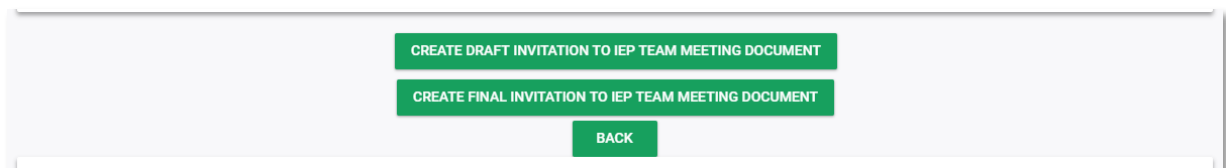
e. The link to the created document can be accessed from the bottom of the Invitation to Team Meeting document creation page or from the Documents tab.

INVITATION OF OUTSIDE AGENCIES FOR TRANSITION SERVICES

1) Hover over the EC Process tab in the menu bar and click on "Invitation Documents" from the menu. On the Invitation Documents page, click on the section titled "Invitation of Outside Agencies for Transition Services."
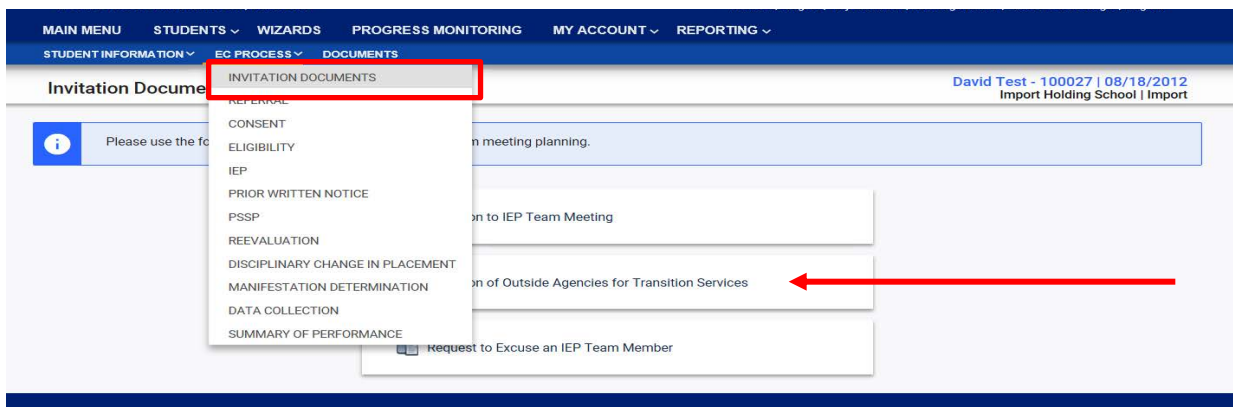
2) Fill in the fields on the document creation page. If the user selects that the rights have transferred to the student, the document will be addressed to him/her. If not, select the addressee from the dropdown that will appear.

STUDENT INFORMATION ⌄ EC PROCESS ⌄ PLAN OF CARE PREK TRANSITION DOCUMENTS

Create Invitation of Outside Agencies   Brittany Test

Have rights outlined in procedural safeguards
transferred to the student?   [▼]

Date sent: [   ] 📅

Outside agency participants expected to attend the meeting for the purpose of transition services:

Name   Agency

[   ]   [   ]

[   ]   [   ]

[   ]   [   ]

3) At the bottom of the page, click the "Create Draft Invitation of Outside Agencies Document" button.

CREATE DRAFT INVITATION OF OUTSIDE AGENCIES DOCUMENT

CREATE FINAL INVITATION OF OUTSIDE AGENCIES DOCUMENT

BACK

ⓘ No Invitation of Outside Agencies Documents have been generated for this student.

4) Any errors found on the document creation page will display in a red box at the top of the Download Invitation of Outside Agencies page. (Users may still view the draft document without correcting these errors, but will not be able to finalize the document.)

Download Invitation of Outside Agencies   Brittany Test

❗ The following errors have been found on this page:
You have not indicated whether or not the rights outlined in procedural safeguards have been transferred to the student. Please select Yes or No from the dropdown.
You must enter the date the consent to invite outside agencies was sent.
You have not listed any outside agencies to be invited. You must add the name of at least one outside agency participant.

ⓘ Draft documents are not official documents. They are intended for review only.

Invitation of Outside Agencies: view

BACK   CONTINUE

a. Click on the "Back" button at the bottom of the page to navigate back to the document creation page to make changes.
b. Click on the "Continue" button to navigate back to the main Invitation Document page.
c. Click on the "view" hyperlink at the bottom to view the draft PDF document in a new browser tab.

d. Once all errors are corrected and the user is ready to finalize the document, click on the "Create Final Invitation of Outside Agencies Document" button at the bottom of the document creation page.
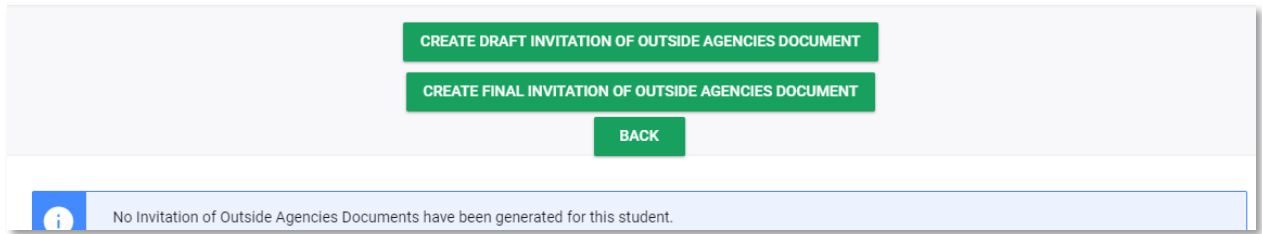
e. The link to the created document can be accessed from the bottom of the Invitation of Outside Agencies document creation page or from the Documents tab.

REQUEST TO EXCUSE AN IEP TEAM MEMBER

1) Hover over the EC Process tab in the menu bar and click on "Invitation Documents" from the menu. On the Invitation Documents page, click on the section titled "Request to Excuse an IEP Team Member."
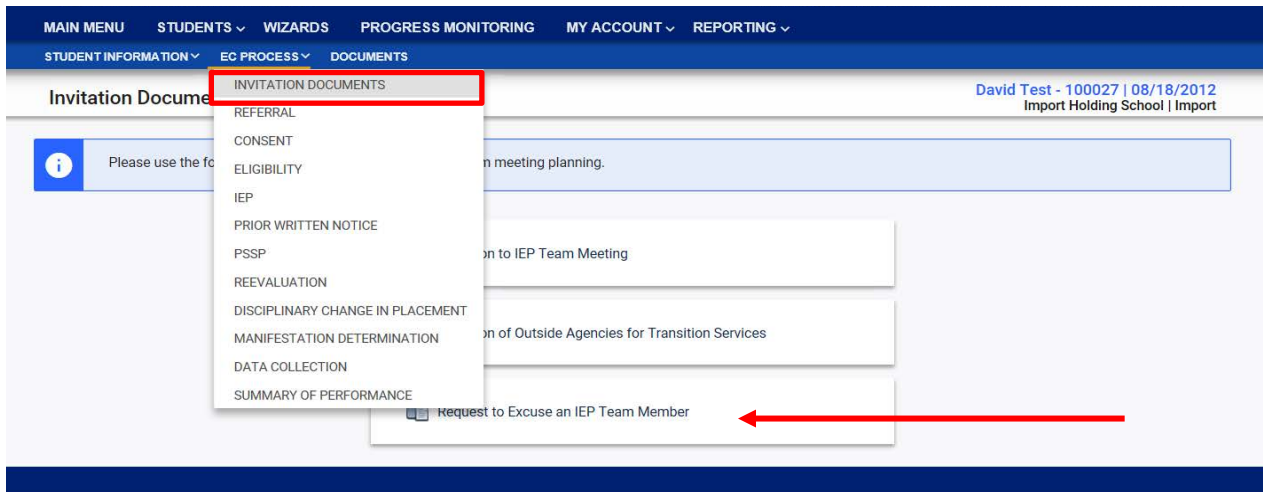
2) Fill in the fields on the document creation page.

Create Request to Excuse an IEP Team Member   Brittany Test

Request To Excuse Required IEP Team Members

Date sent: 12/22/2017

Have rights outlined in procedural safeguards transferred to the student? No

Dear:

The following required members of the IEP team will not attend the meeting; however, they will participate by providing written input to all team members prior to the meeting:
☐ LEA Representative   ☐ Special Education Provider(s) of the Student
☐ General Education Teacher(s) of the Student   ☐ Interpreter of Instructional Implications of Evaluation Results

The following required members of the IEP team will not attend the meeting because their curriculum area is not being discussed:
☐ LEA Representative   ☐ Special Education Provider(s) of the Student
☐ General Education Teacher(s) of the Student   ☐ Interpreter of Instructional Implications of Evaluation Results

3) At the bottom of the page, click the "Create Draft Request to Excuse an IEP Team Member Document" button.

CREATE DRAFT REQUEST TO EXCUSE AN IEP TEAM MEMBER DOCUMENT

CREATE FINAL REQUEST TO EXCUSE AN IEP TEAM MEMBER DOCUMENT

BACK

4) Any errors found on the document creation page will display in a red box at the top of the Download Request to Excuse an IEP Team Member page. (Users may still view the draft document without correcting these errors, but will not be able to finalize the document.)

Download Request to Excuse an IEP Team Member   Brittany Test

⊗ The following errors have been found on this page:
You have indicated that the rights outlined in procedural safeguards have not been transferred to the student, but you have not selected a parent or guardian to address the request to. Please select a parent/guardian from the dropdown.
You have not selected any IEP Team Members to excuse. Please select at least one IEP Team Member who will not attend the meeting.
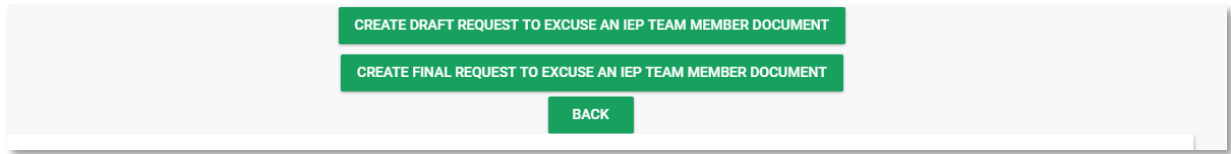
ⓘ Draft documents are not official documents. They are intended for review only.

Request to Excuse an IEP Team Member: view

BACK   CONTINUE

a. Click on the "Back" button at the bottom of the page to navigate back to the document creation page to make changes.
b. Click on the "Continue" button to navigate back to the main Invitation Document page.
c. Click on the "view" hyperlink at the bottom to view the draft PDF document in a new browser tab.

d. Once all errors are corrected and the user is ready to finalize the document, click on the "Create Final Request to Excuse an IEP Team Member" button at the bottom of the document creation page.

e. The link to the created document can be accessed from the bottom of the Request to Excuse an IEP Team Member document creation page or from the Documents tab.

REFERRAL PROCESS TAB

1) Hover over the EC Process tab in the menu bar and click on "Referral" from the dropdown menu. On the Referral Process page, users will see the links for each section in the process. Select the type of referral being completed for the student from the dropdown at the top (either School Age Referral or Pre-K Referral.) This will determine which sections appear below. If there is no data entered in any of the sections, the compliance check marks will appear clear. As data is entered and saved in each section, the check marks will change to green check marks (all error checks are met) or red X signs (there are errors within that section that need to be addressed before a final document can be created.)
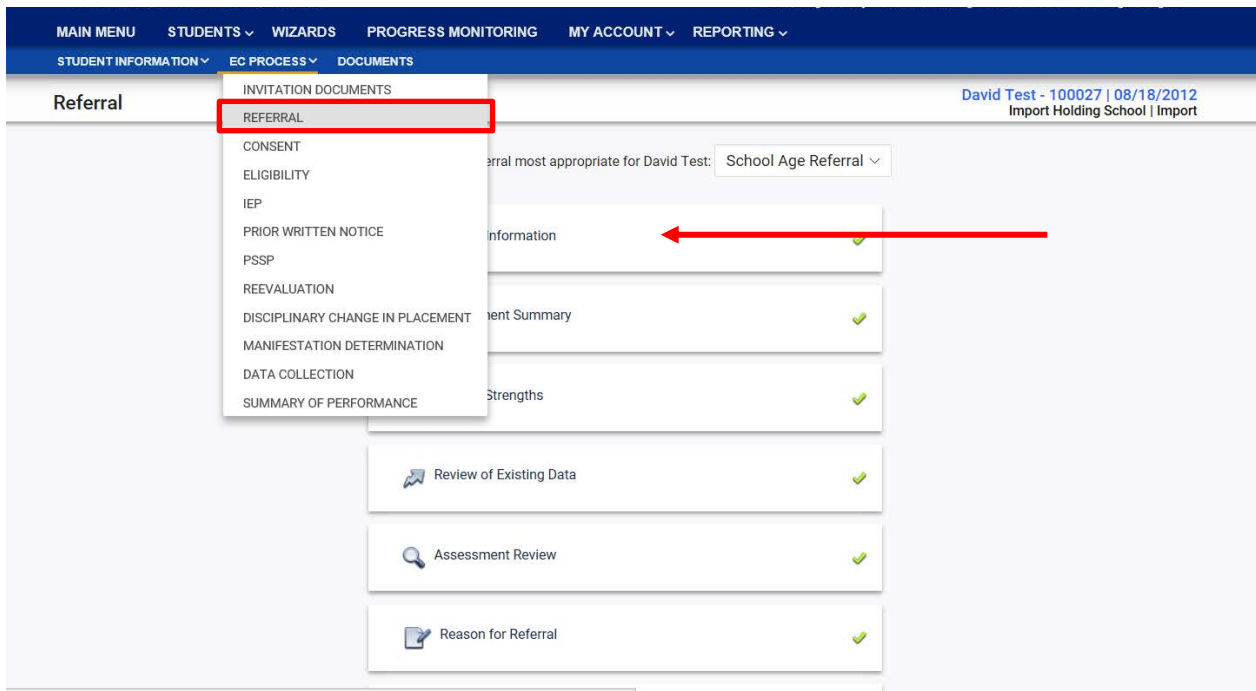
2) Click on the first section in the process, "Referral Information." Fill in the referral date, the referral source, the title/position of the referral source and the other applicable information.

3) At the bottom of the page, click the "Save and Continue" button. Any errors found in this section will display in a red box at the top of the page.

Referral Information   Jordan Test

The following errors have been found on this page:
You must indicate the date the referral was made.
You must include a referral source.
You must indicate the position of the referral source.
You must indicate which parent/guardian/student the referral was sent to.
You must indicate when a copy of the referral was sent to the parent/guardian/student.
You must indicate whether the student is transferring from another state with a current IEP.

4) If there are no errors on the page, users will be brought to the "Assessment Summary" section. Click on the "Add Assessment(s)" button to add assessments to the table. Note that existing data is entered here as well as data gathered after the evaluation plan is completed.

Assessment Summary   Jordan Test

Del	Pos	New Pos	Date	Assessment Area	Assessment	Subject Area	Scores Reported	Actions
☐	1		11/29/2017	Adaptive Beha ▾	Adaptive Behavior - Adaptive Behavior Assessment System -2nd Edition (ABAS-II) - Parent Form	General Adaptive Composite (GAC)	Std Score	DETAILS LOG
☐	2		11/29/2017	Audiological ▾	Test Custom Assessmen	Test Area	Grade Equiv quotient	DETAILS LOG

ADD ASSESSMENT(S)   ADD MULTIPLE ASSESSMENT(S)
BACK   SAVE   SAVE & CONTINUE >>

5) Select the Assessment Area and the Assessment name from the dropdowns. Based on the assessment selected, the Subject Area and the Scores Reported associated with that assessment will populate. Add comments in the Comments text box provided.

Add Assessments   Jordan Test

Assessments | Custom Assessments

Assessment Area	Assessment	Subject Area	Score(s) Reported	Comments
Speech/Language ▾	Adaptive Behavior - Adaptive E ▾	Conceptual ▾	☑ Std Score ☐ Age Equiv ☐ Grade Equiv ☐ Percentile ☐ # Errors ☐ Stanine ☐ Quotient ☐ t score ☐ Narrative	comments
▾	▾	▾		

6) If users do not see the assessment they are looking for in the Assessment dropdowns, users may add a custom assessment via the Custom Assessments tab. This table will allow users to manually type in the assessment information.

7) Click the "Save and Continue" button at the bottom of the page and users will be brought back to the Assessment Summary page. The assessments added will be added to the table, and manually type in the date, or select a date via the calendar icon for that assessment. Delete the assessment by selecting the checkbox next to it and clicking the "Save" button at the bottom of the page.

8) Add multiple assessments by selecting the "Add Multiple Assessments" button. Select a category from the Assessment Category dropdown and users will see the assessments associated with that category populate below. Select one or multiple and click the "Add Area(s) and Score(s)" button.
   a. Note: to quickly find key assessments, press the buttons "Ctrl"+"F" on the keyboard for PC ("Command"+"F" for MAC). This will open up the browser's find function, to type in the name.

9) Fill in the information associated with the assessments selected on that page. Use the "+" button to add information about subsequent assessments.

10) Once all the assessments are added, click the "Save and Continue" button at the bottom of the page. If there are no errors on the page, users will be brought to the "Student Strengths" section. This page allows users to type in data regarding the student's strengths in each area. All areas must be addressed.

11) Click "Save and Continue" on the "Student Strengths" page. If there are no errors on the page, users will be brought to the "Review of Existing Data" section. This page is made up of a series of expand/collapse tables that allow users to add and remove data applicable to the referral process for the student.

12) To expand a table, click on the "+" button. Users will see fields where data applicable to that area can be added. If no data is available for that particular area, users can check the "No data is available for this area" checkbox. Click on the "Add/Remove Existing Data" button to add data from other sources.

13) After clicking on the "Add/Remove Existing Data" button for a particular table, users will be brought to another page with expand/collapse sections where users can add Assessments, Attendance, Grades, and Progress Track data, if available. Click on the plus/minus signs to expand and collapse each table. Click the "Save and Continue" button to be brought back to the "Review of Existing Data" page.

    a. Note: that to stay in compliance, any assessments conducted for the purposes of making a referral determination (including observations, hearing screenings, and vision screenings) cannot be conducted without informed consent.

14) Click the "Save and Continue" button and if there are no errors on the page, users will be brought to the "Assessment Review" section. Users will see all of the assessment areas, and will be able to select assessments for each of the areas determined on the "Assessment Summary" section in the process.

15) Click the "Select Assessments" button to add assessments to each area. The available assessments (added from the "Assessment Summary" page) will display as checkboxes. If no assessments were added to a specific assessment area on the "Assessment Summary" page, no assessments will display. Click the checkbox to select the assessment, and click the "Save and Continue" button. The assessment(s) selected will then be added to the table on the "Assessment Review" page.

16) Repeat these steps for each applicable Assessment Area. Click "Save and Continue" on the "Assessment Review" page once finished with the applicable areas. If there are no errors on the page, users will be brought to the "Reason for Referral" section. On this page, users can enter data into the textbox for the targeted area(s) of need.

17) Click "Save and Continue" on the "Reason for Referral" page. If there are no errors on the page, users will be brought to the "IEP Team Determination" section. On this page, users can select the Areas of Suspected Disability by selecting from the dropdowns. Three dropdowns display; if the student has more than three areas of suspected

disability, users can click the "Add" button to add additional dropdowns. Users can also indicate the IEP Team determination on this page.

18) Clicking the "Are All Areas Met for Eligibility Determination" button will provide a message that indicates whether or not all areas have been met for eligibility determination for the specific disability(ies) selected. Based on the IEP Team Determination, if an evaluation is not needed, an explanation in the text box below that option will be a required field.

IV. IEP Team Determination (Select One)

○ Based upon the review of existing data, the evidence does not support a suspected disability. Therefore, an evaluation will not be conducted. The special education process ends.

> ℹ Explain decision not to evaluate (to be included as part of refusal documentation on the Prior Written Notice)

Explanation: [   ]

○ Eligibility for special education and related services is being determined by existing evaluation data made available to the IEP Team through the Special Education Referral. NO additional evaluation(s) are needed to determine eligibility.

Explanation: [   ]

> ℹ Note: Assessment information and evaluation data used to make this determination can be found on the assessment summary page. (Note: this data must meet the requirements of the eligibility worksheet(s) Note: To use this option, existing data must consist of all components required for eligibility by NC Policies Governing Services for Children with Disabilities. The IEP Team completes the Eligibility Worksheet(s), Eligibility Report, Prior Written Notice, develops/proposes an IEP and obtains Consent for the Provision of Services. Provide the parent/guardian/student a copy of each document and the Parents Rights and Responsibilities in Special Education: Notice of Procedural Safeguards.

○ Conduct an initial evaluation, eligibility cannot be determined by the review of existing data.

> ℹ Note: Obtain parent/guardian/student consent for the evaluation plan. Once provided, all requested evaluations on the evaluation plan must be completed. The team must reconvene to determine to determine eligibility and develop an IEP or PSSP if appropriate. If consent for evaluation is not given, the referral process ceases.

19) Once users have completed the data fields on the "IEP Team Determination" page, click the "Save and Continue" button. If there are no errors on the page, users will be brought to either the Evaluation Plan page or "Create Draft/Create Final" section.

20) If applicable, the Evaluation Plan page allows users to select evaluations that are needed based upon the student's suspected area of disability and the IEP Team determination. Check the appropriate boxes and then click "Save and Continue".

Screenings and Evaluations

Screening(s)/Evaluation(s) Needed:

☐ *Review of educational history/records
☐ *Review of existing data
☐ *Review of existing data/RtI documentation of problem-solving
☐ *Summary of Conference(s) with parents
☐ Adaptive Behavior Evaluation
☐ Assessment/behavior rating tool specific to Autism
☐ Audiological Evaluation

☐ Behavioral/Emotional Evaluation
☐ Braille Skills Inventory and/or Media Assessment
☐ Braille Skills Inventory/Learning Media Assessment
☐ Educational evaluation
☐ Functional Vision Assessment
☐ Health Screening

☐ Medical Evaluation
☐ Motor Evaluation
☐ Motor Screening
☐ Observation
☐ Opthalmological or optometric evaluation
☐ Otological evaluation

☐ Progress Monitoring
☐ Psychological evaluation
☐ Social/Developmental History
☐ Speech-language screening
☐ Speech-Language/Communication Evaluation
☐ Vocational Evaluation

BACK   SHOW SECTION   SAVE   SAVE & CONTINUE >>

21) On this page, users can select the meeting dates and the meeting participants. Click the "Excused" check box next to the participant's name to indicate that they are excused from the meeting.

22) At the bottom of the page is a button to create a draft document. Drafts can be created while there are still errors within the process; final documents cannot be created until all errors are corrected. Once the process is free of errors, the "Create Final" button will display, allowing the user to create a final document and the associated referral event. Once finalized, the 90 day timeline compliance symbol will begin displaying based upon the date referred entered at the beginning of the referral process.

23) Created documents can be viewed by clicking on the hyperlink for the document at the bottom of the Create Draft/Create Final (i.e. where the "Create Draft Document" and "Create Final Document" buttons are) page and on the Documents tab.

CONSENT TAB – CONSENT TO EVALUATE
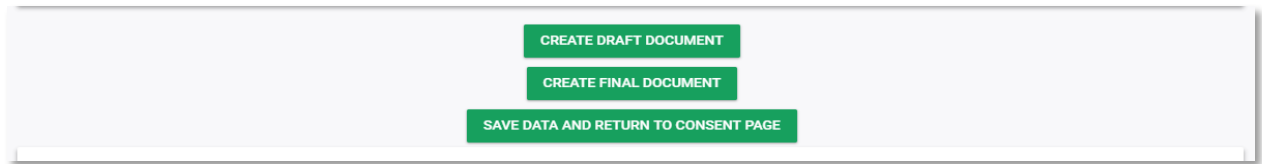
1) Hover over the EC Process tab in the menu bar and click on "Consent" from the menu. On the Consent page, click on the section for "Create Consent to Evaluate."

2) Fill in the fields on the document creation page.
   a. Note: Areas where consent to evaluate are being collected are indicated as part of the evaluation plan on the referral document. Check the list of areas displaying to ensure it is consistent with selections made.

3) At the bottom of the page, click the "Create Draft Document" button.

<div style="text-align:center">

CREATE DRAFT DOCUMENT

CREATE FINAL DOCUMENT

SAVE DATA AND RETURN TO CONSENT PAGE

</div>

4) Any errors found on the document creation page will display in a red box at the top of the Download Consent for Evaluation page. (Users may still view the draft document without correcting these errors, but users will not be able to finalize the document.) Click on the "Back" button at the bottom of the page to navigate back to the document creation page to make changes. Click on the "Continue" button to navigate back to the main Consent page. Click on the "view" hyperlink at the bottom to view the draft PDF document in a new browser tab.

Download Consent for Eval   *Jordan Test*
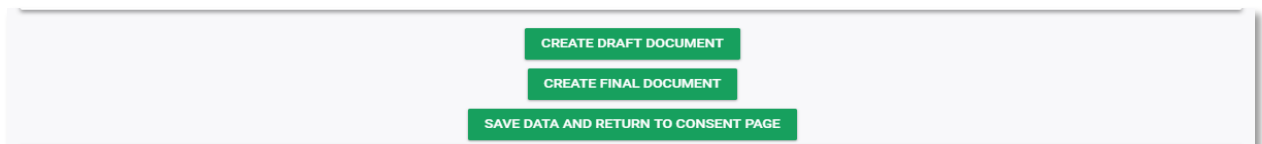
> ⊘ The following errors have been found on this page:
> You must select a parent/guardian to whom the consent is addressed.
> You must select a meeting purpose.
> You must enter the date the copy was given/sent.

> ⓘ Draft documents are not official documents. They are intended for review only.

Consent for Eval: view

BACK **CONTINUE**

5) Once all errors are corrected and users are ready to finalize the document, click on the "Create Final Document" button at the bottom of the document creation page.

<div style="text-align:center">

CREATE DRAFT DOCUMENT

CREATE FINAL DOCUMENT

SAVE DATA AND RETURN TO CONSENT PAGE

</div>

6) The section to the created document can be accessed from the bottom of the Consent for Evaluation/Reevaluation document creation page or from the Documents tab.

<div style="text-align:center">

SAVE DATA AND RETURN TO CONSENT PAGE

</div>

Consent for Eval - DEC 2 Documents

Document ID	Date Created	Created By	Document	Status
84	01/19/2018	Cory Wall	Consent for Eval - DEC 2	(Draft)

7) After a final Consent to Evaluate has been created, and once the parent has returned the document, return to the Consent process. Enter the required consent information and click "Submit Consent to Evaluate Response".

ELIGIBILITY PROCESS TAB

1) Hover over the EC Process tab in the menu bar and click on "Eligibility" from the menu. On the Eligibility Determination page, users will see the links for each section in the process.
   a. If there is no data entered in any of the sections, the compliance check marks will appear clear.
   b. As data is entered and saved in each section, the check marks will change to green check marks (all error checks are met) or red X signs (there are errors within that section that need to be addressed before a final document can be created.) Note: a red X for a process step DOES NOT indicate that the record is out of compliance. It means the step is not complete.

2) Click on the first section in the process, "Meeting Purpose and Suspected Disability." Select the meeting purpose and the areas of suspected disability from the dropdown options. The areas indicated on the referral will automatically be selected, but you can edit or add areas as required. Three dropdowns populate for "Area(s) of Suspected Disability." If it is necessary to add more than three, save the selections, click the "Add Area" button.

3) At the bottom of the page, click the "Save and Continue" button. Any errors found in this section will display in a red box at the top of the page.

4) If there are no errors on the page, users will be brought to the "Assessment Summary" section. Click on the "Add Assessment(s)" button to add assessments to the table.

5) Select the Assessment Area and the Assessment name from the dropdowns. Based on the assessment selected, the Subject Area and the Scores Reported associated with that assessment will populate. Add comments in the Comments text box provided.

6) If the assessment needed is not found in the Assessment dropdowns, users may add a custom assessment via the Custom Assessments tab. This table will allow users to manually type in the assessment information.

7) Click the "Save and Continue" button at the bottom of the page and users will be brought back to the Assessment Summary page.
    a. The assessments added will be populated to the table, and then users can manually type in the date, or select a date via the calendar icon for that assessment.
    b. Delete the assessment by selecting the checkbox next to it and clicking the "Save" button at the bottom of the page.

8) Add multiple assessments by selecting the "Add Multiple Assessments" button.
   a. Select a category from the Assessment Category dropdown and users will see the assessments associated with that category populate below.
   b. Select one or multiple and click the "Add Area(s) and Score(s)" button.
   c. Note: if you need to quickly find key assessments, press the buttons "Ctrl"+"F" on the keyboard for PC ("Command"+"F" for MAC). This will open up the browser's find function where users can type in the name.

9) Users can fill in the information associated with the assessments selected on that page.

10) Once all the assessments are added, click the "Save and Continue" button at the bottom of the page.
   a. If there are no errors on the page, users will be brought to the "Assessment Review" section.
   b. This page is split into three tabs. On the Summary of Required Screenings and Evaluations tab, users will see all of the assessment areas, and will be able to select assessments for each of the areas determined on the "Assessment Summary" section in the process.

11) Click the "Select Assessments" button for the areas to add assessments to. The available assessments (added from the "Assessment Summary" page) will display as checkboxes.

12) The assessment(s) selected will then be added to the table on the "Assessment Review" page. Repeat these steps for each applicable Assessment Area.

13) Click on the Vision Screening tab. Select whether or not Vision Screening data is available. If "No" is selected, users can move to the Hearing Screening tab. If "Yes" is selected, users can fill in the necessary data from the Vision Screening.

14) Once the Vision Screening data is entered, click "Save and Continue." Then click on the Hearing Screening tab. Select whether or not Hearing Screening data is available. If "No" is selected, move to the next section. If "Yes" is selected, fill in the necessary data from the Hearing Screening.

15) Click "Save and Continue" on the "Assessment Review" page. If there are no errors on the page, users will be brought to the "Eligibility Worksheets" section. On this page, strengths and needs data can be entered.

16) There are tabs for each area of suspected disability. On each tab are fields for the data necessary to complete the Eligibility Worksheet associated with that suspected disability.

17) Complete the Eligibility Worksheets for each suspected disability.
    a. Click "Save and Continue" and if there are no errors on the page, users will be brought to the "Eligibility Determination" section.
    b. On this page, users are able to select the disability determinations and the eligibility determination. Error checks are in place to prompt if any data is missing based on the selections.

18) Click the "Save and Continue" button and if there are no errors on the page, users will be brought to the "Create Draft/Create Final Eligibility Determination and Worksheets" section.
    a. On this page, select the meeting dates, the meeting participants, and the information regarding procedural safeguards.

b. Click the "Excused" check box next to the participant's name to indicate that they are excused from the meeting.

19) At the bottom of the page is a button to create a draft document. Drafts can be created while there are still errors within the process; final documents cannot be created until all errors are corrected. Once the process is free of errors, the "Create Final" button will display, allowing the user to create a final document and recording the eligibility event associated with it.

20) Created documents can be viewed by clicking on the hyperlink for the document at the bottom of the Create Draft/Final page.

IEP PROCESS TAB

1) Hover over the EC Process tab in the menu bar and click on "IEP" from the dropdown menu.

2)

    a. As the user documents each section within the IEP, a green check or red "x" will display. A green check indicates the section is completed; whereas, a red "x" indicates information is missing or conflicting data has been entered.

    b. The "Show Section" button located at the bottom of the screen displays the selected section in PDF format. The "Save" button will save the information entered and continue to display the current section.

    c. The "Save & Continue" button will save the information entered in the section and continue to the next section.

IEP Process

Meeting Purpose Section

In this section, the user selects the meeting purpose and adds the IEP dates. To begin the process, click on the "Meeting Purpose" section.

1) Complete the fields on the page and click the "Save & Continue" button. Note: If the Case Manager is incorrectly listed, it can be added or changed within the Team tab on the Student Information menu.

IEP Process

Student Profile Section

In this section, add information collected from the student and/or parents.

1) The student's area(s) of eligibility will appear at the top of the page. This is populated after the finalization of an Eligibility Determination.

2) Complete the narratives using the information from the student and/or parents in the required fields. This information is mandatory, so users will receive an error message if no data is entered on the page. The practice of using place holders such as "The parent wishes…" is discouraged.

Student Profile

Student's overall strengths that contribute to success in the educational environment:

Parental concerns, if any, about their child's academic and functional performance in school:

Parent /student's vision for the future (Include, specifically, vision for after high school, if appropriate.):

BACK   SHOW SECTION   SAVE   SAVE & CONTINUE >>

Student Profile

The following errors have been found on this page:
You must list the student's overall strengths that contribute to success in the educational environment.
You must list parental concerns about the child's academic and functional performance in school.
You must include the parent/student's vision for the future.

3) Once the information has been entered, click "Save and Continue" to move to the next section. To move forward to another section without completing all required fields, navigate back to the IEP process tab and click on the next section in the process. Users can return to sections later to add in the remaining information.

IEP Process

Assessment Summary Section

In this section, add assessments or view the assessments that were previously entered for the student within the Referral and/or Eligibility processes.

Assessment Summary

David Test - 100027 | 08/18/2012
Import Holding School | Import

Please review and update the below existing data. Please note that state tests are not included in this section.

Del	Pos	New Pos	Date	Assessment Area	Assessment	Subject Area	Scores Reported	Actions
☐	1		11/01/2018	Adaptive Beha ∨	Adaptive Behavior - Adaptive Behavior Assessment System (ABAS-II) Teacher Form	General Adaptive Composite (GAC)	Std Score	DETAILS LOG
☐	2		10/19/2018	Adaptive Beha ∨	Adaptive Behavior- Eating and Drinking Ability Classification System	Broad Math	Std Score	DETAILS LOG
☐	3		11/02/2018	Educational Ev ∨	Educational - Woodcock-Johnson Tests of Achievement (WJ IV ACH)	Writing	Std Score	DETAILS LOG
☐	4		11/07/2018	Motor Evaluati ∨	Motor - Physical Therapy Observation	Visual Motor	# Errors	DETAILS LOG
☐	5		09/27/2018	Psychological ∨	Psychological-Cognitive Measure-Mullen Scales of Early Learning	Expressive Language	Age Equiv	DETAILS LOG

1) Previously entered assessments will display on the page. To view information regarding scores, narratives, and logs, click the "Details".

2) To document additional information, choose either "Add Assessments" or "Add Multiple Assessments" to document additional information.

3) Select the Assessment Area and Assessment from the dropdown list. The Subject Area and Scores Reported will populate after selecting the Assessment.

4) If the assessment needed is not listed, use the "Custom Assessments" tab. This tab allows users to document assessments that are not currently within the ECATS database.

5) After adding assessment information, click "Save and Continue". This leads to the Assessment Summary page where the date, details, and log scores can be added.
6) For custom assessments, select the Assessment Area from the dropdown list.

7) Alternately, click "Add Multiple Assessments." Select the Assessment Category of Special Education, which will display the full alphabetized list of all the assessments within ECATS.
8) Select assessments to add.

9) Click "Add Areas and Scores" to continue.
10) Document the relevant information, using the expand/collapse buttons to navigate down the page. Once completed, click "Save and Continue".

IEP Process
Source of Relevant Information Section
In this section, add areas assessed and associate them with previously entered assessment data.
Note: data entered in this section will populate throughout other sections in the IEP process.

1) First, add the areas assessed by clicking "Add/Remove Additional Areas".

Source Of Relevant Info	Brittany Test
Relevant Data	ADD/REMOVE ADDITIONAL AREAS

BACK   SHOW SECTION   SAVE   SAVE & CONTINUE >>

2) Check the relevant areas, and click "Save and Continue".

Area(s) Assessed   Brittany Test

Add/Remove Area(s) Assessed

☑ Adapted Physical Education   ☐ Nursing Services   ☐ Pre-Academic
☐ Audiology   ☐ Occupational Skills   ☐ Reading
☐ Behavior   ☐ Occupational Therapy   ☐ Social-Emotional
☐ Counseling Services   ☐ Organizational/Study   ☐ Speech/Language
☐ Daily Living   ☐ Orientation & Mobility   ☐ Visually Impaired
☐ Hearing Impaired   ☐ Physical Therapy   ☐ Writing
☐ Math

BACK   SAVE & CONTINUE >>

3) Using the expand/collapse buttons, associate data with each of the identified areas.

Source Of Relevant Info   Brittany Test

Relevant Data   ADD/REMOVE ADDITIONAL AREAS

⊞ Adapted Physical Education   ADD/REMOVE EXISTING DATA

BACK   SHOW SECTION   SAVE   SAVE & CONTINUE >>

Add Assessment   Brittany Test

⊞ Add Assessment(s)

⊞ Add Attendance

⊞ Add Grades

⊞ Add Progress Track Data

BACK   SAVE & CONTINUE >>

IEP Process
Present Levels Section
Within this section, specify the present levels of academic and functional performance for each of the previously identified areas assessed.
1) Enter information regarding the present levels for each area, then complete the Additional Information table.

2) Once complete click the "Save & Continue" button to continue to the next section.

IEP Process
Special Factors Section
On this page, decide whether any special factors should be considered in the development of the IEP.
1) Answer the questions and add additional information if necessary.

2) If the student has a documented hearing loss, a Communication Plan Worksheet must be created. Click the "Communication Plan Worksheet" to create the document.

3) At the bottom of the page, specify if the areas assessed are in need of specially designed instruction.

IEP Process
Secondary Transition Section
In this section, add transition information for students age 14 and older during the life of the IEP. If the student will not be 14 or older during the life of the IEP, click on the link and scroll down the page to the "Save & Continue" button.

1) A warning box will display at the top of the page with a reminder of the student age to determine whether a transition plan is necessary.

2) If a transition plan is required, complete the necessary information and continue to the bottom of the page.

Secondary Transition

The following people gave information about the student's needs, preferences, interests, and course of study selection:

☐ Student   ☐ School Staff

☐ Parent(s), Guardian(s) and Family Member(s)   ☐ Other

☐ Adult Service Agency Representatives

Courses of Study (beginning at age 14, or 8th grade, and updated annually):

○ F - Future Ready Core Course of Study: Leading to a NC Diploma

○ O - Future Ready Occupational Course of Study: Leading to a NC Diploma

○ E - Extended Content Standards: Leading to Graduation Certificate

Postsecondary Goals and Supports

ⓘ Complete beginning at age 16 (or earlier, as appropriate) and updated annually.

ⓘ Postsecondary goals are based upon age appropriate transition assessments as described in the present level of acadmic and functional performance. Indicate any activities and/or supports needed to assist student in making progress towards postsecondary goals (after high school) during the span of this IEP and the person (people) responsible for assuring these activities and/or supports are achieved.

ⓘ For each Postsecondary Goal and Support, specify what the student will do upon graduation from high school.

Education/Training:

Employment:

Independent Living (if appropriate):

☐ N/A

Adult Living Skills   Employment   Functional Vocational Evaluation (if appropriate)   Instruction   Related Services   Community Experiences   Daily Living Skills (if appropriate)

Transition Area: Adult Living Skills   ADD ADULT LIVING SKILLS SERVICES

3) Within each Transition Area, add transition services activities.

4) Click "Save and Continue" to save the data and move back to the Transition Areas. Complete each tab as necessary before clicking "Save and Continue" at the bottom of the page.

IEP Process

Annual Goals Section

This section allows users to build upon previously entered areas of need and present levels of academic and functional performance information.

1) Click on "Add/Delete Goals" to add the details and objectives (*if applicable*) for each goal.

2) Click "Add Goals" to add and edit annual goals (criteria of mastery will be added later.)

3) Then click "Goal Details/Objectives".

4) Select the goal details and complete the required information in the first portion of the screen, including mastery criteria, assistive technology and relationship to transition goals. Objectives may be added, if needed or desired. If the student is receiving instruction using the Extended Content Standards, objectives are required.
   a. When included, two objectives must be added per goal.
   b. If the student will require the goal for ESY, check the box so that it will be included within the ESY Services Goal Integration section later in the process.

IEP Process
Services Section
In this section, add special education and related service information.
1) Click "Add Special Ed Services".

2) Choose the Special Ed service(s) from the dropdowns. To add more than four services, click "Save and Continue" and then click "Add Special Ed Services" again to return to the page.

3) Complete the information regarding the frequency and location of services.

4) If applicable, add Related Services. Click "Add Related Services".

5) Choose the Related Service(s) from the dropdown menu. To add more than four services, click "Save and Continue" and then click "Add Related Services" again to return to the page.

6) Complete the information regarding the amount of service time, frequency, duration and location.

7) Address any transportation needs of the student.

IEP Process
Services Goal Integration Section
In this section, edit goal integration with services and add supplemental aids.

1) Review all the present level, goal, and services information previously entered in the process displays on this page.

2) Click "Edit Goal integration" to add services supporting the goal.

goal number 2

Service(s) supporting this goal: ☐ Math ☐ Occupational Therapy

BACK   SAVE & CONTINUE >>

3) Check the corresponding service and then click "Save and Continue" to return to the Service Goal Integration page.
4) Click "Add Supplemental Aids and/or Services", and add information.

Supplemental Aids and/or Services

Math:

BACK   SAVE & CONTINUE >>

IEP Process

Accommodations Section

In this section, add classes, district assessments and state tests in which the student is participating, along with any accommodations. You can also remove accommodations as needed. The process of adding classes, district assessments, and state tests is the same. The following is an example of class accommodations.

1) Click "Add Class Activities" to display a list of classes.

2) Check the box(es) next to the desired classes/activities, and then select the participation level at the bottom of the page. Click "Save and Continue" to progress to the accommodations page.

3) On the Accommodation page, select from the list of allowable accommodations for each class/activity. If multiple classes are selected, the accommodations added to one class will automatically select for all classes, as allowable.

      a. In the example below, Multiple Testing Sessions was selected for Health.

      b. Multiple Testing Sessions was automatically checked for Music.

      c. If we unchecked Multiple Testing Sessions for Health, then Multiple Testing Sessions would be automatically unchecked for Music.

      d. If Multiple Testing Sessions is appropriate for Health, but not Music, leave it checked for both, click "Save & Continue", and proceed to step 4.

4) Once the classes/tests and accommodations have been added, update the location dropdown. (This is applicable for classroom activities only.) To add or remove any accommodations for an individual class/test, click the "Edit" button.

Classroom Activities

ADD CLASS ACTIVITY

Activities	Participation Level	Location	Implementation	
Art - All	Participating with Accommodations	⇕		EDIT
Economics - HS	Participating with Accommodations	⇕		EDIT
English Language Arts - Elementary	Participating in Regular Class/Activity	General Ed ⇕		EDIT

Accommodations

Health - Middle/HS

- ☐ Assistive Technology Devices (Specify)
- ☐ Braille Writer/Slate and Stylus (Braille Paper)
- ☐ Interpreter/Translator Signs/Cues Test
- ☑ Multiple Testing Sessions - More Frequent Breaks (Every __ Min.)
- ☐ One Test Item Per Page Edition (not for online assessments)
- ☐ Student Marks Answers in Test Book (not for online assessments)
- ☐ Testing in a Separate Room - Small Group

- ☐ Braille Edition (EBA)
- ☐ Cranmer Abacus
- ☐ Large Print Edition (not for online assessments)
- ☐ Multiple Testing Sessions - Other
- ☐ Scheduled Extended Time - Approximately __ minutes
- ☐ Test Read Aloud (in English) (Requires specifics)
- ☐ Student Reads Test Aloud to Self

- ☐ Braille Edition (UEB)
- ☐ Dictation to a Scribe
- ☐ Magnification Devices
- ☐ Multiple Testing Sessions - Over Multiple Days (Number of Days __)
- ☐ Scheduled Extended Time - Other
- ☐ Testing in a Separate Room - One-on-One
- ☐ Word-to-Word Bilingual (English/Native Language) Dictionary/Electronic Translator (LEP only)

Music - All

- ☐ Assistive Technology Devices (Specify)
- ☐ Braille Writer/Slate and Stylus (Braille Paper)
- ☐ Interpreter/Translator Signs/Cues Test
- ☑ Multiple Testing Sessions - More Frequent Breaks (Every __ Min.)
- ☐ One Test Item Per Page Edition (not for online assessments)
- ☐ Student Marks Answers in Test Book (not for online assessments)
- ☐ Testing in a Separate Room - Small Group

- ☐ Braille Edition (EBA)
- ☐ Cranmer Abacus
- ☐ Large Print Edition (not for online assessments)
- ☐ Multiple Testing Sessions - Other
- ☐ Scheduled Extended Time - Approximately __ minutes
- ☐ Test Read Aloud (in English) (Requires specifics)
- ☐ Student Reads Test Aloud to Self

- ☐ Braille Edition (UEB)
- ☐ Dictation to a Scribe
- ☐ Magnification Devices
- ☐ Multiple Testing Sessions - Over Multiple Days (Number of Days __)
- ☐ Scheduled Extended Time - Other
- ☐ Testing in a Separate Room - One-on-One
- ☐ Word-to-Word Bilingual (English/Native Language) Dictionary/Electronic Translator (LEP only)

5) Uncheck the accommodation you wish to remove, check any accommodation you wish to add, and click "Save & Continue".
   a. In this example for Music, we unchecked Multiple Testing Sessions and checked "Other".

6) At the bottom of the page, click "Add Implementation Specifics" to add a narrative for all accommodations across classes and tests.

7) The text box located at the bottom of the screen provides an explanation regarding alternate assessments. If this is not applicable for the student, check the "Not applicable at this time" check box to disable the text box.

IEP Process
ESY Services Section
In this section, address ESY eligibility and services.

1) When a decision about ESY is made, the worksheet must be included in the IEP. Select the check box in order to print this document.
8) Determine if the student requires ESY by answering the questions with either Yes, No or Cannot be determined at this time.

9) If yes, complete the ESY Eligibility and Services sections. If no, click "Save and Continue".

IEP Process
ESY Services Goal Integration Section
If the student is eligible for ESY and requires services to support an annual goal, add it here. If not, click "Save and Continue" to move to the next step of the process.

1) Any goals previously flagged as ESY within the "Annual Goals" section will appear here.

2) In the same way as the Service Goal Integration section, ESY goal integration and supplemental aids can be added here.

IEP Process
Create Draft/Final IEP Document Section
On this page, complete the team member information, check for errors and create draft and final documents.

1) Complete the IEP Dates and Team Member tables. To edit the team members, return to the Team page within the Student Information dropdown.

Create IEP

NOTICE: The student is approaching the end of their high school career. If they are to exit during the life of this IEP, do not forget to complete a Summary of Performance document.

The following information is required before you can create this Final Document.

IEP Dates

Date IEP Sent:

Team Members in Attendance

If you mark any of the required members below as excused, be sure a request to excuse has been completed prior to the meeting and that the parent has approved the excusal.

LEA Representative:
☐ Excused

Special Education Teacher:
☐ Excused

Regular Education Teacher:
☐ Excused

Interpreter of Instructional Implications of Evaluation Results:
☐ Excused

Participating Parents: ☐ Mrs & Mrs Test

Other Team Members:
☐ Michael Johnson ☐ Erik Ogburn
☐ Kelley Blas ☐ Quentin Parker
☐ Khalilah OFarrow ☐ SueAnn Stalnaker

Explanation of team participants/absence of participants (if needed):

2) Click "Display IEP Errors" to view any missing or incomplete information within the IEP; or click "Create Draft Document" to view a PDF file of the IEP.

Click on 'Display IEP Errors' to check the entire IEP for errors. These errors must be corrected before a Final IEP can be created.

DISPLAY IEP ERRORS

CREATE DRAFT DOCUMENT

BACK   **SAVE**   **SAVE & CONTINUE >>**

No IEP Document Documents have been generated for this student.

3) After all errors have been addressed/corrected, users will be able to finalize the IEP.

PRIOR WRITTEN NOTICE SECTION

1) Hover over the EC Process tab in the menu bar and click on "Prior Written Notice" from the menu. This will take users to the document creation page for the Prior Written Notice.

2) Fill in the necessary data regarding the meeting details, the meeting purpose, and the explanations of actions proposed/refused.

Prior Written Notice

Prior Written Notice — Jordan Test

Prior Written Notice

To which parent/guardian/student is this letter addressed? [▼]

Date Sent: [   ] 📅

IEP Meeting Date (Date of Notice): [   ] 📅

Meeting Time: [▼] [▼] [▼]

Purpose

Purpose:
- ☐ Develop Initial Individualized Education Program/Individual Service Plan
- ☐ Annual Review
- ☐ Reevaluation
- ☐ Reevaluation/Annual Review
- ☐ Addendum
- ☐ Other

Explanation of Actions Proposed

Description of action(s) proposed: [   ]

Explanation of why the agency proposed to take the action: [   ]

Explanation of Actions Refused

Description of action(s) refused: [   ]

Explanation of why the agency refused to take the action: [   ]

5) When users reach the "Source of Relevant Information" table, click the "Add Remove Existing Data" button.

Source of Relevant Information   ADD/REMOVE EXISTING DATA

6) This page is made up of a series of expand/collapse tables that allow users to add and remove data applicable to the Prior Written Notice. To expand a table, click on the "+" sign. Click the checkbox for any item to add. Once finished with adding data to each table, click the "Save and Continue" button to navigate back to the Prior Written Notice creation page.

Add Existing Data	David Test - 100027 | 08/18/2012
	Import Holding School | Import

⊞ Add Assessment(s)

⊞ Add Attendance

⊞ Add Grades

⊞ Add Progress Track Data

BACK   SAVE & CONTINUE >>

Add Assessment	Jordan Test

⊟ Add Assessment(s)

Add	Assessment(s)	Date
☐	Adaptive Behavior - Adaptive Behavior Assessment System -2nd Edition (ABAS-II) - Parent Form	11/29/2017
☐	Adaptive Behavior - Adaptive Behavior Assessment System -2nd Edition (ABAS-II) - Parent Form	01/03/2018
☐	Adaptive Behavior - Adaptive Behavior Assessment System -2nd Edition (ABAS-II) - Parent Form	01/10/2018
☐	Adaptive Behavior - Adaptive Behavior Assessment System -2nd Edition (ABAS-II) - Parent Form	01/04/2018
☐	Adaptive Behavior - Adaptive Behavior Assessment System -2nd Edition (ABAS-II) - Parent Form	01/04/2018

⊞ Add Attendance

⊞ Add Grades

7) The data added will populate in the "Source of Relevant Information" table. To delete any data, click the "Add/Remove Existing Data" button again, uncheck the boxes, and click "Save and Continue" and the data will be removed from the "Source of Relevant Information" table.

8) Complete the "Additional Information" and "Team Members in Attendance" tables.

9) At the bottom of the page are buttons to save, create a draft or create a final document. Drafts can be created while there are still errors within the process; final documents cannot be created until all errors are corrected. Any errors found in this table will display in a red box at the top of the page.

10) Created documents can be viewed by clicking on the hyperlink for the document at the bottom of the "Create Draft/Create Final" page.

CONSENT TAB – CONSENT FOR SERVICES

1) Hover over the EC Process tab in the menu bar and click on "Consent" from the menu. On the Consent page, scroll to the section "Create Consent for Services."

1) Next, on the Consent page click on the section for "Create Consent for Services."

2) Fill in the fields on the document creation page.

3) At the bottom of the page, click the "Create Draft Document" button.

4) Any errors found on the document creation page will display in a red box at the top of the Download Consent for Services page. (Users may still view the draft document without correcting these errors, but users will not be able to finalize the document.) Click on the "Back" button at the bottom of the page to navigate back to the document creation page to make changes. Click on the "Continue" button to navigate back to the main Consent page. Click on the "view" hyperlink at the bottom to view the draft PDF document in a new browser tab.

5) Once all errors are corrected and the user is ready to finalize the document, click on the "Create Final Document" button at the bottom of the document creation page.

6) After a final Consent to Evaluate has been created, Eligibility has been determined and once the parent has returned the document, return to the Consent process. Enter the required consent information and click "Submit Consent for Services Response".

Consent for Services

CREATE CONSENT FOR SERVICES

ℹ️ Use the link directly above to create a final parent/guardian/student consent for services document. Then submit the response information in the fields directly below.

Parent/Guardian/Student Consent for Services Response: `Parent/Guardian/Student Signed - Yes` ⌄

Parent/Guardian/Student Consent for Services Date Signed: [   ] 📅

SUBMIT CONSENT FOR SERVICES RESPONSE

7) The link to the created document can be accessed from the bottom of the Consent for Services document creation page or from the Documents tab. The event data can be found on the Student History page.

SAVE DATA AND RETURN TO CONSENT PAGE

Consent for Services - DEC 6 Documents

Document ID	Date Created	Created By	Document	Status
85	01/19/2018	Cory Wall	Consent for Services - DEC 6	(Draft)

PSSP PROCESS TAB

1) Hover over the EC Process tab in the menu bar and click on "PSSP" from the dropdown menu.

a. As the user documents each section within the IEP, a green check or red "x" will display. A green check indicates the section is completed; whereas, a red "x" indicates information is missing or conflicting data has been entered.

b. The "Show Section" button located at the bottom of the screen displays the selected section in PDF format. The "Save" button will save the information entered and continue to display the current section.

c. The "Save & Continue" button will save the information entered in the section and continue to the next section.

2) Copy data from the IEP process into the PSSP process by clicking the button "Copy from IEP".

PSSP Process

Meeting Purpose Section

In this section, the user selects the meeting purpose and adds the IEP dates. To begin the process, click on the "Meeting Purpose" section.

1) Complete the fields on the page and click the "Save & Continue" button. Note: If the Case Manager is incorrectly listed, it can be added or changed within the Team tab on the Student Information menu.

PSSP Process
Student Profile Section
In this section, add information regarding the student and parents.

1) The student's area(s) of eligibility will appear at the top of the page. This is populated after the finalization of an Eligibility Determination.

2) Complete the narratives using the information from the student and/or parents in the required fields. This information is mandatory, so users will receive an error message if no data is entered on the page. The practice of using place holders such as "The parent wishes…" is discouraged.

Student Profile

Student's overall strengths that contribute to success in the
educational environment:

Parental concerns, if any, about their child's academic and functional
performance in school:

Parent /student's vision for the future (Include, specifically, vision for
after high school, if appropriate.):

3) If the information has been entered, click "Save and Continue" to move to the next
section. To move forward to another section without completing all required fields,
navigate back to the IEP process tab and click on the next section in the process. Users
can return to sections later to add in the remaining information.

BACK   SHOW SECTION   SAVE   SAVE & CONTINUE >>

PSSP Process

Assessment Summary Section

In this section, add assessments or view the assessments that were previously entered for the
student within the Referral and/or Eligibility processes.

Assessment Summary   Brittany Test

Del	Pos	New Pos	Date	Assessment Area	Assessment	Subject Area	Scores Reported	Actions
☐	1		01/15/2018	Braille Skills Ir ▼	The Rossetti Infant-Toddler Language Scale	Language	Age Equiv	DETAILS / LOG
☐	2		01/09/2018	Motor Evaluat ▼	Peabody Picture Vocabulary Test - R			DETAILS / LOG
☐	3		01/02/2018	Motor Evaluat ▼	The Rossetti Infant-Toddler Language Scale	Social Studies	Age Equiv	DETAILS / LOG
☐	4		01/02/2013	Motor Screeni ▼	Preschool Language Scale - 3			DETAILS / LOG
☐	5		01/15/2018	Medical Evalu ▼	Weiss Comprehensive Articulation Test	Broad Written Language	Percentile	DETAILS / LOG
☐	6		01/07/2018	Health Screen ▼	CELF - Preschool	Math Comprehension	Grade Equiv	DETAILS / LOG
							Age Equiv	DETAILS

1) Previously entered assessments will display on the page. To view information regarding
scores, narratives, and logs, click the "Details" button.

2) To document additional information, choose either "Add Assessments" or "Add Multiple Assessments" to document additional information.

3) Select the Assessment Area and Assessment from the dropdown list. The Subject Area and Scores Reported will populate after users have selected the Assessment.

4) If the assessment needed is not listed, use the "Custom Assessments" tab. This tab allows users to document assessments that are not currently within the ECATS database.

5) After adding assessment information, click "Save and Continue". This leads to the Assessment Summary page where the date, details, and log scores can be added.

6) For custom assessments, select the Assessment Area from the dropdown list.

7) Alternately, click "Add Multiple Assessments". Select the Assessment Category of Special Education, which will display the full alphabetized list of all the assessments within ECATS.

8) Check all assessments to add.

9) Click "Add Areas and Scores" to continue.

10) Fill in the relevant information, using the expand/collapse buttons to navigate down the page. Once completed, click "Save and Continue".

PSSP Process

Source of Relevant Information Section

In this section, add areas assessed and link them with previously entered assessment data in addition to attendance, grade, and progress track data within ECATS. Note: data entered in this section will populate throughout other sections in the PSSP process.

1) First, add the areas assessed by clicking "Add/Remove Additional Areas".

2) Check the relevant areas, and click "Save and Continue".

Area(s) Assessed

Brittany Test

Add/Remove Area(s) Assessed

- ☑ Adapted Physical Education
- ☐ Audiology
- ☐ Behavior
- ☐ Counseling Services
- ☐ Daily Living
- ☐ Hearing Impaired
- ☐ Math

- ☐ Nursing Services
- ☐ Occupational Skills
- ☐ Occupational Therapy
- ☐ Organizational/Study
- ☐ Orientation & Mobility
- ☐ Physical Therapy

- ☐ Pre-Academic
- ☐ Reading
- ☐ Social-Emotional
- ☐ Speech/Language
- ☐ Visually Impaired
- ☐ Writing

BACK   **SAVE & CONTINUE >>**

3) Using the expand/collapse buttons, associate data with each of the identified areas.

Source Of Relevant Info

Brittany Test

Relevant Data

ADD/REMOVE ADDITIONAL AREAS

⊞ Adapted Physical Education

ADD/REMOVE EXISTING DATA

BACK   **SHOW SECTION**   **SAVE**   **SAVE & CONTINUE >>**

Add Assessment

Brittany Test

⊞ Add Assessment(s)

⊞ Add Attendance

⊞ Add Grades

⊞ Add Progress Track Data

BACK   **SAVE & CONTINUE >>**

PSSP Process

Present Levels Section
Within this section, specify the present levels of performance for each of the previously
identified areas assessed.
1) Enter information regarding the present levels for each area, then complete the
Additional Information table.

2) Once complete click the "Save & Continue" button to continue to the next page in
the PSSP process.

PSSP Process
Special Factors Section
On this page, decide whether any special factors should be considered in the development of
the PSSP.
1) Answer the questions and add additional information if necessary.

2) If the student has documented hearing loss, a Communication Plan Worksheet must be created. Click "Communication Plan Worksheet" to create the document.

3) At the bottom of the page, specify if the areas assessed are in need of specially designed instruction.

PSSP Process
Annual Goals Section
This section allows users to build upon previously entered areas of need and present levels of academic and functional performance information.

1) Click "Add/Delete Goals" to add the details and objectives (*if applicable*) for each goal.

2) Click "Add Goals" to add and edit annual goals (criteria of mastery will be added later.)

3) Then click "Goal Details/Objectives".

4) Select the goal details and complete the required information in the first portion of the screen, including mastery criteria, assistive technology and relationship to transition goals. Objectives may be added, if needed or desired. If the student is receiving instruction using the Extended Content Standards, objectives are required.

        a. When included, two objectives must be added per goal.
        b. If the student will require the goal for ESY, check the box so that it will be included within the ESY Services Goal Integration section later in the process.

PSSP Process

Services Section

In this section, add special education and related service information.

    1) Click "Add Special Ed Services".

    2) Choose the Special Ed service(s) from the dropdowns. To add more than four services, click "Save and Continue" and then click "Add Special Ed Services" again to return to the page.

    3) Complete the information regarding the frequency and location of services.

4) If applicable, add Related Services. Click "Add Related Services".

5) Choose the Related Service(s) from the dropdown menu. To add more than four services, click "Save and Continue" and then click "Add Related Services" again to return to the page.

6) Complete the information regarding the amount of service time, frequency, duration and location.

7) Address any transportation needs of the student and how progress reports will be issued. When you have entered the information, click "Save & Continue".

PSSP Process

Services Goal Integration Section

In this section, edit goal integration with services and add supplemental aids.

1) All the present level, goal, and services information previously entered in the process is available on this page.

2) Click "Edit Goal integration" to add services supporting the goal.

goal number 2

Service(s) supporting this goal: ☐ Math ☐ Occupational Therapy

BACK **SAVE & CONTINUE >>**

3) Check the corresponding service and then click "Save and Continue" to return to the Service Goal Integration page.
4) Click "Add Supplemental Aids", and add information.

Supplemental Aids and/or Services

Math: [   ]

BACK **SAVE & CONTINUE >>**

PSSP Process
Create PSSP Section

On this page, complete the team member information, check for errors and create draft and final documents.

1) Fill in the PSSP Dates and Team Member tables. To edit the team members, return to the Team page within the Student Information dropdown.

Create PSSP   **Brittany Test**

ⓘ The following information is required before you can create this Final Document.

Team Members in Attendance

ⓘ If you mark any of the required members below as excused, be sure a request to excuse has been completed prior to the meeting and that the parent has approved the excusal.

LEA Representative: [▼]
☐ Excused

Special Education Teacher: [▼]
☐ Excused

Regular Education Teacher: [▼]
☐ Excused

Interpreter of Instructional Implications of Evaluation Results: [▼]
☐ Excused

Participating Parents: ☐ Mrs & Mrs Test

Other Team Members: ☐ Michael Johnson ☐ Erik Ogburn
☐ Kelley Blas ☐ Quentin Parker
☐ Khalilah OFarrow ☐ SueAnn Stalnaker

Explanation of team participants/absence of participants (if needed): [   ]

2) Click "Display Services Plan Errors" to view any missing or incomplete information within the PSSP; or click "Create Draft Document" to view a PDF file of the PSSP.

Click on 'Display Services Plan Errors' to check the entire Services Plan for errors. These errors must be corrected before a Final Services Plan can be created.

DISPLAY SERVICES PLAN ERRORS

CREATE DRAFT DOCUMENT

BACK   SAVE   SAVE & CONTINUE >>

No PSSP Document Documents have been generated for this student.
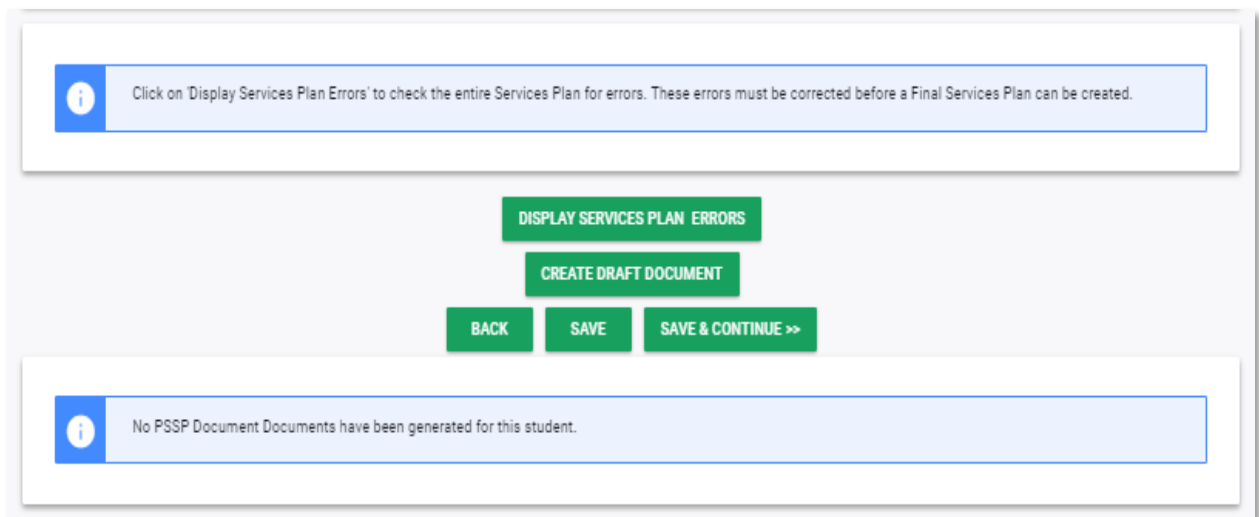
3) Once an error free draft document has been created, users will be able to create a final PSSP.

REEVALUATION PROCESS TAB

1) Hover over the EC Process tab in the menu bar and click on "Reevaluation".
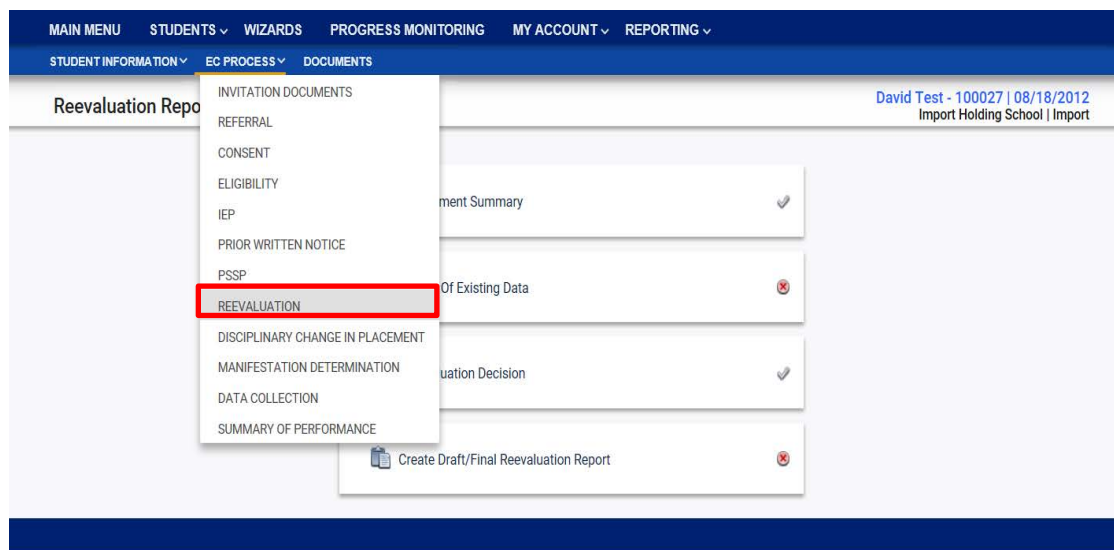
2) On the Reevaluation Report process page, users will see the links for each section in the process.

a. If there is no data entered in any of the sections, the compliance check marks will appear clear.
b. As data is entered and saved in each section, the check marks will change to green check marks (all error checks are met) or red X signs (there are errors within that section that need to be addressed before a final document can be created).

3) Click on the first section in the process, "Assessment Summary." Any assessments and evaluations entered for the student thus far will appear here. Click on the "Add Assessment(s)" button to add assessments to the table.

4) Select the assessment area and the assessment name from the dropdown. Based on the assessment selected, the subject area and the scores reported associated with that assessment will populate. Add comments in the comments text box provided.

5) If users do not see the assessment they are looking for in the assessment dropdown, a custom assessment may be added via the **Custom Assessments** tab. This table will allow users to manually type in the assessment information.

6) Click the "Save and Continue" button at the bottom of the page and users will be brought back to the "Assessment Summary" page.
    a. The assessments added will be added to the table, and users can type in the date, or select a date via the calendar icon for that assessment.

b. Delete the assessment by selecting the "Del" checkbox next to it and clicking the "Save" button at the bottom of the page.

7) Add multiple assessments by selecting the "Add Multiple Assessments" button.
   a. Select a category from the Assessment Category dropdown, and users will see the assessments associated with that category populate below.
   b. Select one or multiple and click the "Add Area(s) and Score(s)" button.

8) Fill in the information associated with the assessments selected on that page.

9) Once all the assessments are added, click the "Save and Continue" button at the bottom of the page.

a. If there are no errors on the page, users will be brought to the "Review of Existing Data" section.

b. This page is made up of a series of expand/collapse tables that allow adding and removing data applicable to the reevaluation process for the student.

c. Each tab on the table has expand/collapse tables pertaining to each type of data.

10) To expand a table, click on the plus sign. Users will see fields where data applicable to that area can be added.

a. If no data is available for an area, users can check the "No data is available for this area" checkbox. If selected, the text box is disabled.

b. Click on the "Add/Remove Existing Data" button to add data from other sources.

11) After clicking on the "Add/Remove Existing Data" button for a particular table, users will be brought to another page with expand/collapse tables where they can add Assessments, Attendance, Grades, and Progress Track data, if available.

a. Click on the plus/minus signs to expand and collapse each table.

b. Click the "Save and Continue" button to be brought back to the "Review of Existing Data" page.

12) Complete the remaining tabs –Summary, Observational Data, Additional Observational Data, and Additional Information

Summary

Observational Data

Additional Observational Data

Additional Information

13) Click the "Save and Continue" button. If there are no errors on the page, users will be brought to the "Reevaluation Decision" section. On this page, indicate the IEP team's decision.

14) If users select that the IEP team has determined that no additional formal evaluations are needed, a textbox will display for further explanation.

15) If users select that the IEP team has decided that formal evaluations are needed, two additional tables will display with Yes/No questions that must be answered regarding Eligibility and Programming: Development of the IEP.

16) Once users have completed the "Reevaluation Decision" page, click the "Save and Continue" button. If there are no errors on the page, users will either be brought to the "Create Draft/Final Reevaluation Report" section or the "Evaluation Plan" section.

17) The Evaluation Plan section will only display if formal evaluations are required. On this page, users can select the needed Screenings and Evaluations.

18) Once users have completed the data fields on "Evaluation Plan" page (if required), click the "Save and Continue" button.

       a. If there are no errors on the page, users will be brought to the "Create Draft/Final Reevaluation Report" section.

       b. On this page, select the meeting date and the meeting participants.

       c. Click the "Excused" check box next to the participant's name to indicate that they are excused from the meeting.

19) Address the Procedural Safeguards table by checking the box(es) as appropriate

20) At the bottom of the page is a button to create a draft document.
   a. Drafts can be created while there are still errors within the process; final documents cannot be created until all errors are corrected.
   b. Once the process is free of errors, the "Create Final" button will display, allowing the user to create a final document.
   c. Created documents can be viewed by clicking on the hyperlink for the document at the bottom of the Create Draft/Final Reevaluation Report page or on the Documents tab.

MANIFESTATION DETERMINATION TAB

1) Hover over the EC Process tab in the menu bar and click on "Manifestation Determination"

    a. On the Manifestation Determination process page, users will see the links for each section in the process.

    b. If there is no data entered in any of the sections, the compliance check marks will appear clear.

    c. As data is entered and saved in each section, the check marks will change to green check marks (all error checks are met) or red X signs (there are errors within that section that need to be addressed before a final document can be created.)
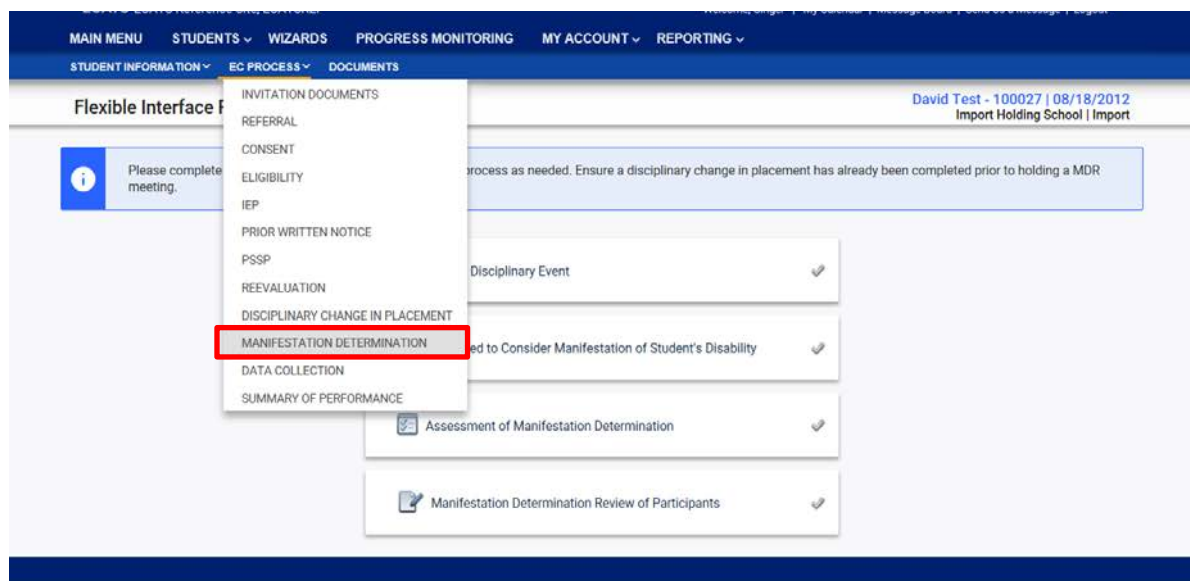
2) Click on the first section in the process, "Current Disciplinary Event." Fill in the necessary data regarding the event.

3) At the bottom of the page, click the "Save and Continue" button. Any errors found in this section will display in a red box at the top of the page.

4) If there are no errors on the page, users will be brought to the "Data Used to Consider Manifestation of Student's Disability" section. Check the checkbox for each Data Source used.

5) As users check the checkboxes, date fields will display allowing entry of the date of the data source. If other data sources are used to consider the manifestation of the student's disability but do not appear on the list, select the checkboxes for "Other" and a text box will display to type in the data source.

6) Fill in the information regarding the implementation of the IEP.

Implementation of the IEP

Describe how the academic and behavioral goals on the student's IEP are being implemented:

Describe how the accommodations, modifications, and supplementary services included in the student's IEP are being implemented:

☐ The student's IEP does not include accommodations, modifications and supplementary services.

Describe how the related services included in the student's IEP are being implemented:

☐ The student's IEP does not include related services.

7) Fill in the information regarding behavior. If more space is needed for revisions to the interventions or BIP, click the "Add Revisions" button at the top right of the Behavior table to add more entries. Up to 15 revisions may be added.

Behavior   ADD REVISIONS

Does the student have a Behavior Intervention Plan (BIP) based on a Functional Behavioral Assessment?

ⓘ Explain how and when the interventions and/or BIP were revised (if any were completed).

Date of Revisions: Explanation of Revisions:

Date of Revisions: Explanation of Revisions:

Did the behavior patterns change over time (e.g. increase in frequency, duration, and/or intensity)?

8) Click the "Save and Continue" button at the bottom of the page and if there are no errors, users will be brought to the "Assessment of Manifestation Determination" section. Answer the questions by selecting "Yes" or "No" in each dropdown.

Assessment of Manifestation Determination   Adrian Test - 100001 | 09/30/2003
                                                               Training School | TS

ⓘ Complete the assessment of manifestation questions and determination as requested below.

Essential Questions

Based on the above factors, was the conduct in question caused by the student's disability?

Based on the above factors, did the conduct in question have a direct or substantial relationship to the student's disability?

Was the conduct in question the direct result of the school district's failure to implement the IEP?

9) Based on the selections made in the dropdown, the final question on the page will automatically populate with "Yes" or "No."

Manifestation Determination

Is the violation of the student code of conduct a manifestation of the student's disability?   No

10) Click the "Save and Continue" button at the bottom of the page and if there are no errors, users will be brought to the "Manifestation Determination Review of Participants" section. Fill in the necessary information regarding the meeting date and the meeting participants. To add additional participants, click the "Add" button.

Manifestation Determination Review of Participants
Adrian Test - 100001 | 09/30/200;
Training School | T

ⓘ   Comlete the manifestation determination review of participants as requested below.

Manifestation Determination Meeting   ADD

Meeting Date: [   ] 📅

ⓘ   The following individuals will be present at the Manifestation Determination meeting:

Name: [   ]   Position: [   ] abc✓
Name: [   ]   Position: [   ] abc✓

11) At the bottom of the page are buttons to create a draft or final document. Drafts can be created while there are still errors within the process; final documents cannot be created until all errors are corrected.

CREATE DRAFT DOCUMENT
CREATE FINAL DOCUMENT

12) Created documents can be viewed by clicking on the hyperlink for the document at the bottom of the Manifestation Determination Review of Participants page (where users create the draft/final) or on the Documents tab.

BACK   SHOW SECTION   SAVE   SAVE & CONTINUE >>

Manifestation Determination Documents

Document ID	Date Created	Created By	Document	Status
181	04/25/2018	Liliana Gregory	Manifestation Determination	(Draft)

DISCIPLINARY CHANGE IN PLACEMENT TAB

1) Hover over the EC Process tab in the menu bar and click on "Disiciplinary Change in Placement". This will take users to the process page for the Disciplinary Change in Placement. Click on the first section in the process, "Disciplinary Change in Placement."
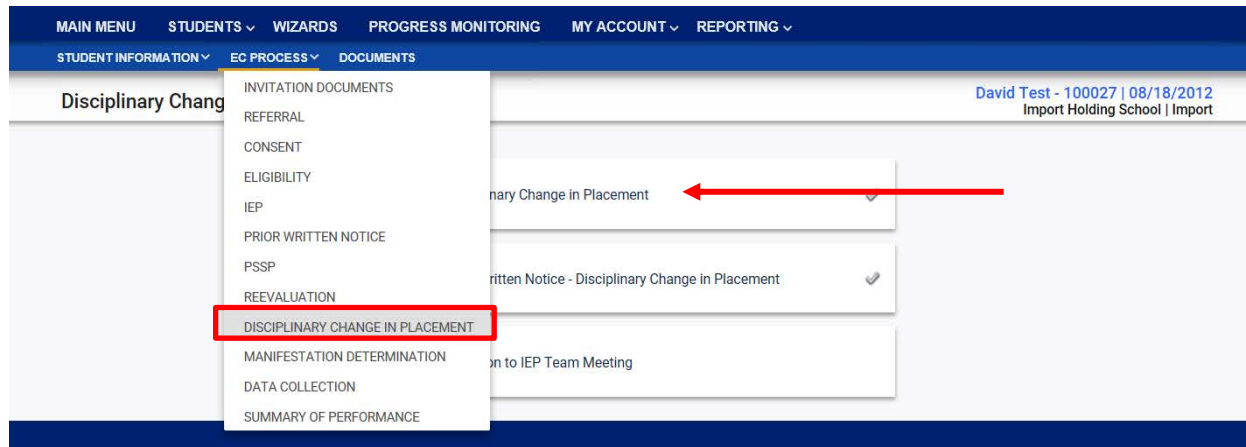
2) Fill in the Pertinent Information table. Click on the first section in the process, "Disiciplinary Change in Placement." Click on the dropdown to select the parent/guardian. Click the "Additional invitation…" dropdown, if necessary. Check the box if the child is being invited to the meeting, if appropriate. Click the calendar to select the "Date sent" and "Manifestation Determination DateFill in the necessary data regarding the Manifestation Determination meeting.

3) Add the individuals attending the Manifestation Determination Meeting by clicking the "Add Individuals" button. Fill in their name and position.

Individuals Attending Manifestation Determination Meeting

Name   Position

ADD INDIVIDUALS

4) At the bottom of the page, click the "Save and Continue" button. Any errors found in this section will display in a red box at the top of the page.

5) If there are no errors on the page, users will be brought to the "Prior Written Notice – Disciplinary Change in Placement" section. Enter the explanation of actions in the text boxes provided.

Prior Written Notice - Disciplinary Change in Placement   Jordan Test

Explanation of Actions

⚠ All items must be addressed.

School personnel determined disciplinary change in placement because:

Describe the reasons and length of the proposed removal:

BACK   SHOW SECTION   SAVE   SAVE & CONTINUE >>

6) At the bottom of the page, click the "Save and Continue" button. Any errors found in this section will display in a red box at the top of the page.

7) If there are no errors on the page, users will be brought to the "Invitation to IEP Team Meeting" section. Fill in the necessary information regarding the meeting purpose.

Meeting Purpose

The purpose of this meeting is to (Check all that may apply):

☐ Discuss the special education referral for an initial evaluation or reevaluation
☐ Discuss evaluation results to determine eligibility for special education and related services
☐ Discuss, develop, review and/or revise the individualized education program
☐ Discuss educational placement
☐ Discuss transition
☐ Other

8) Fill in the necessary information regarding meeting participants.

9) Fill in the necessary information regarding meeting details.

10) At the bottom of the page are buttons to create a draft or final document. Drafts can be created while there are still errors within the process; final documents cannot be created until all errors are corrected.

11) Created documents can be viewed by clicking on the hyperlink for the document at the bottom of the Invitation to IEP Team Meeting page (where users created the draft/final) or on the Documents tab.

SUMMARY OF PERFORMANCE TAB

1) Hover over the EC Process and select "Summary of Performance". Personal Information is imported from PowerSchool. If any of this information is incorrect, please make the changes in PowerSchool to be imported into ECATS. You will need to enter the "Graduation Date" for the student by clicking the calendar icon.

2) Complete the Student Input section and then move to the Transition Assessments sections.

3) For Formal Assessments, click "Add/Remove Existing Data" located at the top right of the section. To add existing data, click the plus sign to expand the assessment area and select the assessments you would like to add. After choosing all options you need, click "Save & Continue". This will return you to the Summary of Performance screen. Text can be entered into the Additional Information textbox, if needed. Repeat these steps for the Informal Assessments section.

Transition Assessments

Formal Assessments　　　　　　　　　　　　　　　　　　　　　→　　ADD/REMOVE EXISTING DATA

ℹ️ Include information from academic/psychological/adaptive behavior/vocational assessments

Additional Information: _____

Informal Assessments　　　　　　　　　　　　　　　　　　　　　→　　ADD/REMOVE EXISTING DATA

ℹ️ Include information from dream sheets, parent/teacher/student interviews, ecological observations, task analysis, etc.

Additional Information: _____

4) The Post-School Goals section will populate from the current IEP.

Post-School Goals

Employment Goal:
Education Goal:
Independent Living Goal (if applicable):

5) Complete the Summary of Education Performance section by adding text in the boxes provided. Accommodations/Modifications will populate from the current IEP.

Summary of Educational Performance

ℹ️ Include the student's present level of academic achievement and functional performance, accommodations, and modifications required to be successful in school.

Academic Performance: _____

Functional Performance: _____

Accommodations/Modifications:

6) Complete the Assistive Technology section. Check the box "Assistive Technology is not required", if not needed by the student.

7) Complete the Recommendations section by entering text or checking the "No recommendations in this area" statement for each area. The Other textbox is available, if needed.

8) Once you have addressed each section, click "Save" to save the information and remain on the screen or click "Create Draft Document" to save and view the document. You will be unable to create a final document until all the necessary information has been entered.
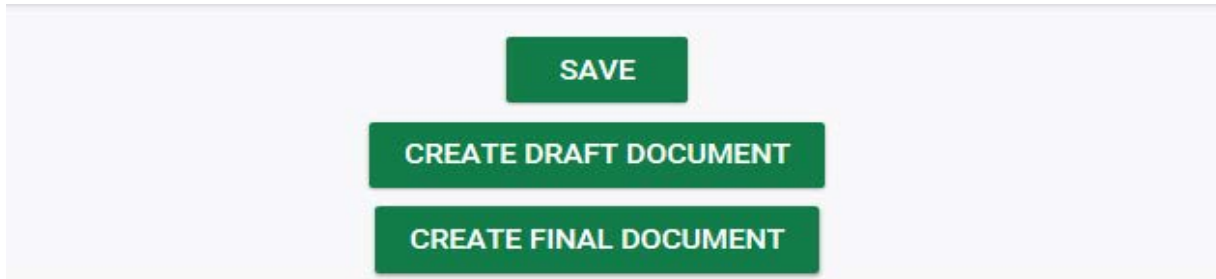
9) You will be able to view the document by clicking on the link at the bottom of the screen.

Summary of Performance Documents

Document ID	Date Created	Created By	Document	Status
224	04/16/2019	Teacher Test	Summary of Performance	(Draft)

DOCUMENTS TAB

1) The Documents page allows creation of various types of documents. Select the type of document to create by clicking on the radio button next to the document/letter name. A Draft document with no system errors must be completed before Final document can be created. All Drafts will print with a 'Proposed' watermark on each page. Drafts are saved in ECATS for 30 days (unless configured differently by the district) and Final Documents remain in the system permanently.

Documents:

General	○ 1st Semester Kindergarten Initial Identification	○ Notice of Suspension 1716
Section 504	○ Accommodation Review	○ Progress Report
MTSS	○ Appeal Hearing Report	○ NCECATS-EducationPlan
English Learner	○ Contact Log	○ CSP Document
	○ NCECATS EL Continued Refusal Letter	○ Summary of Performance

2) All Draft and Final documents created for the student are listed at the bottom of the screen in the Documents Created table. Draft documents will have '(Draft)' in the Status column while Final documents will have a check box in this column. To view these documents, click on the blue hyperlink.

Documents created for Jordan Test

Del	Doc ID	Date Generated ?	Generated By	Document ?		Batch	Status
☐	907	02/26/2018	Jess Benge	Disciplinary Change in Placement	PDF	☐	(Draft)
☐	874	02/15/2018	Jess Benge	Manifestation Determination	PDF	☐	(Draft)
☐	831	02/01/2018	Jess Benge	Prior Written Notice	PDF	☐	(Draft)
E	745	01/25/2018	Jess Benge	PSSP	PDF	☐	**Final**
E	734	01/25/2018	Grzegorz Galinski	NC Plan of Care	PDF	☐	**Final**

3) To Create a Document/Letter:
   a. Click on the radio button next to the document/letter to create.
   b. Click on either the 'Create Draft' or 'Create Final Document' button.
   c. Complete all custom data information – custom data will vary depending on the document or letter being created.
   d. At the bottom of the screen, click on either the 'Create Draft Document' or 'Create Final Document' button.

4) Tips for this page:
   a. Only click the 'Create Draft/Final Document' button once. The system will begin to compile the entered data for document generation once the button is clicked. This data compilation process may take several seconds depending on the amount of information being processed.

5) To View a Created Document/Letter:
   a. Click on the blue hyperlink title of the document.
   b. Adobe Acrobat Reader will automatically launch.
   c. The document is viewable in a non-editable format.
   d. The browser toolbar, the ECATS menu bar and the Adobe menu bar will all appear. To return to ECATS, simply click on any of the ECATS menu buttons at the top of the screen. DO NOT close the browser.

6) To print the document, choose the Print icon in the Adobe toolbar.
   a. If there are errors in the document, they will display in a list. Click the "View Errors in a Separate Window" button to open a pop-up window with the errors listed, and click the "Back to Document Creation Page" link to navigate back to the data entry page to fix the errors.
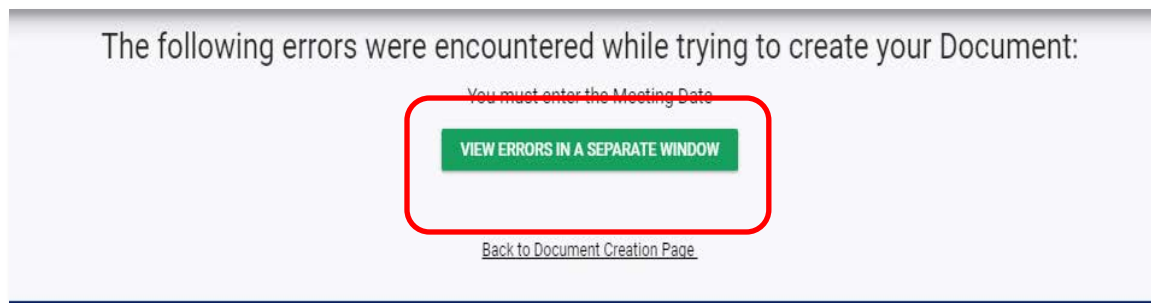
7) To upload an external document to a student's record:
   a. From the blue navigation bar at the top of the student's page, select "Documents".
   b. Scroll down to the bottom of the document list and click on "Upload External Document(s)".
   c. Click "Browse", choose the document(s) you would like to upload and click "Open".
   d. Enter a name for the document, if you want to use something other than the file name.
   e. Once your file has been selected click "Upload File(s)".

8) To attach a document (e.g. signature page) to a document created within ECATS, follow the steps above—except select "Upload External Attachments" and be sure to select the specific finalized ECATS document you want this external page to attach within the system for this student.

CREATING AN ACCOMMODATION REVIEW - INDIVIDUAL STUDENT

To create an Accommodation Review for an individual student, follow the steps below:

1. Enter the Student's Record and select the Documents tab.

2. Select the radio button (circle) beside Accommodation Review and click 'Create Draft'.

3. Select 'IEP' from the dropdown for area to review. The state tests with accommodations from the student's finalized IEP will be displayed.

4. To create the Accommodation Review, select the test(s) and click 'Create Draft Document'.

5. Click 'view' to view the document. The draft document will have the word Proposed as a watermark.

6. Click the printer icon or right click and click 'Print'.

7. If you would like to create a final document, return to the Documents tab.

8. Select the radio button (circle) beside Accommodation Review and click 'Create Final Document'.

9. Select the Area to review and test(s), if not already checked and click 'Create Final Document'.

10. Click 'view' to view the finalized document.

11. Click the printer icon or right click and click 'Print'.

MANAGING YOUR CASELOAD

Please note the ability to setup your caseload is dependent upon your user type.

Using the Caseload Setup Wizard
1) In the "Wizards" tab, select Caseload Setup Wizard link.
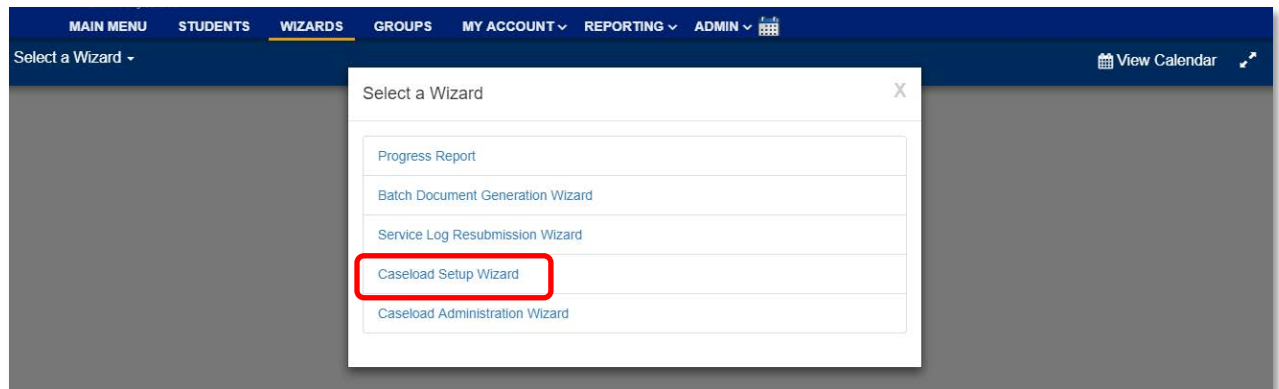
2) After selecting the Caseload Setup Wizard, click on the 'Add More Students to Caseload' button.
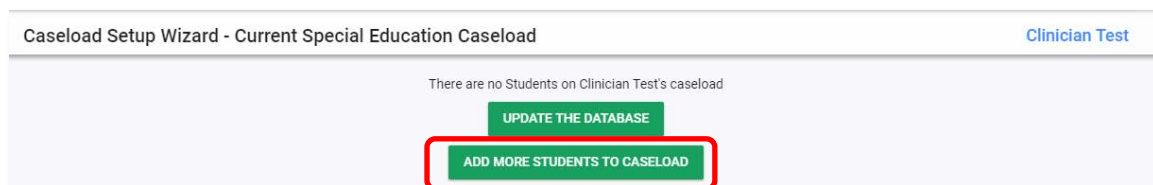
3) Search for the student(s) you would like to add to your caseload. Keep the search as broad as possible, usually by school.
4) Click on the 'View Students' button.

5) Check the *Case Manager* or *Team Member* checkbox next to the student(s) you would like to add to your caseload.
6) The type of service you provide will automatically be selected on the right side of the screen (i.e. Speech, OT, etc).
7) After clicking 'Add Students to Caseload,' the students will be added to your caseload, along with the type of service that you provide.

Removing a Student from Your Caseload:
1) Uncheck the *IEP Team* or *Case Manager* checkbox next to the student(s) you would like to remove from your caseload.
2) Click the 'Update the Database' button – this will remove all of the students you selected.

Viewing Your Caseload:
1) On the "Main Menu" tab, click the "Students" tab.
2) Click on the 'View My Caseload' button.
3) A list of your students will appear.

ACCOMMODATION REVIEW DOCUMENT WIZARD

The "Wizards" tab on the Main Menu allows you to create Accommodation Review Documents for students who are on your caseload and have a finalized IEP.

Using the Accommodation Review Document Wizard
1. Go to Wizards and select Accommodation Review Document Wizard. You will students where you are a Case Manager and students where you are on a Team.
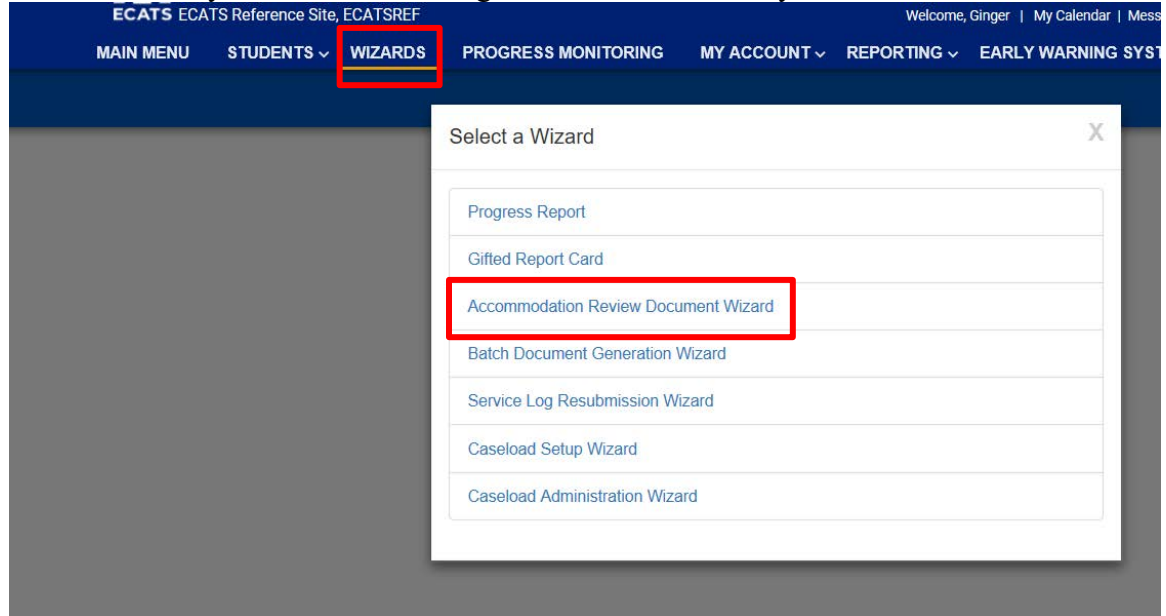
2. Select the student(s) you would like to generate this document for and click 'Continue'.
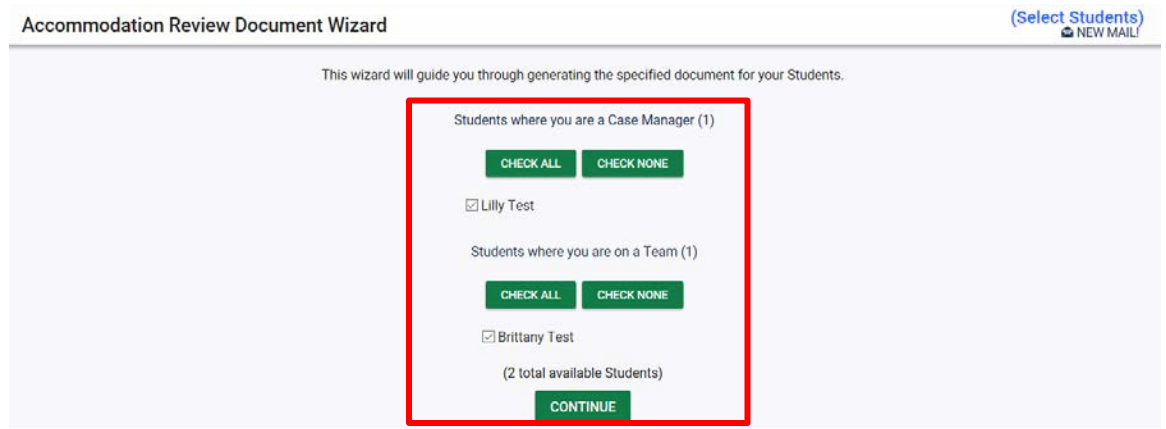
3. The student's name will be in the upper right-hand corner of your screen. Select the Area to review which is IEP. If the dropdown is blank, then the student does

not have a finalized IEP in the system so you can select 'Skip This Student' at the top of the screen to move to the next student.

4. Select 'IEP' from the dropdown for area to review. The state tests with accommodations from the student's finalized IEP will be displayed.

5. To create the Accommodation Review, select the test(s) and click 'Create Draft and Move to the Next Student' or 'Create Final and Move to the Next Student'. (Clicking 'Just Update the Database' will save and keep you on that student. 'Update and Move to the Next Student' will save and move you to the next student. These two options will not create a document.)

6. Once you have created the document for each of the students, select the checkbox under Batch and click 'View Document Batch'. This will bring up the pdf of all documents you selected. Draft documents will have the word Proposed as a watermark.

7. Click the printer icon or right click and click 'Print'.

PROGRESS REPORT WIZARD

The "Wizards" tab on the Main Menu allows you to create progress reports. As an IEP Team member, you will be able to update the status of goals and/or objectives. To generate progress reports for a student, you must be their Case Manager and they must have a finalized currently valid IEP in the system.

Using the Progress Report Wizard
1) The School Year field defaults automatically to the current school year.
2) Select the appropriate reporting period from the drop-down menu.
3) Select the student(s) for whom you would like to update status and/or generate Progress Reports for by checking the box next to their name.
4) Click the 'Continue' button.
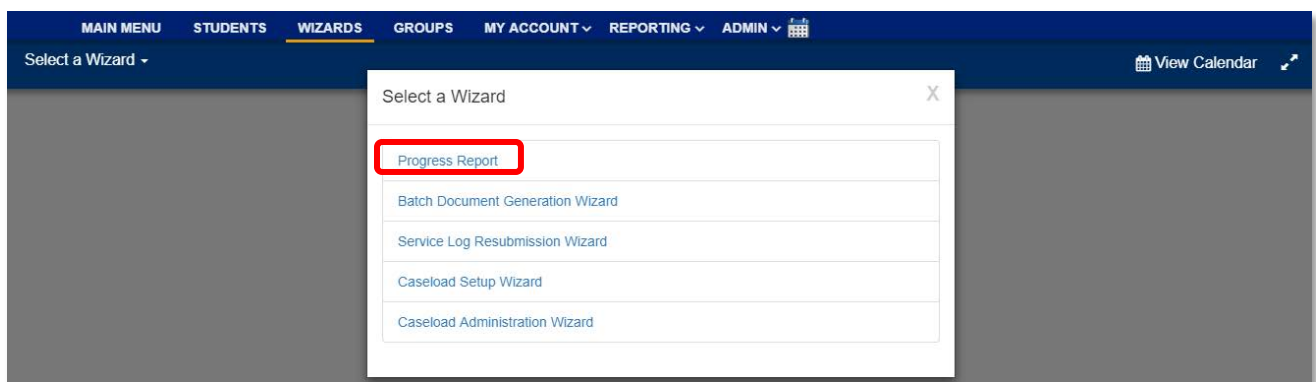
After clicking the 'Continue' button, you will be asked to enter the Status for each Annual Goal. Once this is complete, you can click on one of five buttons:
1) 'Skip this Student' – Click this if you do not want to create a Progress Report.
2) 'Create Final Progress Report and Move to Next Student'.
3) 'Create Draft Report and Move to Next Student'.
4) 'Just Update the Database' – This will save the information without creating a Progress Report. You will return to the Wizards main screen.
5) 'Update and Move to Next Student' – This will save the information without creating a Progress Report. You will go to the next student's screen.

USER MANAGEMENT

As an administrator in ECATS, you may be responsible for setting a user's usertype and other areas of user management.

To access a user's record, hover over "Admin" and click "Users".
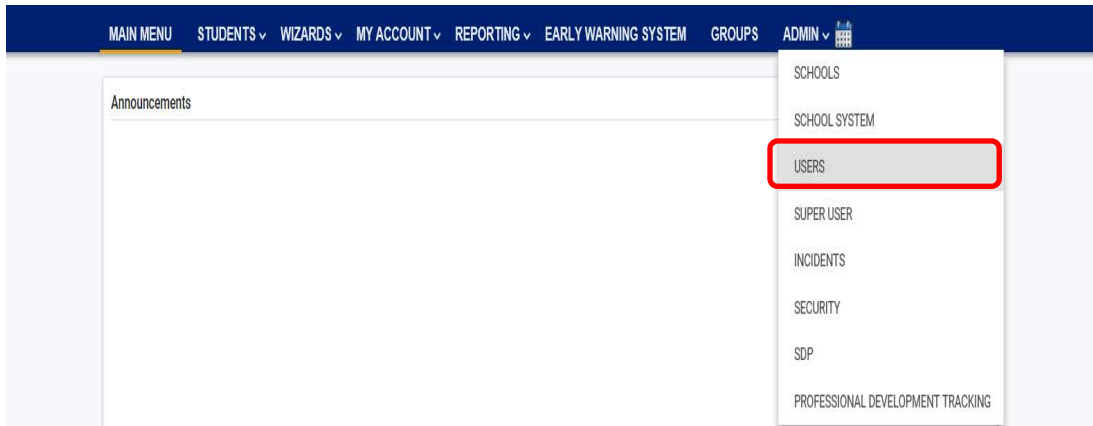
On this page, search for a user. On the search results page, you can view the caseload compliance (hover over the compliance symbol), school access, and the number of students she is case manager for, the total number of students on her caseload, title, and ECATS user type. To review or edit other user permissions, click on the user's name.

On the user page, you can make some changes to user access, update certifications, and change the usertype. If you are unable to change the usertype, then you may not have sufficient permissions and will need to contact an administrator with greater access. You can also add service certifications for special education and related services. Click "Update the Database" to save your changes. Special note – if you change your own user type to one with less permissions, you will not be able to change yourself back.

If you are assisting a user and would like to see ECATS with her view and permissions, you can use the impersonate feature. To access this feature, search for a user and then click on the silhouette in the IM column. This will automatically redirect you to the Main Menu page with the selected users view. Now you can view her caseload, and access ECATS with her permissions. To remove the impersonation feature, scroll to the bottom of the screen and hover over the blue bar. You will see the user's name you are impersonating, click the name and then you will return to your own view.

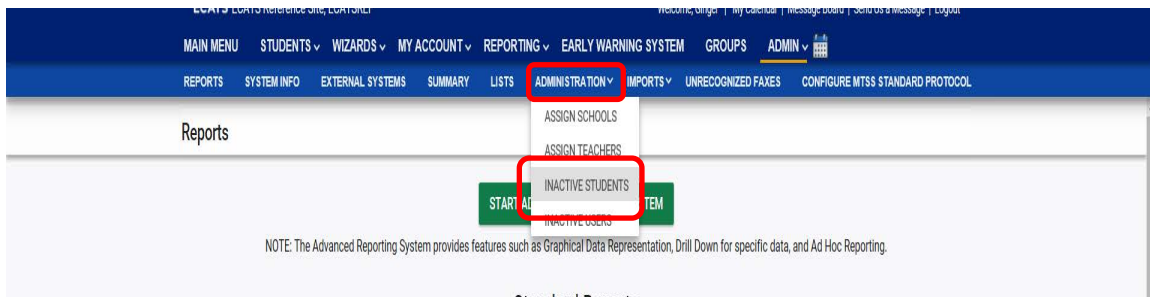## INACTIVE STUDENTS

To search for an inactive student in ECATS:
1) Hover over "Admin" and click "School System".
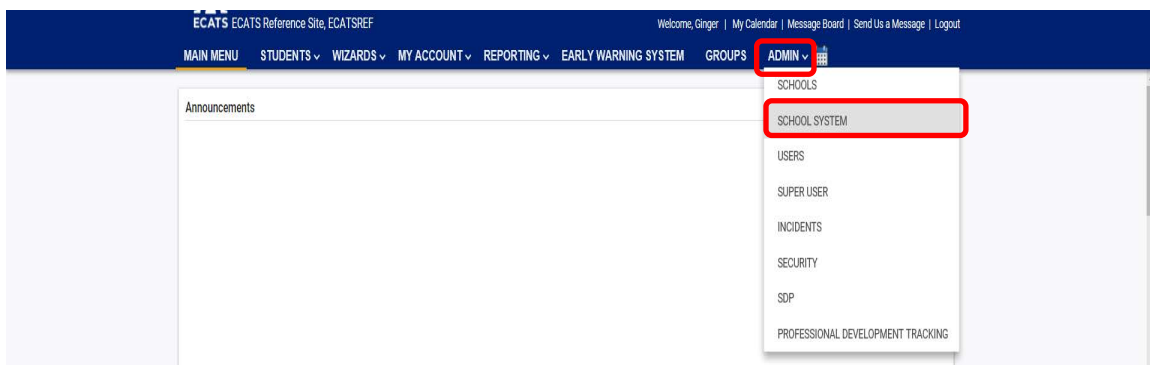
2) On this page, click "Administration" and then click "Inactive Students".

3) Enter your search criteria and then click "View Inactive Students".

4) Click the student's name to enter the record. You will see additional tabs which allow you to view the student's information.

Exiting Student Information

Sabrina Test - 100078 | 08/19/2005
Training School | TS

Date Exited: 09/18/2018

Reason for Exiting: W2 Early Leaver Withdrawal

Modified Exit Reason: [   ]

UPDATE THE DATABASE

Re-Activation Date: 07/08/2019

RE-ACTIVATE THIS STUDENT IN THE DATABASE

PERMANENTLY DELETE THIS STUDENT

5) To modify an exit reason for a student, click on the dropdown and select the appropriate reason. Note: This is only editable if the student was EC at the time of exiting the district. Only authorized users can modify the exit reason for a student.

LOGGING OUT OF ECATS

From the Main Menu:

To log out of ECATS:
1) Click the "Log Out" tab at the right of the menu bar.
2) After logging out, close the browser:

- Log out from any part of the system.
- Users do not have to go back to the Main Menu.
- Users must log out of ECATS and close browser if users:
  o Step away from the computer.
  o Finish using the system.
  o Leave for the day.

Always Log Out and Exit the Browser

If users do not Log Out and close the browser, anyone can access information in ECATS or record information under user's log-in name.