



# ***Synergy SE***<sup>©</sup>

## **National Documents Guide**



**Edupoint Educational Systems, LLC**  
1955 South Val Vista Road, Suite 200  
Mesa, AZ 85204  
Phone (877) 899-9111  
Fax (800) 338-7646

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# ABOUT THIS MANUAL

Edupoint Educational Systems develops software with multiple release dates for the software and related documentation. The documentation is being released in multiple volumes to meet this commitment.

The table below lists the release date, software version, documentation volume number, and the content included in each volume of documentation to date.

## Software and Document History

Date	Volume	Edition	Revision	Content
August 2012	1	1	1	Initial release of this document. This document with this title is new. The content was formerly a part of the Synergy SE User Guide. It includes new screens and functionality from the November 2011 release.

## CONVENTIONS USED IN THIS MANUAL

### **Bold Text**

**Bold Text** - Indicates a button or menu or other text on the screen to click, or text to type.



**Tip** – Suggests advanced techniques or alternative ways of approaching the subject.



**Note** – Provides additional information or expands on the topic at hand.



**Reference** – Refers to another source of information, such as another manual or website



**Caution** – Warns of potential problems. Take special care when reading these sections.

## BEFORE YOU BEGIN

Before installing any of the Edupoint family of software products, please be sure to rescreen the system requirements and make sure the district's computer hardware and software meet the minimum requirements. If there are any questions about the system requirements, please contact an Edupoint representative at (877) 899-9111.



**Caution:** The Edupoint family of software does not support the use of pop-up blockers or third-party toolbars in the browser used to access Synergy SE. Please disable any pop-up blockers (also known as pop-up ad blockers) and extra toolbars in the browser before logging into any Edupoint product.

At any point, if there are any technical difficulties, please contact the Edupoint technical support team at [support@edupoint.com](mailto:support@edupoint.com) or by phone at 1-877-899-9111 option 1.

# Chapter One: MANAGING SYNERGY SE DOCUMENTS

In this chapter, the following topics are covered:

- ▶ Documents Overview
- ▶ Ad Hoc Documents Overview
- ▶ Historical Documents Creating and Viewing
- ▶ Process Documents Creating, Editing and Viewing

## SE DOCUMENT OVERVIEW

There are three main groups of documents for the SE student: Ad Hoc, Historical, and Process documents.

- **Ad Hoc**

Synergy SE Ad Hoc documents are special education documents created for a specific purpose. They are not necessarily used in every special education student's documentation. An example of an Ad Hoc document might be a More Restrictive Placement document or a Notice of Refusal of Evaluation document.

Ad Hoc documents are found on the SE Student, Ad Hoc Documents tab. They can be accessed directly from there by clicking the Edit link. To access them on the Portfolio screen, click the Edit link under the Ad Hoc Docs column.

- **Historical**

Synergy SE Historical documents are the documents that have been completed and finalized in Synergy SE. This area contains attached documents, also.

Historical documents are found on the SE Student, Historical Documents tab. They can be accessed directly from there by clicking the View link. To access them on the Portfolio screen, click the View link under the Historical Docs column.

- **Process**

Synergy SE Process documents are the required documents that pertain to the various special education processes such as an initial evaluation or an annual review. An example of a Process document would be the IEP.

Process documents are found on the SE Student, Process Docs tab. They can be accessed by clicking on the specific document icon in the Doc column. To access them on the Portfolio screen, click the specific document icon under the Process Docs heading.



**Note:** For a list of Ad Hoc and Process documents see: [Ad Hoc Documents](#) and/or [Process Documents](#). This list may not be a complete list, as your district may have additional or similar documents.

# NAVIGATION

## NAVIGATE TO THE SE STUDENT SCREEN:

1. Open the Synergy SE Navigation Tree by clicking on the **Tree** button.



Figure 1-1 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or ▶ pointing next to the word. Once clicked, the triangle will turn green ▼ and point downward.

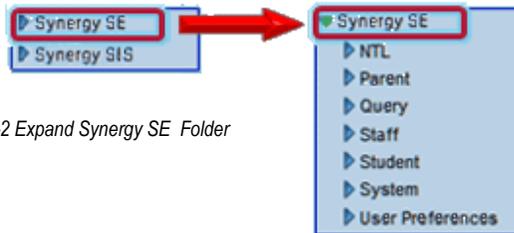


Figure 1-2 Expand Synergy SE Folder

3. Under the Synergy SE folder, click on the name **Student** or ▶ pointing right next to it.

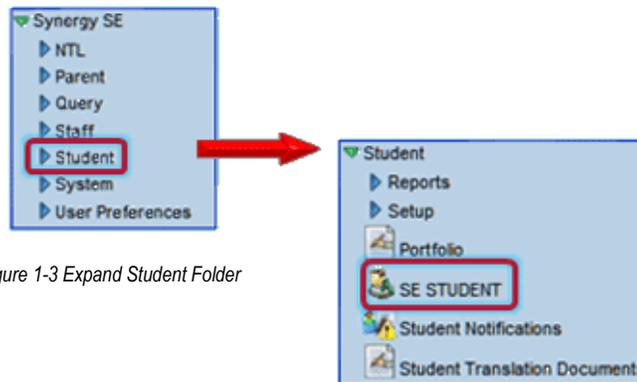


Figure 1-3 Expand Student Folder

4. Click on the SE Student screen.
5. Select from one of the tabs described above.
6. Select the document by clicking on the appropriate link.

## NAVIGATE TO THE PORTFOLIO SCREEN:

1. Open the Synergy SE Navigation Tree by clicking on the Tree button.



Figure 1-4 Synergy Navigation Tree

- Expand the Synergy SE folder by clicking on the name **Synergy SE** or ▶ pointing next to the word. Once clicked, the triangle will turn green ▼ and point downward.

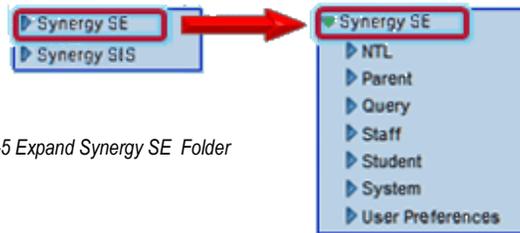


Figure 1-5 Expand Synergy SE Folder

- Under the Synergy SE folder, click on the name **Portfolio** or click ▶ pointing right next to it.

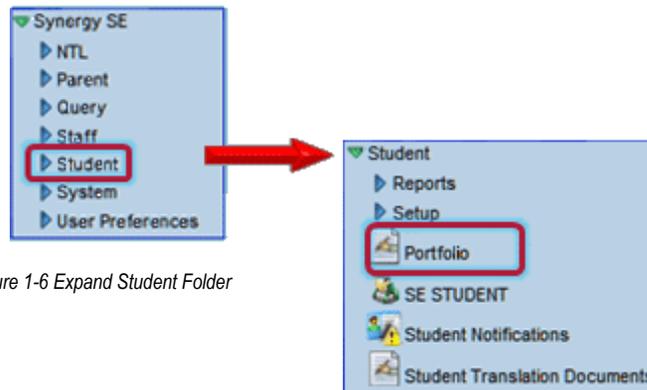


Figure 1-6 Expand Student Folder

- Click on the **Portfolio** screen. Process documents are represented by colored icons that signify their status of completion

PROCESS DOCS ICON COLOR LEGEND	
▲	Document not yet created.
⬡	Document has been created but has not been Finalized.
●	Document has been Finalized (locked) and can no longer be edited.

Figure 1-7 Process Docs Icon Color Legend

- Click on the document icon or link to open it in edit mode. The Historical documents are view only.

# EDITING DOCUMENTS

## UNDERSTANDING SE DOCUMENT PROPERTIES

SE Document properties differ in their ability to be edited and saved. This is intentional for several reasons. By law, certain documents may not be changed once the multidisciplinary education team has agreed on the contents. They may be amended and duplicated but the original document needs to stay intact.

However, unintentional errors can occur when composing documents. Synergy SE helps to ensure accuracy by validating and finalizing documents. Validating a document means the document is being checked for errors. If errors are found, the document may be edited again and then validated again. This process can be done over and over. If the document is validated and no errors are found, it may be finalized or it may be saved for further edits. Once a document is finalized, it is complete and no longer an editable document.

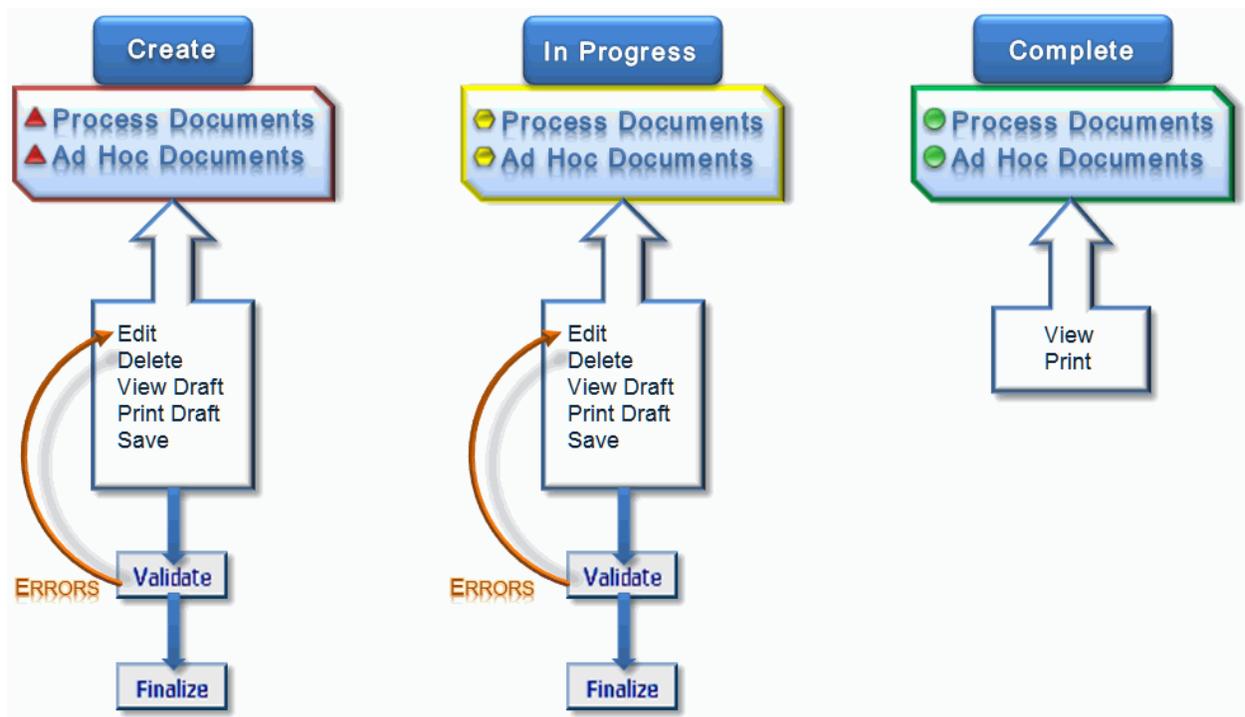


Figure 1-8 SE Document Properties

## MULTIPLE USERS IN A DOCUMENT

Two or more users can work in the same document concurrently while saving their data; however, those users will not be able to edit the same field at the same time.

For example, if both users are in the Referral document and editing the **Reason for Referral** textbox, the first user who clicks  will have their data saved.

The second user will receive the following warning message upon clicking .



Figure 1-9 Multiple Users Message



**Note:** This warning message is defined locally and may be worded differently by your system administrators.

The second user will need to copy their data to another location (i.e. Word, Notepad) momentarily, and **Refresh** the screen (click ) to allow the other user's entry to appear. Then the user can copy and paste their original data to that field and click .

## DELETING A DOCUMENT

An existing document can be removed by using the Delete feature. Access to the Delete button is governed by the security rights and may not be available to all users.

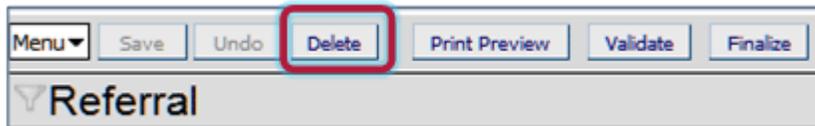


Figure 1-10 Delete Button

To delete a document:

1. Click the **Delete** button located at the top of the document. If the Delete button is grayed out (not clickable), click  or . A message will display confirming the deletion of the document.

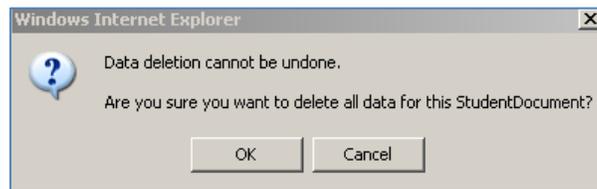


Figure 1-11 Data Deletion Warning

2. To continue with the deletion, click **OK**. To cancel the deletion, click **Cancel**. The document will close and the system will return to the previous screen.

## PRINTING A DOCUMENT

Printable versions of documents are available at any time during the document editing process. A document does not need to be validated or finalized prior to viewing or printing the document.



**Note:** In order to generate printable Synergy SE documents, Adobe Acrobat Reader must be installed on the user's computer.

To obtain a printable version of a document:

1. Click the **Print Preview** button in the Action bar of the document. If the Print Preview button is grayed out (not clickable), click  or .

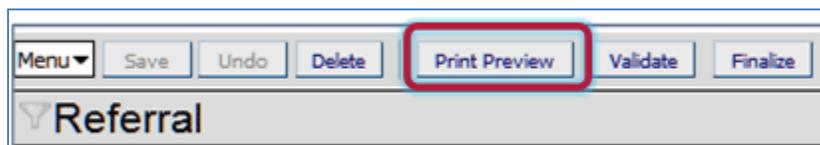


Figure 1-12 Print Preview Button

A message displays informing the user to wait. The printable document opens in Acrobat Reader.



Figure 1-13 Print Progress Status

## VALIDATING A DOCUMENT

Before a document can be finalized, validation must occur. This process compares data entered in the document against rules established by the district to find omissions, data conflicts or invalid selections. If errors are found, a window opens that contains a list of the errors.

To validate a document:

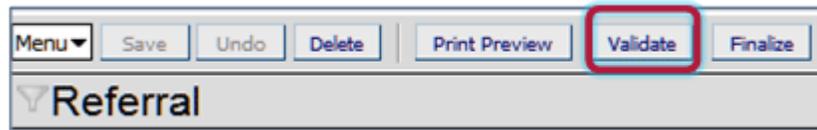


Figure 1-14 Validate Button

2. Click the **Validate** button in the Action Bar of the document. If the Validate button is grayed out (un-clickable) Click  or .

If validation errors exist, the Revelation Document Errors screen displays, detailing the errors.

2 validation errors were found					
Document Errors					
Line	View	Tab	Grid/Tree	Control	Error Message
1	Prior Written Notice	Prior Written Notice			A response to 'Explanation of why the district proposes or refuses to take the action' is required.
2	Prior Written Notice	Prior Written Notice			Explanation of why the district proposes or refuses to take the action' is required.

Figure 1-15 Revelation Document Errors Screen

3. Click anywhere on the line of the **Document Error**. The line highlights green. The document displays with the specific validation error highlighted in pink.

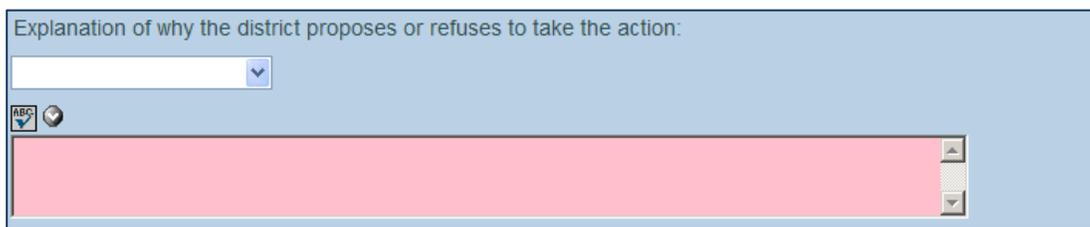


Figure 1-16 Document Error

4. Make the correction in the highlighted field and click .
5. Proceed to the next validation error on the list by clicking anywhere in the row of that error.
6. Follow step 3 and 4 until all validation errors have been addressed.
7. **Close** the Validation Document Errors window.



Figure 1-17 Close Window

8. If desired, click on the **Validation** button again to re-check the validation status. A message box displays stating that no validation errors were found.

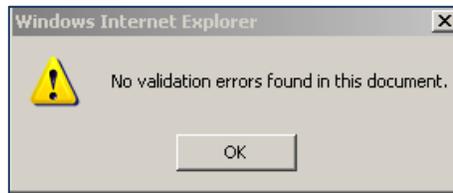


Figure 1-18 No Validation Errors Found

## FINALIZING A DOCUMENT



**Caution:** Finalizing a document prepares *most* documents for moving to the historical document file, after the process move. However, there are documents, that when finalized, begin the process move procedure OR exit the student from special education. These documents include the IEP as well as certain Prior Written Notices. [See Documents with Unique Functionality](#) for more detail. The IEP is the main “trigger” document that moves all created documents including the IEP itself, to Historical Documents. See [Process Documents – Finalizing the IEP](#) for detailed information.

When a document is complete and has been validated, it will need to be finalized. This action will prepare the document to move to the student’s historical document file when the process change occurs.

Once a document is finalized, it will no longer be editable. The document will open as a read-only PDF document (Acrobat Reader is required). The icon representing the document will turn from yellow to green.

To Finalize a Document:

 **Note:** The validation process runs automatically when a document is finalized. If the document is found to have validation errors, the user must follow the steps required in the [Validating a Document](#) process. Once the validation errors are corrected the document will finalize properly.

1. Click the **Finalize** button in the Action Bar of the document. If the Finalize button is grayed out (un-clickable) click  or . .

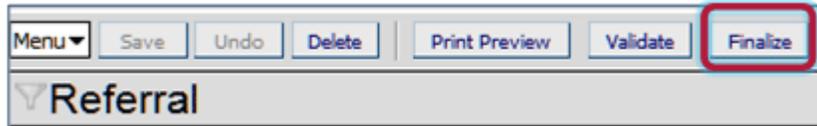


Figure 1-19 Finalize Button

A printable (but no longer editable) document displays. The finalized document displays a green icon. When clicked, the document will open only as read-only.

### CREATING MULTIPLE DOCUMENTS

Documents such as Meeting Requests and Parent Permission can have additional versions created after the original document has been finalized. For example, if a Meeting Request was created and sent to the parent but later the meeting had to be cancelled due to a no show or some other reason, a new meeting request can be created. The original request document will be saved along with the new request document. This will provide a history of the meetings that were attempted to be set up.

 **Note:** Each School District has the ability to apply the “Allow Multiple” feature to other Synergy SE Documents. Check with your district’s system administrator for a full list of these documents.

This example will show how to create multiple IEP Meeting Request documents using the IEP Meeting Request. The original meeting request has been created but the meeting was cancelled due to the parent not showing up.



Figure 1-20 Finalize Button

1. If the original meeting request has not been finalized, do so now.

The meeting request icon displays green, indicating that it has been finalized.



Figure 1-21 Finalized Document Icon

2. Click on the **green icon** to access the new meeting request template. The **DocumentViewList** screen opens.

The DocumentViewList screen contains a Create button as well as a list of previously finalized Meeting Requests. This list provides information on the original Meeting Request documents including when the document was created and finalized as well as who created and finalized the document. The PDF icon is the link to view the finalized original document.

The screenshot shows the 'DocumentViewList' interface for a student named 'Abbott, Billy C.' (Gender: Male, Grade: 12). It features a 'Draft Document' section with a 'Create' button and a 'Finalized Document(s)' section with a table. The table has columns for Line, Document Name, Created On, Created By, Finalized On, Finalized By, and a PDF icon. The first row shows a 'IEP Meeting Request' document created on 08/06/2012 by Admin User and finalized on 08/13/2012 by Admin User. The PDF icon in the last column of this row is highlighted with a red box.

Line	Document Name	Created On	Created By	Finalized On	Finalized By	PDF
1	IEP Meeting Request	08/06/2012	Admin User	08/13/2012	Admin User	

Figure 1-22 Meeting Request Document View List

3. Click the **Create** button. A new Meeting Request template displays. This document will represent the new meeting that has been rescheduled. Once this document is finalized, it displays in the finalized Document list along with the original document.

All multiple documents will move along with the process documents to the student's Historical Documents during the normal process move procedure.

## AD HOC DOCUMENTS

Synergy SE Ad Hoc documents are special education documents created for a specific purpose. They are not necessarily used in every special education student's documentation. An example of an Ad Hoc document might be a More Restrictive Placement document or a Notice of Refusal of Evaluation document. Ad Hoc documents contain editable as well as print only documents.



**Note:** For the purpose of illustration the following screen shots contain an abbreviated list of available Ad Hoc documents. For a list of Ad Hoc and Process documents see [Ad Hoc Documents](#) and/or [Process Documents](#). These lists may not be complete, as your district may have additional or similar documents added.

The Ad Hoc Documents tab contains the student's demographic information in the top section.

- **Existing Documents**  
This section includes all Ad Hoc documents that have been created for the student, including Print Only documents.
- **Document Creation**  
This section includes the list of all Ad Hoc documents available for creation. (Please see note above for list.)
- **Create**  
This link will create a new Ad Hoc Document and make it available to edit.
- **Edit**  
This link will open a previously created document and make it available to edit.
- **View**  
This link will open a *finalized* Ad Hoc document. These documents are printable but read-only.

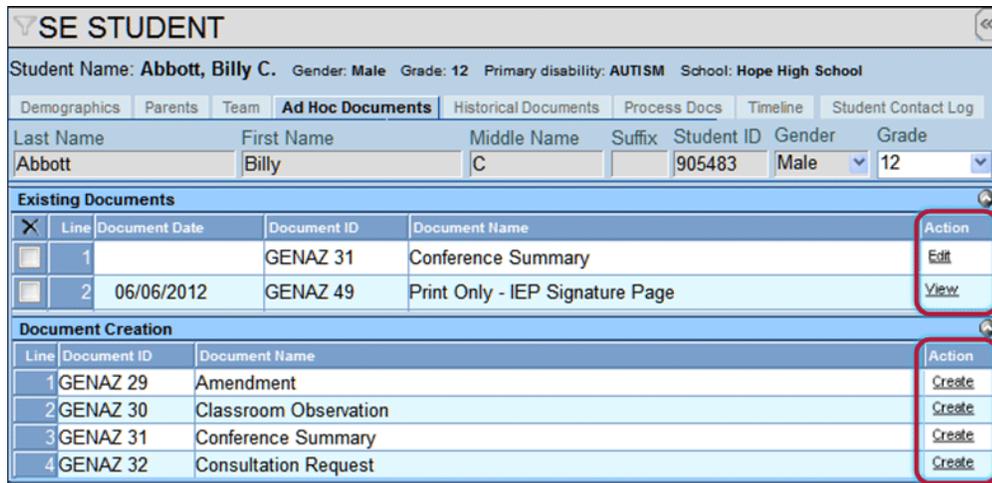


Figure 1-23 Student SE Screen Ad Hoc Documents Tab

The following example demonstrates how to create an Ad Hoc document using the Consultation Request (GENAZ 32), however, other documents could be used (excluding Print Only).

1. Locate **GENAZ 32 Consultation Request** in the Document Creation grid.
2. Click on the **Create** link in the Action column for this document. A new Consultation Request Document opens.

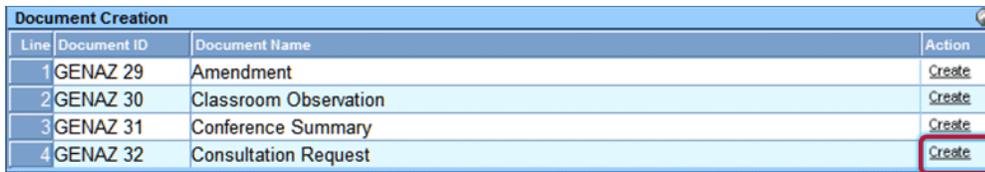


Figure 1-24 Student SE Screen Ad Hoc Documents Tab Document Creation

3. Edit and enter data as appropriate.

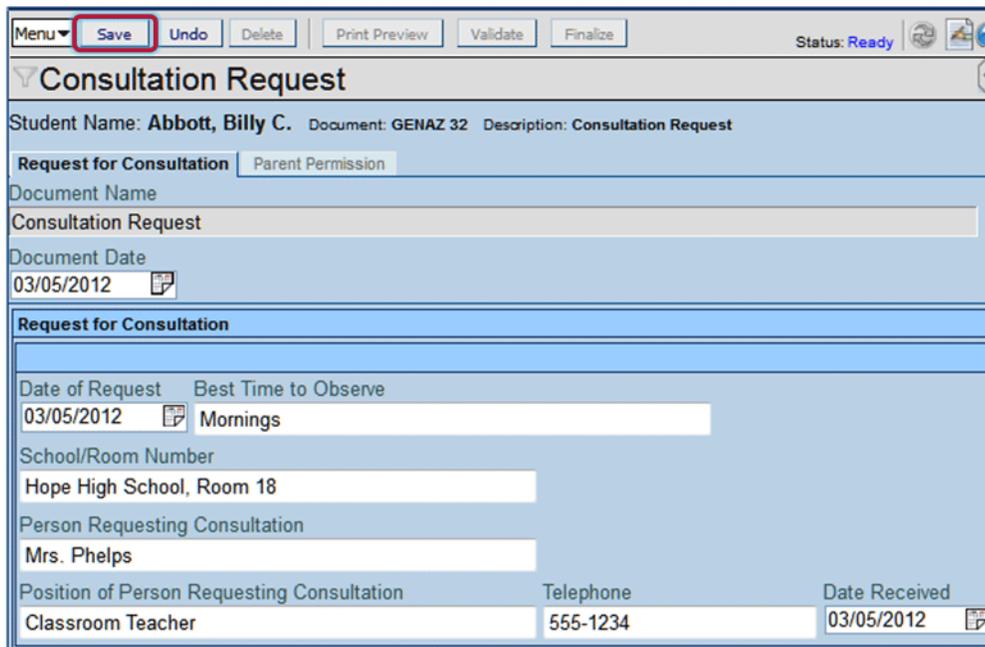


Figure 1-25 Consultation Request Screen Save Button

4. Click **Save** to save changes and **Close** the document.

The Ad Hoc Document window displays the Consultation Request document in the Existing Documents section of the screen.

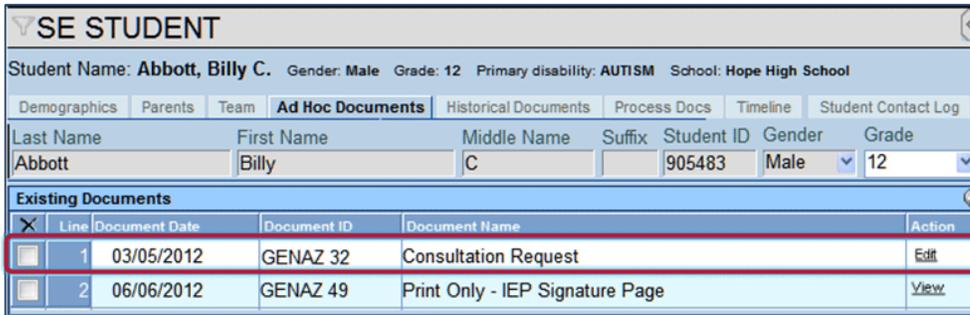


Figure 1-26 Student SE Screen Ad Hoc Documents Tab Existing Documents

At this point, the Consultation Request document is available for updates as additional data becomes available or the document can be finalized. Once the document is finalized, the Action column link will change from Edit to View. The document displays in read-only mode (PDF).

### CREATING MULTIPLE AD HOC DOCUMENTS

The following example demonstrates how to create multiple Ad Hoc documents using the Consultation Request (GENAZ 32), however other documents could be used (excluding Print Only).

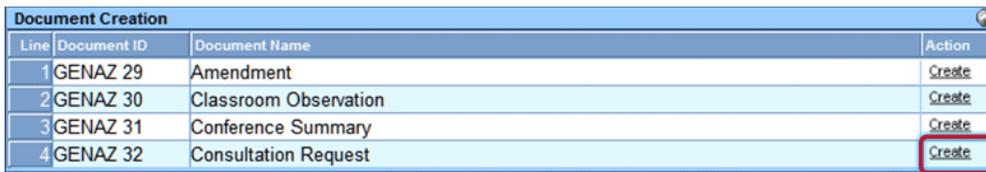


Figure 1-27 Student SE Screen Ad Hoc Documents Tab Create Link

1. Locate **GENAZ 32 Consultation Request** in the Document Creation grid.
2. Click on the **Create** link in the Action column for this document. A new Consultation Request Document opens.
3. Edit and enter data as appropriate.
4. Click  to save changes and **Close** the document.

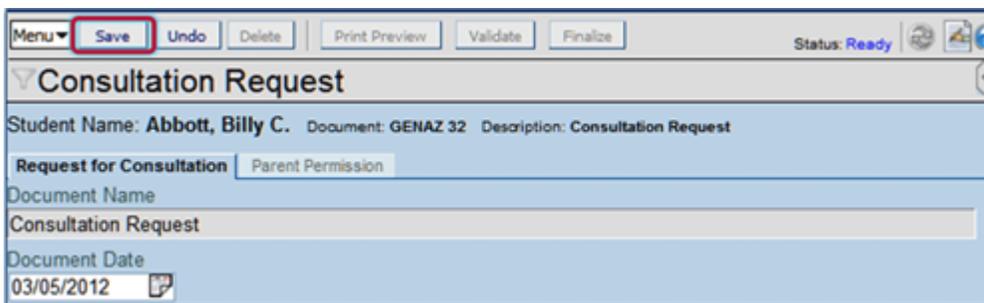


Figure 1-28 Student SE Screen Ad Hoc Documents Tab Save Button

The new Consultation Request document displays in the Existing Documents section.

SE STUDENT						
Student Name: <b>Abbott, Billy C.</b> Gender: <b>Male</b> Grade: <b>12</b> Primary disability: <b>AUTISM</b> School: <b>Hope High School</b>						
Demographics Parents Team <b>Ad Hoc Documents</b> Historical Documents Process Docs Timeline Student Contact Log						
Last Name	First Name	Middle Name	Suffix	Student ID	Gender	Grade
Abbott	Billy	C		905483	Male	12
Existing Documents						
Line	Document Date	Document ID	Document Name	Action		
1	03/05/2012	GENAZ 32	Consultation Request	Edit		
2	03/05/2012	GENAZ 32	Consultation Request	Edit		
3	06/06/2012	GENAZ 49	Print Only - IEP Signature Page	View		

Figure 1-29 Student SE Screen Ad Hoc Documents Tab Multiple Ad Hoc Documents

At this point, the second Consultation Request document is available for updates as additional data becomes available or the document can be finalized, just like the first. Once the document is finalized, the Action column link will change from Edit to View. The document displays in read-only mode (PDF).

**Note:** Based on decisions made the school district system administrator, certain Ad Hoc documents may not be available for duplication. The following message displays after clicking Create:

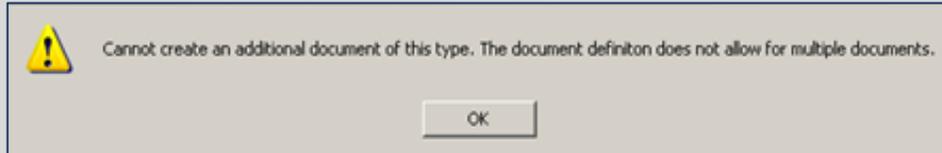


Figure 1-30 Cannot Create Multiple Docs Message

*This message indicates that the system has been set to not allow multiple types of the requested document.*

## PRINT ONLY AD HOC DOCUMENTS

Print-only Ad Hoc documents open as read-only (PDF) documents. They are not editable; however they include the individual demographic data of each student. The date that appears on the document is the date when the print-only document was initially created or opened. Print-only documents are labeled Print Only in the Document Name column.

View Print-Only Ad Hoc Document:

1. In the Document Creation section, click the **Create** link in the Action column. The document displays in read-only (PDF) which is printable.

Document Creation			
Line	Document ID	Document Name	Action
1	GENAZ 24	Transfer Process	Create
2	GENAZ 29	Amendment	Create
3	GENAZ 30	Classroom Observation	Create
4	GENAZ 31	Conference Summary	Create
5	GENAZ 32	Consultation Request	Create
6	GENAZ 33	Consultation Request - PreSchool	Create
7	GENAZ 34	Functional Behavior Assessment Plan	Create
8	GENAZ 37	Manifestation Determination and Review Documentation	Create
9	GENAZ 38	Meeting Request	Create
10	GENAZ 39	More Restrictive Placement Referral	Create
11	GENAZ 40	Prior Written Notice	Create
12	GENAZ 41E	Notice of Refusal of Evaluation	Create
13	GENAZ 41F	Notice of Refusal of FAPE	Create
14	GENAZ 42	Request for Bilingual Transcription	Create
15	GENAZ 43	Summary of Performance	Create
16	GENAZ 44	Transportation Request	Create
17	GENAZ 45	Print Only - Alternate Assessment Eligibility Criteria Form	Create
18	GENAZ 46	Print Only - APE Instruction Letter - Print	Create
19	GENAZ 47	Print Only - Eye Exam Report	Create
20	GENAZ 48	Print Only - IEP Attendance Form	Create
21	GENAZ 49	Print Only - IEP Signature Page	Create
22	GENAZ 50	Print Only - Information Processing Worksheet for SLD	Create

Figure 1-31 Create Print Only Document

The Print Only Document displays in the Existing Document section with **View** as the Action link.

SE STUDENT						
Student Name: <b>Abbott, Billy C.</b> Gender: Male Grade: 12 Primary disability: AUTISM School: Hope High School						
Demographics Parents Team <b>Ad Hoc Documents</b> Historical Documents Process Docs Timeline Student Contact Log						
Last Name	First Name	Middle Name	Suffix	Student ID	Gender	Grade
Abbott	Billy	C		905483	Male	12
Existing Documents						
X	Line	Document Date	Document ID	Document Name	Action	
<input type="checkbox"/>	1	03/05/2012	GENAZ 32	Consultation Request	Edit	
<input type="checkbox"/>	2	03/05/2012	GENAZ 32	Consultation Request	Edit	
<input type="checkbox"/>	3	03/05/2012	GENAZ 49	Print Only - IEP Signature Page	View	

Figure 1-32 Print Only Doc in Existing Docs

## DELETING AD HOC DOCUMENTS



**Note:** The ability to delete a document is based on a user's security level set up by individual district administration.

To delete an Ad Hoc document:

1. Check the box on line of document to delete.

2. Click  at the top of the screen. The document is permanently deleted.

SE STUDENT						
Student Name: <b>Abbott, Billy C.</b> Gender: <b>Male</b> Grade: <b>12</b> Primary disability: <b>AUTISM</b> School: <b>Hope High School</b>						
Demographics		Parents		Team		Ad Hoc Documents
Historical Documents		Process Docs		Timeline		Student Contact Log
Last Name	First Name	Middle Name	Suffix	Student ID	Gender	Grade
Abbott	Billy	C		905483	Male	12
Existing Documents						
X	Line	Document Date	Document ID	Document Name	Action	
<input checked="" type="checkbox"/>	1	03/05/2012	GENAZ 31	Conference Summary	Edit	
<input type="checkbox"/>	2	03/05/2012	GENAZ 32	Consultation Request	Edit	
<input type="checkbox"/>	3	06/06/2012	GENAZ 49	Print Only - IEP Signature Page	View	

Figure 1-33 Delete Column in Ad Hoc Documents

## MOVING AD HOC DOCUMENTS TO HISTORICAL DOCUMENTS

Finalized Ad Hoc Documents will be moved to the student’s Historical Documents whenever a Process Rollover is conducted. There are a few exceptions to this rule.

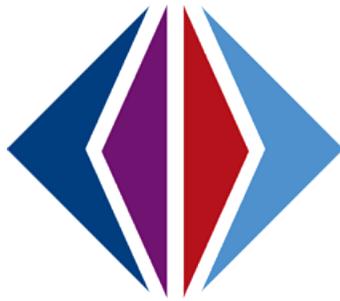
Print Only Ad Hoc documents are not saved to the student’s Historical Documents file. Once a Print Only Ad Hoc document is generated, it resides in the Ad Hoc, Existing Documents list until a Process Rollover is conducted. At that point, all Print Only Ad Hoc documents are permanently removed from the system.

Certain Ad Hoc documents, such as the Consultation Request, are not required to be finalized at the time of a Process Rollover. The system allows the user to follow through with the Process Rollover and leave the Consultation Request in edit mode. The Consultation Request will continue to reside in Ad Hoc until finalized. The finalized version of this document will move to Historical Documents during the next Process Rollover.

Ad Hoc documents such as the Prior Written Notice and Meeting Request are required to be finalized prior to any Process Rollover. At that point they will be moved to Historical Documents with the student’s current process documents.



**Note:** Each school district’s system administrator has the ability to set Ad Hoc documents up “Outside the Process”, which means they are not required to be finalized in order to conduct a Process Rollover. They move to Historical Documents during the next Process Rollover **only** if finalized.



# Chapter Two: AD HOC DOCUMENTS

In this chapter, the following topics are covered:

- ▶ What SE Ad Hoc Documents are available
- ▶ How to create, save, validate and finalize specific documents

## AD HOC DOCUMENTS

GENAZ 30	Classroom Observation
GENAZ 31	Conference Summary
GENAZ 32	Consultation Request
GENAZ 33	Consultation Request PreSchool
GENAZ 34	Functional Behavior Assessment Plan
GENAZ 37	Manifestation Determination and Review Documentation
GENAZ 38	Meeting Request
GENAZ 39	More Restrictive Placement Referral
GENAZ 40	Prior Written Notice
GENAZ 41E	Notice of Refusal of Evaluation
GENAZ 41F	Notice of Refusal of FAPE
GENAZ 42	Request for Bilingual Transcription
GENAZ 43	Summary of Performance
GENAZ 44	Transportation Request
GENAZ 45	Print Only Alternate Assessment Eligibility Criteria Form
GENAZ 46	Print Only APE Instruction Letter Print
GENAZ 47	Print Only Eye Exam Report
GENAZ 48	Print Only IEP Attendance Form
GENAZ 49	Print Only IEP Signature Page
GENAZ 50	Print Only Information Processing Worksheet for SLD
GENAZ 51	Print Only Medical Verification For Other Health Impaired (OHI)
GENAZ 52	Print Only Medical Verification For Orthopedically Impaired (OI)
GENAZ 53	Print Only Medical Verification For Traumatic Brain Injury (TBI)

GENAZ 54	Print Only Photo Release
GENAZ 55	Print Only Reevaluation Agreement
GENAZ 70	Print Only MET Review
GENAZ 71	Print Only Special Ed Signature Checklist
GENAZ 72	Print Only Special Activity Request
GENAZ 73	Print Only Transportation Monitor Request
GENAZ 74	Print Only Internet and Media Opt Out Form English
GENAZ 75	Print Only Internet and Media Opt Out Form Spanish
GENAZ 99	Behavior Intervention Plan
GENAZ 100	Notice of Graduation
GENAZ 500	ESY Letter
GENAZ 501	TAP Letter
GENAZ 502	TAP Parent Notice
GENAZ 503	ESY Eligibility Profile
GENAZ 504	Notice of Section 504 Student Eligibility Form
GENAZ 505	ESY Addendum
GENAZ 700	Health Aide Prepayment Review Form

## GENAZ 30 – CLASSROOM OBSERVATION

The Classroom Observation contains one tab:

- **Classroom Observation**

**ClassroomObservation**

Student Name: Tacho, Katherine A. Document: GENAZ 30 Description: Classroom Observation

**Classroom Observation**

Document Alias  
Classroom Observation

Document Date

Name and Job Title of Observer

Date of Observation

Beginning and Ending Time of Observation

Location of Observation

Activity Observed

Description of Physical Environment

Number of students and adults in classroom

In the sections below, choices are Yes, No or Not Observed  
All "No" answers require explanation.

Appearance

Learning Behaviors

Social and Compliance Behaviors

Observation Notes

Figure 2-1 Classroom Observation

To create a Classroom Observation document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. Enter **Name** and **Job Title of Observer** in the textboxes provided
3. Enter **Date of Observation** (MMDDYY) or click and select date.
4. Enter **Beginning and Ending Time of Observation** (HHMM - 0800 for 8:00 AM, 0120 for 1:20 PM, etc.).
5. Enter data in textboxes provided.
6. Appearance, Learning Behaviors and Social and Compliance Behaviors sections are composed of **Yes / No / Not Observed** drop downs. If **No** is selected, enter explanation in textbox provided.

7. Click  on the title bar to view, if necessary.



Figure 2-2 Dropdown Access

8. An **Observation Notes** **textbox** is available, if needed. Click  to spell check. Click  for additional space.
9. Click  at top of the screen when finished.

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 31 – CONFERENCE SUMMARY

The Conference Summary contains two tabs:

- **Conference Summary**
- **Recommendations**

Figure 2-3 Conference Summary

To create a Conference Summary document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. Check the Conference Summary type.
3. An **Other** checkbox is available with a textbox for explanation, if needed. Click to spell check. Click for additional space.

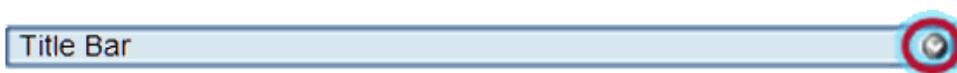


Figure 2-4 Dropdown Access

4. Click on the title bar to view, if necessary.
5. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.

Parent(s)/Guardian(s)					
Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Participant
1	Kelly, Louise	Mother	Yes	Yes	<input checked="" type="checkbox"/>
2	Wilkinson, Samuel	Step-Father	Yes	Yes	<input type="checkbox"/>
3	Smith, Brian	Father	No	No	<input type="checkbox"/>

Figure 2-5 Parent(s)/Guardian(s) Check Parent

- On the Parent(s)/Guardians(s) section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student’s Team List. Names can be added or removed from the staff section of this document without affecting the student’s Team List. If a Staff name is added to this document, the name will display on this document only and not on the student’s Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Staff			Add
Line	Staff Name	Role	
1	Green, Tom	Case Carrier	
2	User, Admin	Teacher Specialist	

Figure 2-6 Staff Section Change/Add

Change current staff names:

- Click ← next to the Staff Name to change. The Find: Staff screen displays.
- Enter all or part of staff **Last Name, First Name**.
- Click  or press **ENTER**. Search Results displays a list of matching criteria.
- Click line of staff name. Line highlights.

Find
Close
Select
Clear Selection

### Find: Staff

**Find Criteria**

Last Name	First Name	Middle Name
Smith	C	

**Search Results**

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-7 Find: Staff Screen

- Click again or click . Find: Staff screen closes and staff name displays.
- Click the **Role** dropdown and select the staff role.

Add staff names:

- Click **Add** on the Staff bar. A new line is added to the grid.
- Repeat the procedure above.

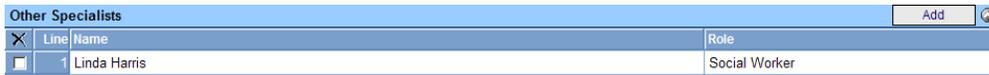
Staff			Role
Line	Staff Name	Role	
1	Green, Tom	Case Carrier	Physical Therapist
2	User, Admin	Teacher Specialist	Psychologist
3	Smith, John		Reader
			School Nurse

Figure 2-8 Staff Section Select Role

3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Specialists section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** button on the Other Specialists bar. A new row will be added.
2. Enter the **Name** and **Role** of the specialist.



Line	Name	Role
1	Linda Harris	Social Worker

Figure 2-9 Conference Summary Other Specialists

3. If needed, check  on the line of the staff name to remove. The row is removed.
4. Enter **Topics Discussed** and **Other Information** in the textboxes box provided. Use  to spellcheck. Use  for more space.

## RECOMMENDATIONS TAB

To add a recommendation:

1. Click the **Add** button under the Recommendations Made section. A new row displays.

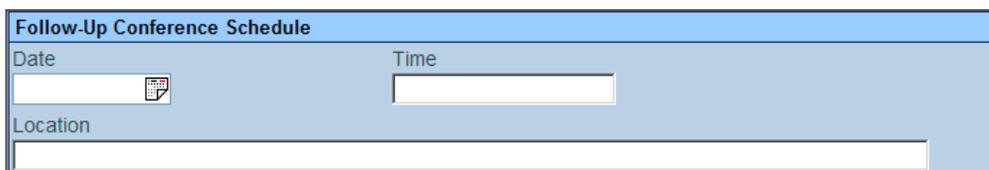


Line	Serial No.	Description
1		

Figure 2-10 Conference Summary Recommendations

2. Enter the **Serial Number** for the recommendation.
3. Describe recommendation in the textbox provided. Use  to spellcheck. Use  for more space.

To add a follow-up conference schedule:



Follow-Up Conference Schedule	
Date	Time
<input type="text"/>	<input type="text"/>
Location	
<input type="text"/>	

Figure 2-11 Conference Summary Follow-Up

1. Enter Follow-Up Conference **Date** (MMDDYY) or click  and select date.
2. Enter Follow-Up Conference **Time** (HHMM - 0800 for 8:00 AM, 0120 for 1:20 PM, etc.).
3. Enter Follow-Up Conference **Location**.

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 32 – CONSULTATION REQUEST

The Consultation Request contains two tabs:

- **Request for Consultation**
- **Parent Permission**

**Consultation Request**

Student Name: **Tacho, Katherine A.** Document: **GENAZ 32** Description: **Consultation Request**

**Request for Consultation** | Parent Permission

Document Name  
Consultation Request

Document Date

**Request for Consultation**

Date of Request | Best Time to Observe

School/Room Number

Person Requesting Consultation

Position of Person Requesting Consultation | Telephone | Date Received

Reason for Requesting a Consultation (specific educational concerns)

Parent Permission for Appraisal and Handling

Date

This portion to be completed by staff member receiving request for consultation

Figure 2-12 Consultation Request Screen

To create a Consultation Request document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. Enter **Date of Request** (MMDDYY) or click and select date.
3. Enter Best Time to Observe, School/Room Number, Person Requesting Consultation, Position of Person Requesting Consultation and Telephone number.
4. Enter **Date Received** (MMDDYY) or click and select date. This is the date the consultant received the request.
5. Describe the **Reason for Requesting Consultation**. Use to spellcheck. Use for more space.
6. Check Parent Permission for Appraisal and Handling if it has been given.
7. Enter **Date of Parent Permission** (MMDDYY) or click and select date.
8. Click **Save** if finished or proceed below.
9. Click on the title bar to view the next section, if necessary.

This portion to be completed by staff member receiving request

The screenshot shows a form titled "This portion to be completed by staff member receiving request for consultation". The form contains the following fields and controls:

- Observation/Consultation Date:** A text input field with a calendar icon.
- Time Spent on Consultation:** A text input field.
- Location/Setting:** A text input field.
- Observation/Consultation Data:** A large text area with a spellcheck icon and a scroll arrow.
- Summary of Suggestions Made or Demonstrated:** A large text area with a spellcheck icon and a scroll arrow.
- Consultant:** A text input field.
- Position:** A text input field.
- Copies:** A group of checkboxes:
  - Teacher
  - Service Provider
  - Regional Director
  - Other
- Other:** A text input field next to the "Other" checkbox.

Figure 2-13 Consultation Request Screen Consultation Observations

10. Enter **Observation/Consultation Date** (MMDDYY) or click and select date.
11. Enter Time Spent on Consultation and Location/Setting.
12. Describe Observation/Consultation Data and Summary of Suggestions Made or Demonstrated. Use to spellcheck. Use for more space.
13. Enter your name in **Consultant**.
14. Enter your **Position** title.
15. Check **Copies** distributed.
16. Check **Other** and specify whom in the textbox if copy will be distributed to someone else.

**PARENT PERMISSION TAB**

Add Referring Teacher

1. Click ← next to **Referring Teacher**. The Find: Staff screen displays.

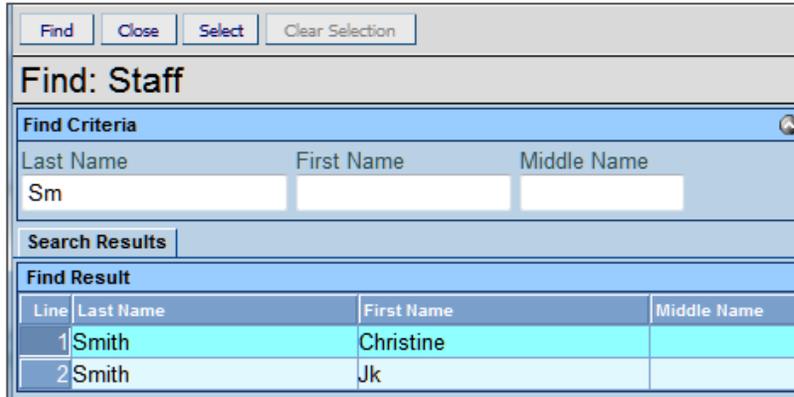


Figure 2-14 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press ENTER. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and referring teacher name displays.



Figure 2-15 Consultation Request Screen Assessments/Methods

1. Click the **Add** button on The following assessments/methods may be utilized to appraise skill levels grid:. A new line displays.
2. Enter the **Description** of the assessment or method. Use  to spellcheck. Use  for more space.
3. If needed, check  on the line of assessment/method description to remove.
4. List any Medical Concerns, Special Handling Considerations and Service Provider and



Figure 2-16 Consultation Request Screen Concerns and Special Handling

Positions. Use  to spellcheck. Use  for more space.

5. Enter **Parent Signature Date** (MMDDYY) or click  and select date.
6. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 33 – CONSULTATION REQUEST – PRESCHOOL

The Consultation Request - Preschool contains two tabs:

- **Reason for Request**
- **Background**

Figure 2-17 Consultation Request Preschool Screen

To create a Consultation Request - Preschool document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. Check Student's Current Identification, if applicable.
3. Check the appropriate area under What Direct Services does the Student Receive.
4. Enter any **Other** service or identification that may apply.
5. In **Referred By**, enter the name of the referring person.
6. Describe the **Reason for Referral** and **Student Strengths**. Use to spellcheck. Use for more space.

Overall Skills Please mark each statement Yes or No and add any relevant comments. Respond to each statement as it pertains to grade level expectations.

Communication		Yes/No
Line		
1	Attends/listens in a group setting	
2	Appears to understand questions, and/or stories	
3	Uses correct sentence structure and grammar in oral communication	
4	Expresses ideas in a clear and organized fashion	
5	Can hold a conversation with a peer	
6	Can hold a conversation with an adult	
7	Uses appropriate social communication (eye contact, etc)	
8	Has articulation difficulties (does not use correct speech sounds)	
9	Speech is generally unintelligible	
10	Stutters	
11	Speaks with stereotyped/echolalic language	
12	Uses sentences of 4 or more words	
13	Uses at least 100 + recognizable words on regular basis	
14	Can follow 1-step direction	
15	Can follow 2-step related direction	
16	Can follow 2-step unrelated direction	
Other		

Figure 2-18 Consultation Request Preschool Screen Overall Skills

7. Select **Yes** or **No** in each of the Overall Skills group boxes: Communication, Adaptive, Motor, and Personal/Social. An **Other** textbox is available in each section for additional skills.

**BACKGROUND TAB**

The student’s attendance history imports from Synergy SIS. This history will only display attendance from the current school district.

Attendance History					
Line	Year	Grade	School Location	Absences	Significant Information
1	2009	12	Hope High School	3	

Figure 2-19 Consultation Request Preschool Screen Background Tab Attendance History

1. **Significant Information** may be added. Use  to spellcheck. Use  for more space. If additional school years need to be added:

Attendance History					
Line	Year	Grade	School Location	Absences	Significant Information
1	2009	12	Hope High School	3	
2					

Figure 2-20 Consultation Request Preschool Screen Background Tab New Attendance History

2. Click the **Add** button to display a new row.
3. Enter the school **Year**, **Grade**, **School Location** and **Absences** in the spaces provided. **Significant Information** can also be added to this row.
4. If needed, check  on line of record to delete. The row will be removed.

**Cultural Factors**

There is no evidence of lack of instruction in reading and math (including excessive absences and/or frequent moves).

There is no evidence that race, limited English proficiency, or socio-economic status have contributed to the student's learning difficulties.

The following cultural factors (race, limited English proficiency, or socio-economic status) may have impacted the student's academic progress:

Please describe any cultural factors which may affect student's achievement and behavior

Performance in Special and General Education

Figure 2-21 Consultation Request Preschool Screen Background Tab Cultural Factors

1. Check the **Cultural Factors** statements that apply.
2. Describe any cultural factors which may affect student's achievement and behavior.
3. Describe Performance in Special and General Education. Click to spell check. Click for additional space.

Vision and Hearing results for the student will import from Synergy SIS, however, existing results can be edited or new results can be added to the Health view.

1. Click the **Add** button on the Vision Results bar. A new row displays.
2. Enter the **Screen Date** (MMDDYY) or click and select date.
3. Click the drop-downs box and select **Right Eye**, **Left Eye** and **Both Eyes** results.
4. Click the **Add** button on the Hearing Results bar. A new row displays.
5. Enter the **Screen Date** (MMDDYY) or click and select date.

Medical						
Vision Results						
Line	Screen Date	Right Eye	Left Eye	Both Eyes	Results	
1	05/12/2010	20/30	20/40	20/30		

Hearing Results						
Line	Screen Date	Right Result	Left Result	Results		
1	05/12/2010	P	P			

Figure 2-22 Consultation Request Preschool Screen Background Tab Medical

6. Click the drop-downs box and select **Right**, and **Left Results**.
7. If needed, check on line of record to delete. The row will be removed.
8. Add any **Health Issues** and **Medications** in the textboxes provided. Use to spellcheck. Use for more space.

Health Issues

Medications

Figure 2-23 Consultation Request Preschool Screen Background Tab Health Issues

9. Click

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 34 – FUNCTIONAL BEHAVIOR ASSESSMENT PLAN

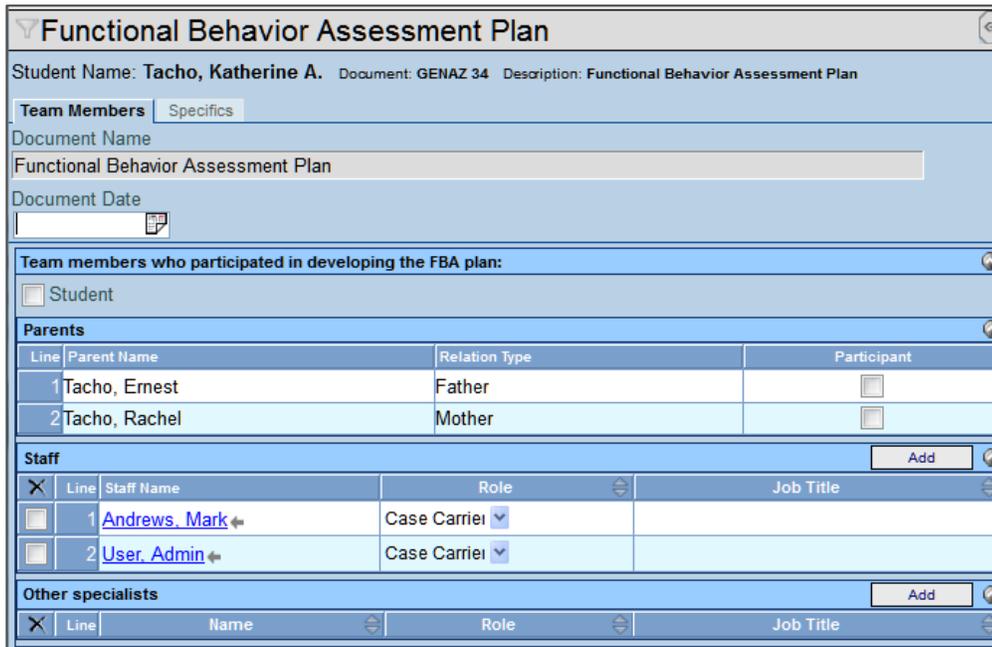
The Functional Behavior Assessment Plan works in conjunction with the GENAZ 99 -Behavior Intervention Plan.



**Note:** The Target Behavior listed in the Specifics tab will import into the GENAZ 99 – Behavior Intervention Plan (BIP).

The Functional Behavior Assessment Plan contains two tabs:

- **Team Members**
- **Specifics**



Line	Parent Name	Relation Type	Participant
1	Tacho, Ernest	Father	<input type="checkbox"/>
2	Tacho, Rachel	Mother	<input type="checkbox"/>

Line	Staff Name	Role	Job Title
1	Andrews, Mark	Case Carrier	
2	User, Admin	Case Carrier	

Figure 2-24 Functional Behavior Assessment Plan

To create a Functional Behavior Assessment Plan document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Check **Student** to include the student's name, with a signature line, as a participant in the Functional Behavior Assessment Plan. If the checkbox is left blank the name will not be included as a participant.
3. On the Parents section, check **Participant**, to include each parent name, with a signature line, as a participant in the Functional Behavior Assessment Plan. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student’s Team List. Names can be added or removed from the staff section of this document without affecting the student’s Team List. If a Staff name is added to this document, the name will display on this document only and not on the student’s Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Change current staff names:

Staff				Add
Line	Staff Name	Role	Job Title	
1	Andrews, Mark	Case Carrier	Teacher	
2	User Admin	Administrato	Hope HS Principal	

Figure 2-25 Functional Behavior Assessment Plan Staff Section Change/Add

1. Click  next to the Staff Name to change. The Find: Staff screen displays.
2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.

Find: Staff			
Find Criteria			
Last Name	First Name	Middle Name	
Smith	C		
Search Results			
Find Result			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-26 Find: Staff Screen

5. Click again or click . Find: Staff screen closes and staff name displays.
6. Click the **Role** drop-down and select the staff role.
7. Enter the staff member's **Job Title**.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.

Staff				Orient./Mobility Specialist
Line	Staff Name	Role	Job Title	
1	Green, Tom	Case Carrier		Other
2	User Admin	Teacher Specialist		Physical Therapist
3	Smith, John			Psychologist
				Reader
				School Nurse

Figure 2-27 Functional Behavior Assessment Plan Staff Section Select Role

3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Specialists section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** button on the Other Specialists bar. A new row will be added.
2. Enter the **Name, Role** and **Job Title** of the specialist.

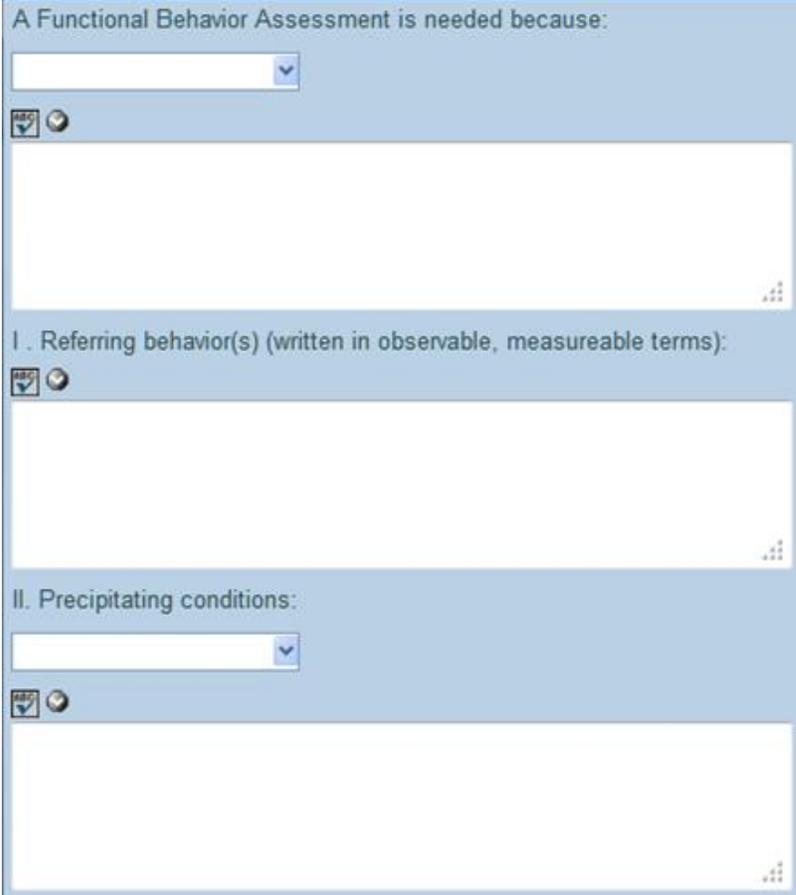
Other specialists				Add
Line	Name	Role	Job Title	
1	Dr. Arthur Rand	Family Advocate	Private Psychologist	

Figure 2-28 Functional Behavior Assessment Plan Other Specialists

3. If needed, check  on the line of the name to remove. The row is removed.

**SPECIFICS TAB**

1. Click the drop-down under the words, **A Functional Behavior Assessment is needed because:**, and select the appropriate reason from the list. The selection will populate the box below. This text may be edited. Use  to spellcheck. Use  for more space.
2. Enter Referring behavior(s) (written in observable, measurable terms). Use  to spellcheck. Use  for more space.
3. Click the drop-down under the words, **Precipitating conditions:**, and select the appropriate reason from the list. The selection will populate the box below. This text may be edited. Use  to spellcheck. Use  for more space.

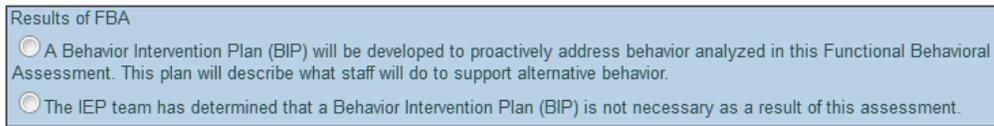


The screenshot shows a web-based form titled "Functional Behavior Assessment Plan Specifics Tab". It is organized into three distinct sections, each with a light blue header and a white content area. The first section, "A Functional Behavior Assessment is needed because:", features a drop-down menu, a small icon with "ABC" and a magnifying glass, and a large text box. The second section, "I. Referring behavior(s) (written in observable, measurable terms):", also includes a drop-down menu, the same "ABC" icon, and a large text box. The third section, "II. Precipitating conditions:", follows the same layout with a drop-down menu, the "ABC" icon, and a large text box. The form is enclosed in a light blue border.

Figure 2-29 Functional Behavior Assessment Plan Specifics Tab

4. Repeat the above instructions for Baseline data included: and Frequency of behavior:.
5. Click the **Intensity of behavior:** drop-down and select the appropriate level of the behavior.
6. Enter the **Student Strengths**. Use  to spellcheck. Use  for more space
7. Click the **Environment(s)** in which referring behavior(s) are LEAST likely to occur (i.e. location, person(s), and time of day) drop-down and select from the list. The selection will populate the box below. This text may be edited. Use  to spellcheck. Use  for more space.
8. Enter any additional **Comments**. Use  to spellcheck. Use  for more space.
9. Enter **Target** behavior (a desired behavior to be increased) written in observable/measurable terms. Use  to spellcheck. Use  for more space.

10. Under the **Results of FBA**, select either:



Results of FBA

A Behavior Intervention Plan (BIP) will be developed to proactively address behavior analyzed in this Functional Behavioral Assessment. This plan will describe what staff will do to support alternative behavior.

The IEP team has determined that a Behavior Intervention Plan (BIP) is not necessary as a result of this assessment.

Figure 2-30 Functional Behavior Assessment Plan Results of FBA

**A Behavior Intervention Plan (BIP) will be developed to proactively address behavior analyzed in this Functional Behavioral Assessment. This plan will describe what staff will do to support alternative behavior.**

**OR**

**The IEP team has determined that a Behavior Intervention Plan (BIP) is not necessary as a result of this assessment.**

11. Enter the **Rationale** for the decision. Use  to spellcheck. Use  for more space.

12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 37 – MANIFESTATION DETERMINATION AND REVIEW

The Manifestation Determination and Review contains one tab:

- **Manifestation Determination**

Figure 2-31 Manifestation Determination and Review

To create a Manifestation Determination and Review document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. Enter the **Location** of the Manifestation Determination and Review.
3. Enter the **Time** (HHMM - 0800 for 8:00 AM, 0120 for 1:20 PM, etc.)
4. Enter the student's **Special Education Placement(s)**. Use to spellcheck. Use for more space.
5. Enter the **Date of Current IEP**, **Reevaluation Due Date** and **Date** this incident of misconduct occurred (MMDDYY) or click and select date.
6. Enter **Total number of suspension days this school year prior to this incident** and **Number of suspension days being considered for this incident of misconduct**.

Suspension Criteria		
Line	Description	Selection
1	Illegal drugs/controlled substances were involved in the incident.	No
2	A weapon/dangerous instrument was involved in this incident	
3	Serious bodily injury as defined in federal law was inflicted upon another person at school or at a school function.	No
4	Student transportation was involved in this incident.	

Figure 2-32 Manifestation Determination and Review Suspension Criteria

7. Using the **Yes/No** drop downs, select the appropriate response for **Suspension Criteria**.
8. Check **Student** to include the student's name, with a signature line, as a participant in the Functional Behavior Assessment Plan. If the checkbox is left blank the name will not be included as a participant.

- On the Parents section, check **Participant**, to include each parent name, with a signature line, as a participant in the Functional Behavior Assessment Plan. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Change current staff names:

Line	Staff Name	Role	Job Title
1	Andrews, Mark	Case Carrier	Teacher
2	User_Admin	Administrato	Hope HS Principal

Figure 2-33 Manifestation Determination and Review Staff Section Change/Add

- Click next to the Staff Name to change. The Find: Staff screen displays.
- Enter all or part of staff **Last Name, First Name**.
- Click or press **ENTER**. Search Results displays a list of matching criteria.
- Click line of staff name. Line highlights.
- Click again or click . Find: Staff screen closes and staff name displays.

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-34 Find: Staff Screen

- Click the **Role** drop-down and select the staff role.
- Enter the staff member's **Job Title**.

Add staff names:

- Click **Add** on the Staff bar. A new line is added to the grid.
- Repeat the procedure above.

Line	Staff Name	Role	Job Title
1	Green, Tom	Case Carrier	Physical Therapist
2	User_Admin	Teacher Specialist	Psychologist
3	Smith, John		

Figure 2-35 Manifestation Determination and Review Staff Section Select Role

- If needed, check on the line of the staff name to remove. The row is removed.

The Other Specialists section will allow for participant names that are not available in the Staff directory.

- Click the **Add** button on the Other Specialists bar. A new row will be added.

2. Enter the **Name**, **Role** and **Job Title** of the specialist.

Other specialists			
Line	Name	Role	Job Title
1	Dr. Arthur Rand	Family Advocate	Private Psychologist

Figure 2-36 Manifestation Determination and Review Other Specialists

3. If needed, check  on the line of the name to remove. The row is removed.

Nature of offense(s) alleged against the student and information related to allegations that were considered by team (i.e. witness statements, police report):

Figure 2-37 Manifestation Determination and Review Nature of Offense

4. Describe the Nature of offense(s) alleged against the student and information related to allegations that were considered by team in the textbox provided. Use  to spellcheck. Use  for more space.

**Part 3. The Team Members Reviewed and Considered the Following Relevant Information**

check all that apply

- Current evaluation & diagnostic results
- Observation of the student
- Triennial psychoeducational reevaluation
- Disciplinary results
- Information provided by parents
- Current academic results
- Current IEP & placement
- Attendance records
- School staff reports

**Other Information**

Line	Other Information
1	<input type="text"/>

The conduct subject to disciplinary action is a manifestation of the student's disability.

Figure 2-38 Manifestation Determination and Review Part 3

5. Check all reviewed and considered relevant information that applies.
6. Click **Add** on the Other Information bar to list additional items that were reviewed and considered. A new line is added. Additional lines may be added by clicking **Add** again.
7. Select the appropriate **conduct subject to disciplinary action** statement from the drop down selection.

Part 4. The Team Members' Conclusions		
Conclusions		
Line	Description	Selection
1	A reevaluation is necessary.	▼
2	It is necessary to review the current behavior plan for this student.	▼
3	The IEP team determined this incident of misconduct is not a manifestation of the student's disability.	▼
4	Conduct was caused by or had a direct and substantial relationship to the student's disability.	▼
5	Conduct was a direct result of the district's failure to implement the IEP.	▼
6	The student will be returned to the placement from which the student was removed.	▼
7	The Parent and District agree to a change of placement as part of the behavioral intervention plan.	▼
8	An IEP meeting is needed.	▼
9	Student will be placed in an interim alternative educational setting determined by the IEP team.	▼
10	It is necessary to conduct a Functional Behavioral Assessment.	▼

Comments  

Procedural Safeguards
Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.
Procedural Safeguards provided to parent(s)
Proc Safeguard Initials (initials)
<input type="text"/>

Figure 2-39 Manifestation Determination and Review Part 4

8. Using the **Yes/No** drop downs, answer each question in the **Conclusions** group box.
9. Add any additional **Comments**. Use  to spellcheck. Use  for more space.
10. Initial in the **Procedural Safeguards** textbox to indicate that procedural safeguards were provided to parent.

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 38 – MEETING REQUEST

The Meeting Request contains two tabs:

- Meeting Participants
- Parent Rights

Meeting Request

Student Name: **Abernathy, Donna A.** Document: GENAZ 38 Description: Meeting Request

Meeting Participants | Parent Rights

Document Name  
Meeting Request

Document Date  
[Date Picker]

Meeting Participants

Dear Parents/Guardians:  
THIS IS MY NEW MEETING MESSAGE.  
If you would like to review the records prior Staff Name [Red Box] to the meeting, please contact [Text Box]

The purpose of the meeting:

To discuss the data gathered in the evaluation for special education services of your child and make a determination regarding eligibility  
 To develop an IEP  
 To review and revise your child's IEP

Other: [Text Box]

The following are invited to attend and participate in the meeting:

Student

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Participant
1	Abernathy, Joan	Mother	Yes	Yes	<input type="checkbox"/>
2	Abernathy, Philip	Father	No	No	<input type="checkbox"/>

Staff [Add]

Line	Staff Name	Role
1	User Admin	Case Carrier

Figure 2-40 Ad Hoc Meeting Request

### MEETING PARTICIPANTS TAB

To create a Meeting Request document:

1. Enter the **Document Date** (MMDDYY) or click [Date Picker] and select date. This should reflect the date the document was created.
2. Click on [Red Arrow] next to **Staff Name** (see above) to enter the contact name for the parent. The Find: Staff screen displays.

Find Close Select Clear Selection

Find: Staff

Find Criteria

Last Name First Name Middle Name  
 Smith C

Search Results

Find Result

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-41 Find: Staff Screen

3. Enter all or part of staff **Last Name, First Name**.
4. Click  or press **ENTER**. Search Results displays a list of matching criteria.
5. Click line of staff name. Line highlights.
6. Click again or click . Find: Staff screen closes and staff name displays.
7. Check **The Purpose of the meeting** or check **Other** and enter another purpose.

The purpose of the meeting:

To discuss the data gathered in the evaluation for special education services of your child and make a determination regarding eligibility

To develop an IEP

To review and revise your child's IEP

Other:

Figure 2-42 Meeting Request Check Purpose

1. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.

Parent(s)/Guardian(s)					
Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Participant
1	Kelly, Louise	Mother	Yes	Yes	<input checked="" type="checkbox"/>
2	Wilkinson, Samuel	Step-Father	Yes	Yes	<input type="checkbox"/>
3	Smith, Brian	Father	No	No	<input type="checkbox"/>

Figure 2-43 Meeting Request Parent(s)/Guardian(s) Check Parent

2. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Staff			Add
Line	Staff Name	Role	
1	Green, Tom	Case Carrier	
2	User, Admin	Teacher Specialist	

Figure 2-44 Meeting Request Staff Section Change/Add

Change current staff names:

1. Click  next to the Staff Name to change. The Find: Staff screen displays.

**Find: Staff**

**Find Criteria**

Last Name:  First Name:  Middle Name:

**Search Results**

**Find Result**

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-45 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.

- Click again or click . Find: Staff screen closes and staff name displays.

Staff			Orient./Mobility Specialist
Line	Staff Name	Role	Other
1	Green, Tom	Case Carrier	Physical Therapist
2	User, Admin	Teacher Specialist	Psychologist
3	Smith, John		Reader
			School Nurse

Figure 2-46 Meeting Request Staff Section Select Role

- Click the **Role** dropdown and select the staff role.

Add staff names:

- Click **Add** on the Staff bar. A new line is added to the grid.
- Repeat the procedure above.
- If needed, check  on the line of the staff name to remove. The row is removed.

The Other Specialists section will allow for participant names that are not available in the Staff directory.

- Click the **Add** button on the Other Specialists bar. A new row will be added.
- Enter the **Name** and **Role** of the specialist.

Other Specialists		Add
Line	Name	Role
1	Linda Harris	Social Worker

Figure 2-47 Meeting Request Other Specialists

- If needed, check  on the line of the staff name to remove. The row is removed.
- Enter Meeting Information in the textboxes provided.

We would like to schedule a meeting with you at:

Location, Building, Room  
 Hope High School, Room 302

Meeting Date: 08/26/2010 Meeting Time: 3:30 PM

This meeting was confirmed by phone on: 07/21/2010 This meeting was confirmed by: Sally Secretary

Comments

If you need to change the date and/or time of the meeting, please call  
 Sally Secretary  
 at  
 800-555-1234

Interpreter Needed  
 Procedural Safeguards Enclosed

Figure 2-48 Meeting Request Information

- Click .

## PARENT RIGHTS TAB

The Parent Rights tab is for the parent to manually update when they receive the printed hard copy of the completed Meeting Request. This area is editable and can be completed for the parent or left blank for the parent to complete.

*Editable Version:*

Parent Rights	
A parent has the Right to participate in all meetings regarding Identification, Evaluation, Placement, and Free Appropriate Education (FAPE) for their child. A parent has the Right to advance notice (approximately 10 days) for scheduled meetings on their child.	
Please check the following, if applicable:	
<input type="checkbox"/>	I do not require a 10 day advance notice for the proposed meeting.
<input checked="" type="checkbox"/>	I plan to attend this meeting.
<input type="checkbox"/>	I do not plan to attend the proposed meeting, but am requesting an alternate meeting time.
<input type="checkbox"/>	I do not plan to participate. Please meet and inform me of the outcome.
<input type="checkbox"/>	Phone conference is requested.
<input type="checkbox"/>	I need a copy of the Release of Student Records form and plan to bring
	<input type="text"/> to the meeting
	whose position is <input type="text"/>
<input type="checkbox"/>	I grant my consent for the individual(s) listed in the Other Specialists section of this document to attend this meeting.

Figure 2-49 Parents Rights Tab View

*Printable Version (This is what the parent will see).*

Parent Rights	
A parent has the Right to participate in all meetings regarding Identification, Evaluation, Placement, and Free Appropriate Education (FAPE) for their child. A parent has the Right to advance notice (approximately 10 days) for scheduled meetings on their child.	
Please check the following, if applicable:	
<input type="checkbox"/>	I do not require a 10 day advance notice for the proposed meeting.
<input checked="" type="checkbox"/>	I plan to attend this meeting.
<input type="checkbox"/>	I do not plan to attend at the proposed time, but am requesting an alternate meeting time.
<input type="checkbox"/>	I do not plan to participate. Please meet and inform me of the outcome.
<input type="checkbox"/>	Phone conference is requested.
<input type="checkbox"/>	I need a copy of the Release of Student Records form and plan to bring
	<input type="text"/> to the meeting,
	whose position is <input type="text"/>
Parent Signature: _____	Date: _____

Figure 2-50 Parents Rights Printable View

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 39 – MORE RESTRICTIVE PLACEMENT REFERRAL

The More Restrictive Placement Referral contains four tabs:

- **Demographics**
- **Background**
- **Behavior**
- **Attachments**

**ReferralRestrictivePlacement**

Student Name: **Aaron, Harold N.** Document: **GENAZ 39** Description: **More Restrictive Placement Referral**

Demographics | Background | Behavior | Attachments

Document Name: **More Restrictive Placement Referral** Document Date:

Student Is Participant:

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Participant
1	Daugherty, Diane	Mother	Yes	Yes	<input type="checkbox"/>
2	Daugherty, Howard	Step-Father	Yes	Yes	<input type="checkbox"/>
3	Mucha, Victor	Father	No	No	<input type="checkbox"/>

Line	Staff Name	Role
1	Griess, Brian	Case Carrier

Line	Name	Job Title
------	------	-----------

Figure 2-51 More Restrictive Placement Referral

To create a More Restrictive Placement Referral document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.

### DEMOGRAPHICS TAB

2. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Participant
1	Daugherty, Diane	Mother	Yes	Yes	<input type="checkbox"/>
2	Daugherty, Howard	Step-Father	Yes	Yes	<input type="checkbox"/>
3	Mucha, Victor	Father	No	No	<input type="checkbox"/>

Figure 2-53 More Restrictive Placement Referral Parent Participants

3. On the Parent Participant section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

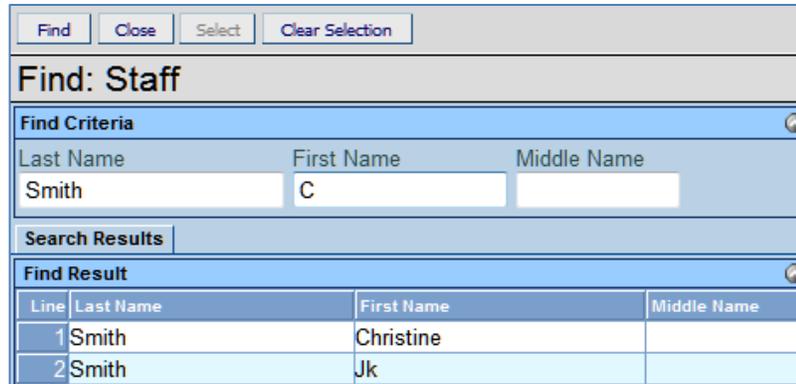
Line	Staff Name	Role
1	Griess, Brian	Case Carrier

Figure 2-52 More Restrictive Placement Referral Staff Participants

The Staff Participants section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff names displaying will be included as participants, however changes may be made including additional staff names added.

Change current staff names:

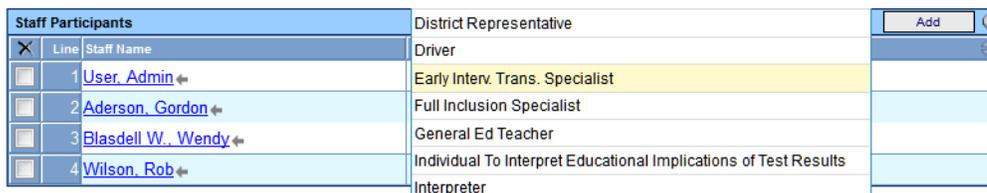
1. Click  next to the Staff Name to change. The Find: Staff screen displays.



Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-54 Find: Staff Screen

2. Enter all or part of staff Last Name, First Name.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.



Line	Staff Name	Role
<input type="checkbox"/>	1 <a href="#">User Admin</a>	District Representative
<input type="checkbox"/>	2 <a href="#">Aderson, Gordon</a>	Driver
<input type="checkbox"/>	3 <a href="#">Blasdel W., Wendy</a>	Early Interv. Trans. Specialist
<input type="checkbox"/>	4 <a href="#">Wilson, Rob</a>	Full Inclusion Specialist
		General Ed Teacher
		Individual To Interpret Educational Implications of Test Results
		Interpreter

Figure 2-55 More Restrictive Placement/Referral Staff Participation Select Role

6. Click the **Role** dropdown and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** button. A new row will be added.
2. Enter the participant's **Name** and **Job Title**.
3. If needed, check  on the line of the record to remove. The row is removed.

**BACKGROUND TAB**

**ReferralRestrictivePlacement**

Student Name: \_\_\_\_\_ Document: GENAZ 39 Description: More Restrictive Placement Referral

Demographics **Background** Behavior Attachments

Document Name  
More Restrictive Placement Referral

Document Date  
\_\_\_\_\_

**1. Reason for Referral to more Restrictive Placement**

Reason for Referral  

\_\_\_\_\_

**2. Attendance**

Is student attending school now? _____	How many unexcused absences have there been this school year? _____
How many days has the student attended this school year? _____	How many days has the student been suspended this IEP year? _____
How many excused absences have there been this school year? _____	How many days has the student been sent home? _____

**3. Placement**

How long has he/she been in a Special Education Program?  
\_\_\_\_\_ months \_\_\_\_\_ years

How many periods per day does the student spend in a Special Education class? \_\_\_\_\_ per day

What is the date of the most recent MET? \_\_\_\_\_

What types of additional services (OT, CD, etc.) does this student's IEP provide?  
\_\_\_\_\_

**4. Family/Home**

Have parents exhibited control of student? _____	Does the student have other behavior problems in the home? _____
Are parents capable of controlling student? _____	If divorced, how many interactions does the non-custodial parent have? _____
Have all parental figures supported the Special Education program? _____	Has there been a recent change in the student's environment (i.e., death of family member or fiend, divorce, new sibling, etc.)? _____

Figure 2-56 More Restrictive Placement Referral Background Tab

1. Describe the **Reason for Referral**. Use  to spellcheck. Use  for more space.

**Attendance**

2. Using the **Yes/No** drop down indicate if the student is attending school now.
3. Answer the attendance questions using a number format in the fields provided.

**Placement**

4. Specify how long the student has been in a Special Education Program and how many periods spent in a special education class using number format.
5. Enter the **date of the most recent MET** (MMDDYY) or click  and select date.
6. List the **types of additional services** indicated on the student's IEP.

**Family/Home**

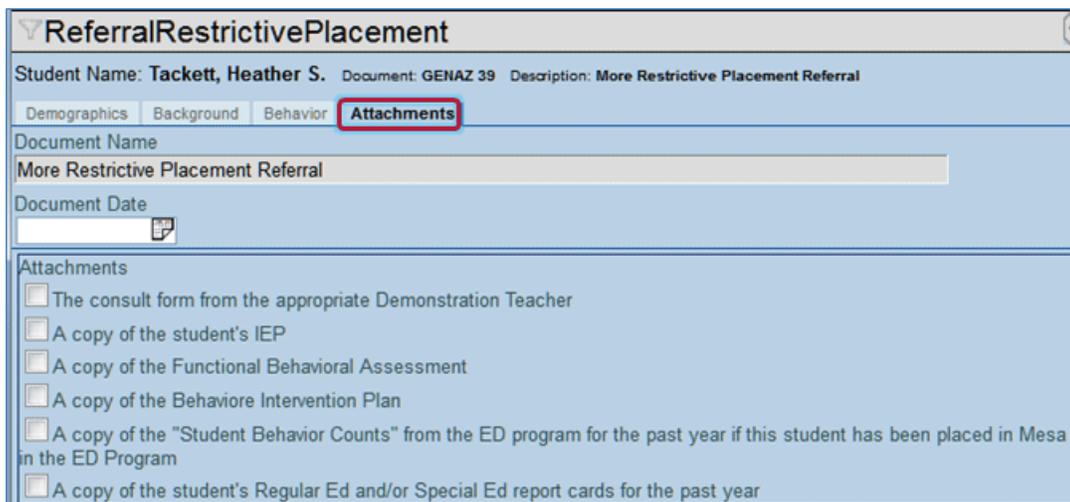
7. Using the **Yes/No** drop down list, answer the questions regarding the student's family and home.
8. Enter a numerical amount regarding the amount of **non-custodial interactions**.

## BEHAVIOR TAB

ReferralRestrictivePlacement	
Student Name: <b>Tackett, Heather S.</b> Document: <b>GENAZ 39</b> Description: <b>More Restrictive Placement Referral</b>	
Demographics Background <b>Behavior</b> Attachments	
Document Name	Document Date
More Restrictive Placement Referral	
<b>5. Behavior</b>	
Is student in control of inappropriate behaviors? <input type="text"/>	Is student aware of his/her problems and their source? <input type="text"/>
How long has the student been exposed to a continuum of consistently applied consequences? <input type="text"/>	
List positive consequences <input type="text"/>	List negative consequences <input type="text"/>
Is student disoriented? <input type="text"/>	Is there a history of drug/alcohol involvement? <input type="text"/>
Have behaviors regressed over a period of time? <input type="text"/>	Does the student have problems in all classes and areas at school? <input type="text"/>
<b>6. Community</b>	
Has this student had problems with the law? <input type="text"/>	Does the student have any friends? <input type="text"/>
Does the student have other problems in the community? <input type="text"/>	
<b>7. Interactions</b>	
List the people the student trusts and talks with. <input type="text"/>	How does the student function within his/her peer group? <input type="text"/>
How does the student deal with authority figures? <input type="text"/>	
<b>8. Medical</b>	
Does this student have any medical problems? <input type="text"/>	List any medications this student takes regularly. <input type="text"/>
<b>9. Educational Performance</b>	
What academic, social, or leisure time skills does this student display that are average or above? <input type="text"/>	What specific school behaviors are addressed on the Behavioral Intervention Plan? List: <input type="text"/>
<b>10. Functional Behavioral Assessment (FBA) &amp; Behavioral Intervention Plan (BIP)</b>	
When was the FBA completed? <input type="text"/>	How long has the behavioral intervention plan been attempted? <input type="text"/>
Is everyone who is intervening with this student following through with their portion of the behavioral plan? <input type="text"/>	What specifically are the types of interventions that are needed for this student that cannot be implemented at present campus? List: <input type="text"/>
Does the IEP reflect these special behavioral and instructional needs with goals and objective? <input type="text"/>	<input type="text"/>

Figure 2-57 More Restrictive Placement Referral Behavior Tab

1. Using the **Yes/No** drop down lists, answer the questions regarding the student's behavior.
2. Enter the amount of time the student has been exposed to a **continuum of consistently applied consequences?**
3. List **positive consequences** and **negative consequences** in the textboxes provided. Use  to spellcheck. Use  for more space.
4. Using the **Yes/No** drop down lists, answer the questions regarding the student's **Behavior**.
5. Using the **Yes/No** drop down lists, answer the questions regarding the student's **Community Relations**.
6. In the textboxes provided answer the questions regarding the student's **Interaction** with others. Use  to spellcheck. Use  for more space.
7. In the textboxes provided, answer the questions regarding the student's **Medical** issues. Use  to spellcheck. Use  for more space.
8. In the textboxes provided, answer the questions regarding the student's **Educational Performance**. Use  to spellcheck. Use  for more space.
9. Enter the date the **FBA** was **completed** (MMDDYY) or click  and select date.
10. List how long the behavioral intervention plan (BIP) has been attempted.
11. Using the Yes/No drop down list, answer whether everyone is following through with their portion of the behavior plan, and if the IEP reflects these special behavioral and instructional needs with goals and objectives.
12. List the types of interventions that are needed for this student that cannot be implemented at the present campus. Use  to spellcheck. Use  for more space.



**ReferralRestrictivePlacement**

Student Name: **Tackett, Heather S.** Document: GENAZ 39 Description: **More Restrictive Placement Referral**

Demographics Background Behavior **Attachments**

Document Name  
More Restrictive Placement Referral

Document Date

Attachments

- The consult form from the appropriate Demonstration Teacher
- A copy of the student's IEP
- A copy of the Functional Behavioral Assessment
- A copy of the Behaviore Intervention Plan
- A copy of the "Student Behavior Counts" from the ED program for the past year if this student has been placed in Mesa in the ED Program
- A copy of the student's Regular Ed and/or Special Ed report cards for the past year

### ATTACHMENTS TAB

Figure 2-58 More Restrictive Placement Referral AttachmentsTab

1. Use the checkboxes to select the appropriate copies that will accompany this document.
2. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 40 – PRIOR WRITTEN NOTICE

The (Ad Hoc) Prior Written Notice is a generic notice available for when a prior written notice is needed outside of process documents.

The Prior Written Notice contains one tab:

- **Prior Written Notice**

Figure 2-59 Ad Hoc Prior Written Notice

To create a Prior Written Notice document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. Next to the **Change Action To:** are a series of buttons. If the **Selected Action** is not the purpose of this Prior Written Notice, click one of the buttons to change the type.

Figure 2-60 Prior Written Notice Library Stem

Based on the **Selected Action**, the appropriate library stems will be available in the drop-down list under DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT.

3. Click the drop-down and select one of the options. Text may be added to the auto-populated statement or enter data directly into textbox. Use to spellcheck. Use for more space.

There are four standard **Statements** available. Since this is a generic Prior Written Notice document, there are no library stems to select from.

Figure 2-61 Prior Written Notice Library Stem

4. Enter data directly into textboxes. Use to spellcheck. Use for more space.

Figure 2-62 Prior Written Notice Implementation of Decision

5. Enter the date that **This decision is proposed to be implemented on:** (MMDDYY) or click and select date.
6. Enter **(initials)** if Procedural Safeguards have been provided to parent(s).

7. Click ← next to **This document was prepared by:**. The Find: Staff screen displays.

Find: Staff			
Find Criteria			
Last Name	First Name	Middle Name	
Smith	C		
Search Results			
Find Result			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-63 Find: Staff Screen

8. Enter all or part of staff **Last Name, First Name**.
9. Click  or press **ENTER**. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.
11. Click again or click . Find: Staff screen closes and staff name displays in gray box.
12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 41E – NOTICE OF REFUSAL OF EVALUATION

The Notice of Refusal of Evaluation contains one tab:



**Note:** The Notice of Refusal of Evaluation has been created from the Synergy SE Prior Written Notice template. The wording of examples may differ, as each district has the ability to create Prior Written Notices to meet their individual district needs

- **Prior Written Notice**

To create a Notice of Refusal of Evaluation document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.

The **Statements** section contains areas where descriptions and explanations for actions taken are entered. Drop down key-word stems may be available, based on individual district decisions. If no stems are available text can be added directly to the textboxes.

Figure 2-65 Prior Written Notice Refusal of Evaluation Statements

- Click the drop-down and select one of the options. Text may be added to the auto-populated statement enter data directly into textbox. Use  to spellcheck. Use  for more space.

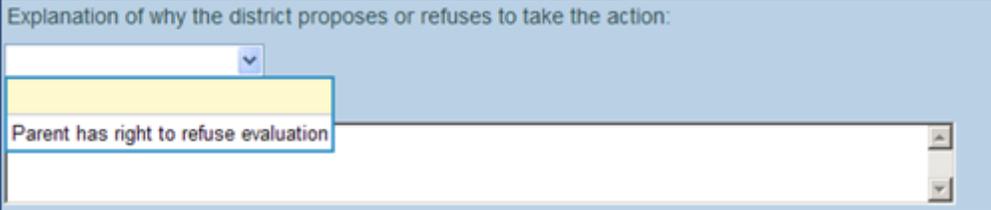


Figure 2-66 Library Stem Drop-Down

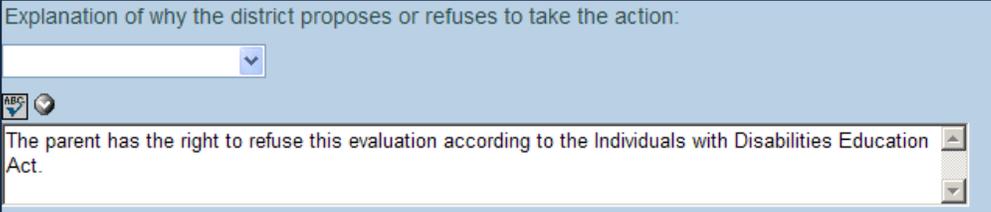


Figure 2-67 Library Stem Auto-Populated

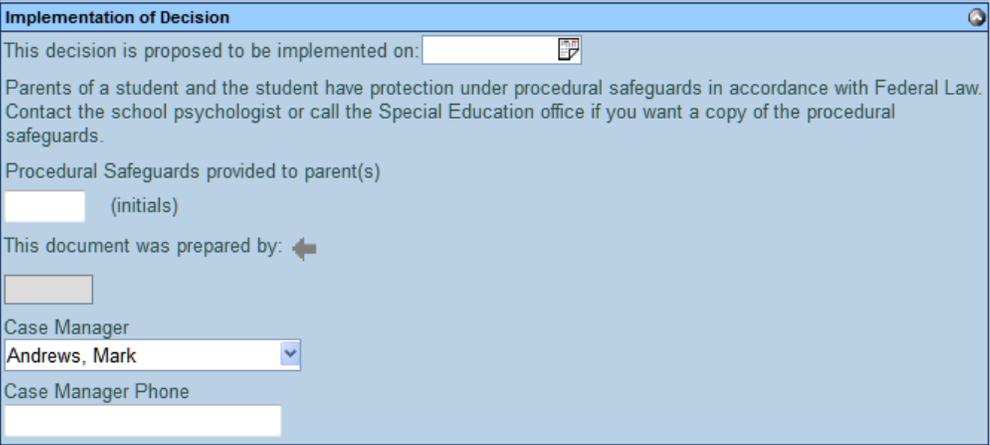


Figure 2-68 Prior Written Notice Implementation of Decision

- Enter the date that **This decision is proposed to be implemented on:** (MMDDYY) or click  and select date.
- Enter **(initials)** if Procedural Safeguards have been provided to parent(s).
- Click  next to **This document was prepared by:**. The Find: Staff screen displays.
- Enter all or part of staff **Last Name, First Name**.

- Click **Find** or press **ENTER**. Search Results displays a list of matching criteria.

Find: Staff			
Find Criteria			
Last Name	First Name	Middle Name	
Smith	C		
Search Results			
Find Result			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-69 Find: Staff Screen

- Click line of staff name. Line highlights.
- Click again or click **Select**. Find: Staff screen closes and staff name displays in gray box.
- Click **Save**.

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 41F – NOTICE OF REFUSAL OF FAPE

The Notice of Refusal of FAPE contains one tab:

- **Prior Written Notice**



**Note:** The Notice of Refusal of FAPE has been created from the Synergy SE Prior Written Notice template. Wording examples may differ, as each district has the ability to create Prior Written Notices to meet their individual district needs.

Figure 2-70 Notice of Refusal of FAPE Screen

To create a Notice of Refusal of FAPE document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.

The **Statements** section contains descriptions and explanations for actions taken. Drop down key-word stems may be available, based on individual district decisions.

Figure 2-71 Notice of Refusal of FAPE Screen Statements

2. Click the drop-down and select one of the options. Text may be added to the auto-populated statement enter data directly into textbox. Use  to spellcheck. Use  for more space.

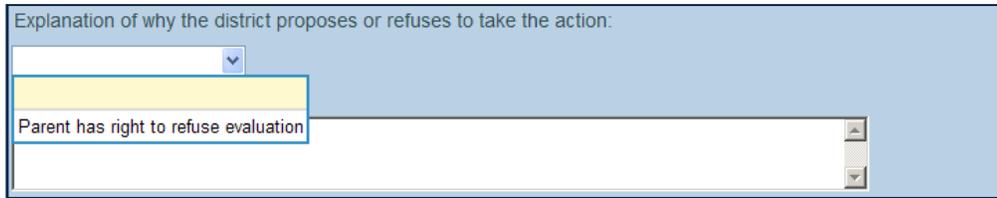


Figure 2-72 Notice of Refusal of FAPE Screen Library Stem Auto-Populated

3. Enter the date that **This decision is proposed to be implemented on:** (MMDDYY) or click  and select date.

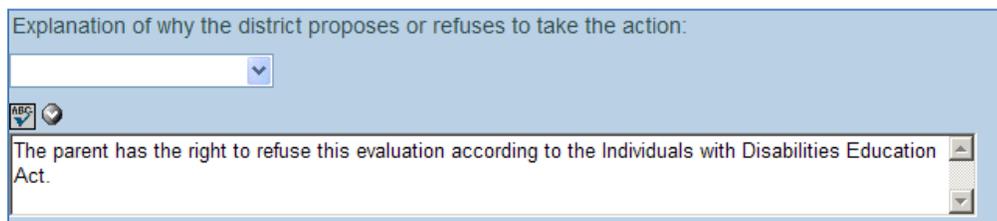


Figure 2-73 Notice of Refusal of FAPE Screen Library Stem Drop-Down

4. Enter **(initials)** if Procedural Safeguards have been provided to parent(s).

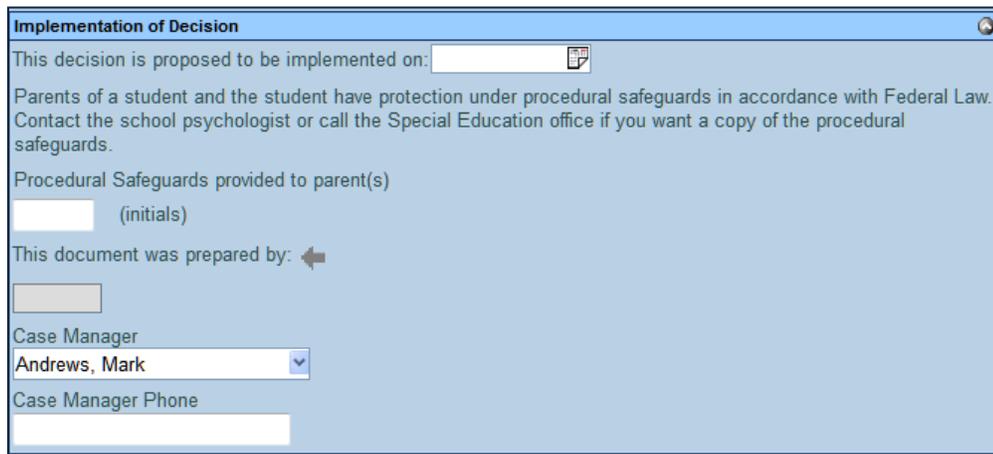


Figure 2-74 Notice of Refusal of FAPE Screen Implementation of Decision

5. Click ← next to This document was prepared by:. The Find: Staff screen displays.

Find	Close	Select	Clear Selection
<b>Find: Staff</b>			
<b>Find Criteria</b>			
Last Name	First Name	Middle Name	
Smith	C		
<b>Search Results</b>			
<b>Find Result</b>			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-75 Find: Staff Screen

6. Enter all or part of staff **Last Name, First Name**.
7. Click  or press **ENTER**. Search Results displays a list of matching criteria.
8. Click line of staff name. Line highlights.
9. Click again or click . Find: Staff screen closes and staff name displays in gray box.
10. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 42 – REQUEST FOR BILINGUAL TRANSCRIPTION

The Request for Bilingual Transcription contains one tab:

- **Documents Enclosed**

Figure 2-76 Request for Bilingual Transcription Screen

To create a Request for Bilingual Transcription document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. Check which documents are enclosed.
3. If **IEP** is enclosed, enter the date of the document (MMDDYY) or click and select date.
4. If **Time sensitive material needed by** is selected enter the due date (MMDDYY) or click and select date.
5. If **Forms** or **documents that don't need translation** are included describe them in the textbox provided.
6. Enter any Special Instructions.
7. Specify **Names** and **Locations** of persons receiving copies of this document in textboxes provided.

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 43 – SUMMARY OF PERFORMANCE

The Summary of Performance contains one tab:

- **Summary of Performance**

Figure 2-77 Summary of Performance Screen

To create a Summary of Performance document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.

In the Summary of Performance section:

2. Enter the Case Manager Initials.
3. Enter the **Date of Graduation/Exit** and **Most Recent IEP Date** (MMDDYY) or click and select date.
4. Enter the student's **Disability** and **Current School**.
5. Enter the name of the Person Completing Summary.

The **Post Secondary Goal(s)** and **Summary of Performance** sections are comprised of text fields. Each field has the spellcheck and for more space.

6. Add Post Secondary Goals including **Training, Education, Employment** and **Independent Living Skills**, where appropriate, in areas provided.
7. Summarize the student's Academic Achievement, Functional Performance, Test and Classroom Accommodations in areas provided.

The final section is for recommendations to assist the student in meeting their postsecondary goals.

Line	Title Code
1	Training
2	Education
3	Employment

Figure 2-78 Summary of Performance Screen Recommendations

To add a goal:

8. Click the line number of the area desired. Then click **Show Detail**.

OR

Double click the line number of the desired area.

The detailed view displays on the right side of the screen.

9. Click the **Add** button. A new line is added below.

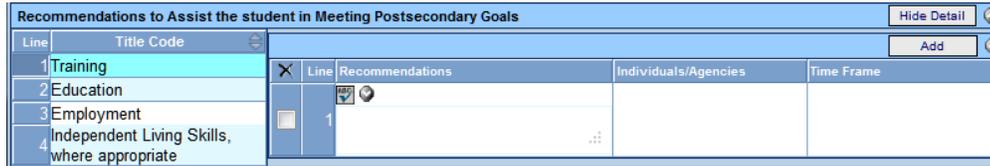


Figure 2-79 Summary of Performance Screen Detailed View

10. Enter the Recommendations, Individuals/Agencies and Time Frame in the textboxes provided.

11. Move to the next **Title Code** row to continue adding information, if desired.

12. If needed, check  on line of record to delete. The row will be removed.

13. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 44 – TRANSPORTATION REQUEST

The Transportation Request contains four tabs:

- **Transportation Info**
- **Special Conditions**
- **Agreements**
- **Bus Plans**

Figure 2-80 Transportation Request Screen Transportation Info Tab

To create a Transportation Request document:

### TRANSPORTATION INFO TAB

1. Enter the **Today's Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. Specify the **Request** and **Request Type** by clicking in one of the radio buttons provided:

Add **Requesting Case Manager**. The **Case Manager Phone** will import in with the Case Manager's name.

1. Click  next to text: **Requesting Case Manager:**. The Find: Staff screen displays.
2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays in gray box.
6. Enter the **Starting Date** (MMDDYY) or click  and select date.
7. Enter the **Receiving School** and **Program** in the textboxes provided.
8. Select all of the **Days of the Week** that this transportation request applies to.

Add **Receiving Teacher**. The **Teacher Phone** will import in with the Receiving Teacher's name.

1. Click  next to text: **Receiving Teacher:**. The Find: Staff screen displays.
2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays in gray box.
6. Enter the Pick Up Address (AM) along with a **Contact Person's** name and **Phone**.
7. Repeat this for **Drop Off** fields.
8. Specify the **Starting Time and Dismissal Time** of the school. It is only necessary to enter numerals. Synergy SE formats the field once entered, i.e. 900 formats as 9:00 AM.
9. Indicate if the student requires transportation **To and From School Daily** using the checkbox.
10. If a mid-day shuttle is required, complete the information in the textboxes provided.
11. Click .

## SPECIAL CONDITIONS TAB

**Transportation Request**

Student Name: **Tackett, Heather S.** Document: **GENAZ 44** Description: **Transportation Request**

Transportation Info **Special Conditions** Agreements Bus Plans

Document Name  
Transportation Request

Today's Date

**Special Conditions**

Transportation to and from the curb in front of pick up address due to disability/medical condition Student has independent skills. Transportation to and from the curb in front of pickup address.

Special Handling Student requires supervision. It is the responsibility of the parent to assist the child to and from the school vehicle. Justification is required (see space below). Alternate drop required.

Alternate Drop Address \_\_\_\_\_ Name/Relationship \_\_\_\_\_

Phone Number \_\_\_\_\_

Must be within one mile of pick-up/drop address for special handling and wheelchair service. Required for special handling.

Wheelchair Indicate size and style of wheelchair below. Parents to assist student to and from school vehicle. If student does not require supervision, please note below. Alternate drop required.

Reverse Seat Belt Justification is required.

Safety Vest/Reverse \_\_\_\_\_ Justification required.

Ex. Small  Small  Medium  Large  Ex. Large

**Justification Comments**

\_\_\_\_\_

**Behavior Concerns**

\_\_\_\_\_

**Accomodations**

Visually Impaired  Hearing Impaired

Explain Accomodations (dog, cane etc.) \_\_\_\_\_

**Medical or Special Health Care Considerations**

\_\_\_\_\_

**Seizures (Severity & Type)**

\_\_\_\_\_

Figure 2-81 Transportation Request Screen Special Conditions Tab

1. If needed, check one of the special conditions. An explanation of the condition is to the right.

If **Special Handling** is selected:

2. Enter a Justification Comment.
3. Enter an **Alternate Drop Address**, the responsible person's **Name/Relationship** to the student, and that person's **Phone Number**.

If **Wheelchair** is selected:

4. Check size and complete **Alternate Drop** information. If student does not require supervision, note that in **Justification Comments**.

If **Reverse Seat Belt** or **Safety Vest/Reverse** is selected:

5. Enter Justification Comments.
6. Enter any special conditions in the Behavior Concerns, Accommodations, Medical or Special Health Care Considerations and Seizures text boxes.

**AGREEMENTS TAB**

The Parent Agreement section displays the agreement that the parent will sign.

Transportation Request

Student Name: Tackett, Heather S. Document: GENAZ 44 Description: Transportation Request

Transportation Info Special Conditions **Agreements** Bus Plans

Document Name  
Transportation Request

Today's Date

Parent Agreement

I agree to cooperate and will support and enforce the rules and regulations regarding proper conduct of my child while he/she is riding on a school vehicle.

I will have my child ready for the bus ten minutes early Call [ ] or [ ] as early as possible, that student will not require transportation for the day due to illness etc.

Moving/Change Of Address: at [ ] and allow 10 school days after form reaches Transportation for changes to be made. A change of address may require a change of school.

Contact Transportation

**For Transportation Only**

Route # A.M.	Route # Noon	Route # P.M.	Starting Date	Pickup A.M.	Drop - P/U Noon
[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Drop P.M.			[ ]	[ ]	[ ]

\*Must be within 3 miles of home address

Figure 2-82 Transportation Request Screen Agreements Tab

1. Enter two district contact phone number choices, which the parent should call should their child not need transportation due to absence.
2. Enter the district contact phone number that the parent should call to notify transportation of a change of address.

(Transportation Department enters Route Numbers, Starting Dates and Pickup Times in the textboxes provided.)

**BUS PLANS TAB**

**Transportation Request**

Student Name: **Tackett, Heather S.** Document: **GENAZ 44** Description: **Transportation Request**

Transportation Info Special Conditions Agreements **Bus Plans**

Document Name  
Transportation Request

Today's Date

**For all Bus Plans:**

Emergency Contact Name: \_\_\_\_\_

Phone Home#: \_\_\_\_\_  
Numbers: Cell#: \_\_\_\_\_  
Work#: \_\_\_\_\_  
Other#: \_\_\_\_\_

Office/Location \_\_\_\_\_ Fax Number \_\_\_\_\_

**Anaphylaxis**

Anaphylaxis

Student is allergic to: \_\_\_\_\_

Signs that may be present:

<input type="checkbox"/> Itching and Swelling of Lips	<input type="checkbox"/> Swelling of Tongue or Mouth	<input type="checkbox"/> Other
<input type="checkbox"/> Tightness of Throat	<input type="checkbox"/> Hacking Cough or Wheezing	
<input type="checkbox"/> Hives	<input type="checkbox"/> Itching	
<input type="checkbox"/> Nausea or Vomiting	<input type="checkbox"/> Fainting	

Location Of EpiPen: \_\_\_\_\_

Figure 2-83 Transportation Request Screen Bus Plans Tab Part 1

1. **For all Bus Plans:** enter the emergency information for student.
2. Check if the student is subject to **Anaphylaxis**.
3. List any allergies the student has in the text box.
4. Use the checklist to specify signs of allergic reaction.
5. Check Other to provide additional information and enter it in the textbox below the checklist.
6. Fill in the **Location of EpiPen**, if needed.

**Asthma**

Asthma

Notify Parent for:

**Central Line**

Central Line

**Diabetes**

Diabetes

**Gastrostomy**

Gastrostomy

**Seizures**

Seizures

**Tracheal**

Tracheal

Special Instructions:

Figure 2-84 Transportation Request Screen Bus Plans Tab Part 2

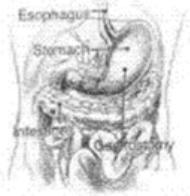
7. Check the box if the student has **Asthma**.
8. If so, enter data in the **Notify Parent for:** textbox.
9. If the student has the following, check the appropriate box or boxes: **Central Line, Diabetes, Gastrostomy, Seizures** or **Tracheal**.
10. If **Tracheal** is selected, list any **Special Instructions**.

When printed, the transportation request will automatically add Bus Plans for possible problems along with actions to take for each checkbox selected. An example is displayed below.

The document can be [printed](#), [validated](#) and [finalized](#).

**Gastrostomy Button : Bus Plan**

This student has a gastrostomy tube which goes into the stomach. If the tube accidentally falls out, call the parent or school nurse with any questions. This is not a 911 emergency, but the parent and school need to be notified.

Problem	Action
Vomiting or Nausea	Notify parent and school of vomiting, monitor airway
G-button / tube falls out: <b>Do NOT re-inflate or replace tube into stomach</b>	Notify parent and school, may need to be reinserted immediately by parent or provider. Cover site with dry dressing. Site may leak.

Figure 2-85 Bus Plans Example

## PRINT ONLY DOCUMENTS

The following are print-only documents.

Click [Create](#) on line of desired document. The document will generate a pdf that has the student's demographic information inserted.

GENAZ 45	Print Only Alternate Assessment Eligibility Criteria Form
GENAZ 46	Print Only APE Instruction Letter Print
GENAZ 47	Print Only Eye Exam Report
GENAZ 48	Print Only IEP Attendance Form
GENAZ 49	Print Only IEP Signature Page
GENAZ 50	Print Only Information Processing Worksheet for SLD
GENAZ 51	Print Only Medical Verification For Other Health Impaired (OHI)
GENAZ 52	Print Only Medical Verification For Orthopedically Impaired (OI)
GENAZ 53	Print Only Medical Verification For Traumatic Brain Injury (TBI)
GENAZ 54	Print Only Photo Release
GENAZ 55	Print Only Reevaluation Agreement
GENAZ 70	Print Only MET Review
GENAZ 71	Print Only Special Ed Signature Checklist
GENAZ 72	Print Only Special Activity Request
GENAZ 73	Print Only Transportation Monitor Request
GENAZ 74	Print Only Internet and Media Opt Out Form English
GENAZ 75	Print Only Internet and Media Opt Out Form Spanish

## GENAZ 99 – BEHAVIOR INTERVENTION PLAN

The Behavior Intervention Plan works in conjunction with the Functional Behavior Assessment – GENAZ 34. Target Behavior as listed in the FBA is imported into the Behavior Intervention Plan.

The Behavior Intervention Plan contains two tabs:

- **Team Members**
- **Method**

**Behavior Intervention Plan**

Student Name: **Tacho, Katherine A.** Document: **GENAZ 99** Description: **Behavior Intervention Plan**

**Team Members** | Method

Document Name  
Behavior Intervention Plan

Document Date  
[Calendar Icon]

An individual behavior plan is a clearly stated working document which incorporates information from a functional behavior assessment and describes the goals and methods intended to modify a student's negative behavior. A separate plan may be required for each targeted behavior. A successful behavior plan eliminates the negative behavior and allows the student to fulfill the function of the negative behavior through the development of new, positive behaviors.  
(Note: Behavioral consequences should protect the health and self-esteem of the student and be consistent with local guidelines regarding the use of aversives.)

**Team members who participated in developing the FBA plan:**

Student

**Parents**

Line	Parent Name	Relation Type	Participant
1	Tacho, Ernest	Father	<input type="checkbox"/>
2	Tacho, Rachel	Mother	<input type="checkbox"/>

**Staff** [Add]

Line	Staff Name	Role	Job Title
1	User, Admin	Case Carrier	
2	Andrews, Mark	Case Carrier	

**Other specialists** [Add]

Line	Name	Role	Job Title
------	------	------	-----------

I. Target Behavior [Refresh Target Behavior]

Figure 2-86 Behavior Intervention Plan Screen

To create a Behavior Intervention Plan document:

1. Enter the **Document Date** (MMDDYY) or click [Calendar Icon] and select date. This should reflect the date the document was created.

### TEAM MEMBERS TAB

The team members who participated will pull from the student's current Team List, however participant changes can be made directly to this document.

2. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
3. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the

student’s Team List. If a Staff name is added to this document, the name will display on this document only and not on the student’s Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Staff			Add
Line	Staff Name	Role	
1	Green, Tom	Case Carrier	
2	User, Admin	Teacher Specialist	

Figure 2-87 Behavior Intervention Plan Screen Staff Section Change/Add

Change current staff names:

Find Close Select Clear Selection

### Find: Staff

**Find Criteria**

Last Name	First Name	Middle Name
Smith	C	

**Search Results**

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-88 Find: Staff Screen

1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.
2. Enter all or part of staff **Last Name, First Name**.
3. Click Find or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click Select. Find: Staff screen closes and staff name displays.

Staff			Role
Line	Staff Name	Role	
1	Green, Tom	Case Carrier	Physical Therapist
2	User, Admin	Teacher Specialist	Psychologist
3	Smith, John		Reader

Figure 2-89 Behavior Intervention Plan Screen Staff Section Select Role

6. Click the **Role** dropdown and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Specialists section will allow for participant names that are not available in the Staff directory.

4. Click the **Add** button on the Other Specialists bar. A new row will be added.
5. Enter the **Name, Role** and **Job Title** of the specialist.
6. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.

The Target Behavior is auto-populated from the Functional Behavioral Assessment document. However, users may enter additional information by typing in the box. Users may check to ensure that the most current data has been imported from the FBA by clicking Refresh Target Behavior.



**Caution:** Clicking the Refresh buttons will overwrite information previously entered into the textbox. Make sure to Refresh prior to adding any current data.

### METHOD TAB

1. To add Environmental Strategies/Supports click the **Add** button. A new row will be added.
2. Select a **Strategy/Support** along with the **Frequency** from the drop down boxes.
3. Enter the **Person Responsible** for implementing the Strategy/Support.

Line	Strategy/Support	Frequency	Person Responsible
1			

Figure 2-90 Behavior Intervention Plan Screen Part 2

4. To add Instructional Strategies click the **Add** button. A new row will be added.
5. Select the **Strategy** and **Frequency** from the drop down boxes.
6. Type in the **Person Responsible** for implementing the Strategy.

Line	Strategy	Frequency	Person Responsible
1			

Figure 2-91 Behavior Intervention Plan Screen Part 3

7. Enter the **Identified Positive Reinforcers** and desired **Replacement Behaviors**. Use to spellcheck. Use for more space.

IV. Identified Positive Reinforcers (based upon administration of a positive reinforcer survey, parent input, student input, etc.)

V. Replacement Behavior (What the student should do in place of the problem behavior to meet his/her need(s) [gain, avoid, protest] in an acceptable way.)

Figure 2-92 Behavior Intervention Plan Screen Parts 4 and 5

8. To add Positive Reinforcement Procedures, click the **Add** button.
9. After adding the row, continue to fill out the desired **Tier**, **When Student Does**, **Frequency**, what the **Student Will Earn** and **Person Responsible** information.

Line	Tier	When Student Does	Frequency	Student will Earn	Person Responsible
1					

Figure 2-94 Behavior Intervention Plan Part 6

10. In the Materials section, click **Add**. A new row displays.
11. Enter Tier, Materials Needed and Person Responsible in the row created.

Line	Tier	Materials Needed	Person Responsible for Obtaining/Creating
1			

Figure 2-93 Behavior Intervention Plan Screen Part 7

- Complete the fields **Response Cost/Negative Consequence** and **Monitoring** with the indicated data.

VIII. Response Cost/Negative Consequences for Undesirable Behavior(s) – Optional

IX. Monitoring

Person to manage BIP and collect data ←

Data will be collected [dropdown] and reviewed [dropdown]

Date of BIP Initiation [calendar icon]

Date of BIP team review meeting [calendar icon]

Figure 2-95 Behavior Intervention Plan Screen Parts 8 and 9

- Click ← next to the **Person to manage BIP and collect data**. The Find: Staff screen displays.

Find Close Select Clear Selection

**Find: Staff**

**Find Criteria**

Last Name	First Name	Middle Name
Smith	C	

**Search Results**

**Find Result**

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-96 Find: Staff Screen

- Enter all or part of staff **Last Name, First Name**.
- Click **Find** or press **ENTER**. Search Results displays a list of matching criteria.
- Click line of staff name. Line highlights.
- Click again or click **Select**. Find: Staff screen closes and staff name displays.
- Click **Save**.

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 100 – NOTICE OF GRADUATION

The Notice of Graduation is a document with a unique function. This notice will exit the graduating student from Synergy SE. The Notice of Graduation is an optional document and not all districts will see this document.

The Notice of Graduation is moved to Historical Docs and the student will be removed from any Synergy SE process when this document is finalized.

[\(See: Documents With Unique Functionality\)](#)



**Note:** The Notice of Graduation has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Graduation contains one tab:

- **Prior Written Notice**

Figure 2-97 Notice of Graduation Screen

To create a Notice of Graduation document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Click the Change Decision to “Notice of Graduation” button.

Figure 2-98 Notice of Graduation Screen Change Decision Button

- The Statements section contains four statements with response boxes. Keyword drop-downs may be available for auto input of responses. If none are visible, enter responses manually. Use  to spellcheck. Use  for more space.

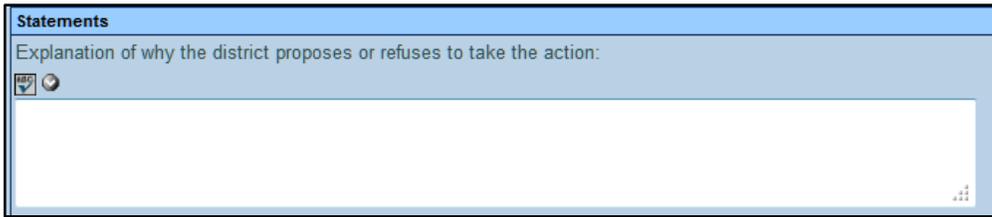


Figure 2-99 Notice of Graduation Screen Statements Section With Keyword Drop-down

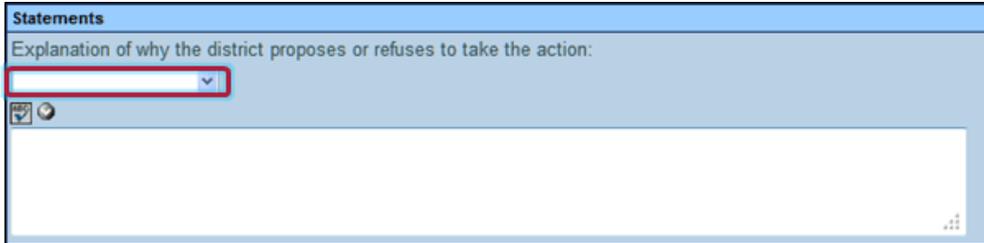


Figure 2-101 Notice of Graduation Screen Statements Section Without Keyword Drop-down

- Enter date that decision will be implemented (MMDDYY) or click  and select date.

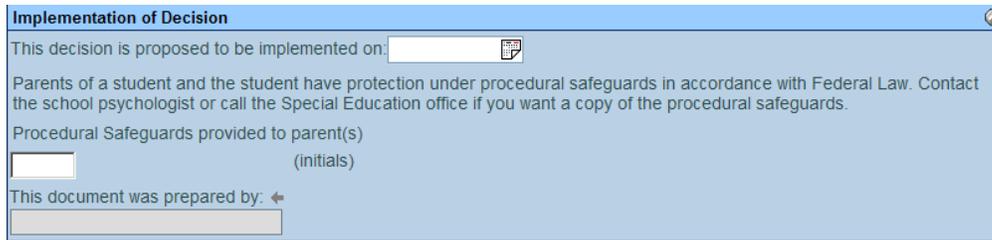


Figure 2-100 Notice of Graduation Screen Implementation of Decision

- Enter **(initials)** to signify that the Procedural Safeguards were provided to parent.
- Click on the  next to the words **This document was prepared by:**. The Find: Staff screen opens.

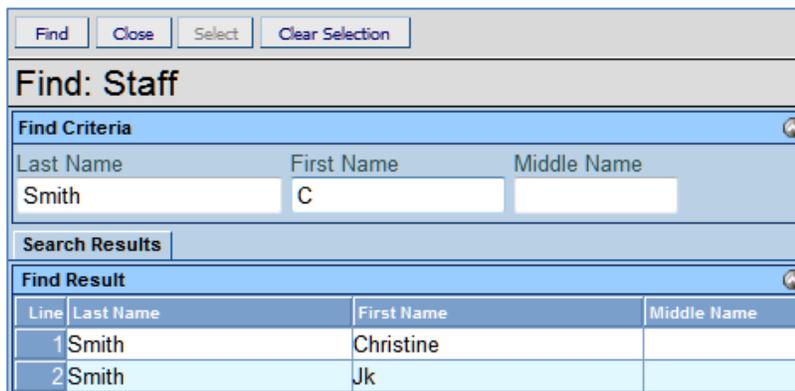


Figure 2-102 Find: Staff Screen

- Enter all or part of Staff **Last Name, First Name**.
- Click  or press **ENTER**. Search Results displays a list of matching criteria.
- Click line of staff name. Line highlights.
- Click again or click . Find: Staff screen closes and staff name displays.

11. Click .
12. Click **Finalize**.

If the student's draft IEP has not been removed, this window displays:

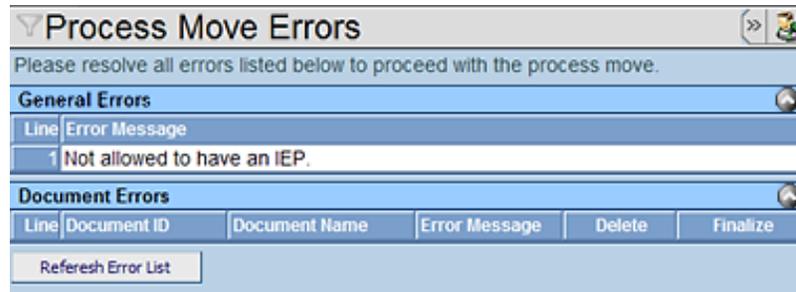


Figure 2-103 Process Move Errors

13. **Delete** the IEP.
14. Click **Finalize**. The student record will be removed from the Portfolio screen. The finalized document displays on the Historical Docs tab.

## GENAZ 500 – ESY LETTER

The ESY Letter is used to remind parents of their child's ineligibility for Extended School Year (ESY).

The ESY Letter contains one tab:

- **ESY Letter**

**ESY Letter** ◀

Student Name: **Abbott, Billy C.** Document: **GENAZ 500** Description: **ESY Letter**

**ESY Letter**

Document Name  
ESY Letter

Document Date

**Extended School Year Notice**

Dear Parent/Guardian of: **Abbott, Billy C.**

The recognizes that some students receiving special education may need services beyond the traditional school year. The purpose of Extended School Year (ESY) is to:

- Prevent irreparable harm to the child's ability to maintain identified skills or behavior.
- Assist Children who reach critical learning stages who are unlikely to receive another opportunity to learn or generalize targeted skills or behavior.

The purpose of this letter is to remind you that your child was not determined eligible for Extended School Year programming as documented in your child's IEP dated: **11/29/2011**

If needed, you can review any data assessments or observation reports used by the IEP team. The reason for this action is the educational progress of your child will not be severely impacted by the summer break.

**IEP Items Reviewed and Considered:**

- Critical learning stages
- Data-based observations
- Information provided by parent(s) and teachers and other(s)
- Least restrictive environment consideration
- Previous history
- Progress report(s) of annual goals
- Regression and recoupment evidence
- The current IEP or IFSP (present levels of educational performance, annual goals, objectives, etc.)
- Other factors:

**Parents Rights**

These factors are defined in your parent handbook entitled Explanation of Procedural Safeguards. If you need another copy of your procedural safeguards, it may be obtained by contacting the school. You have the right to request an IEP meeting, at any time, if you feel your child's IEP should be changed.

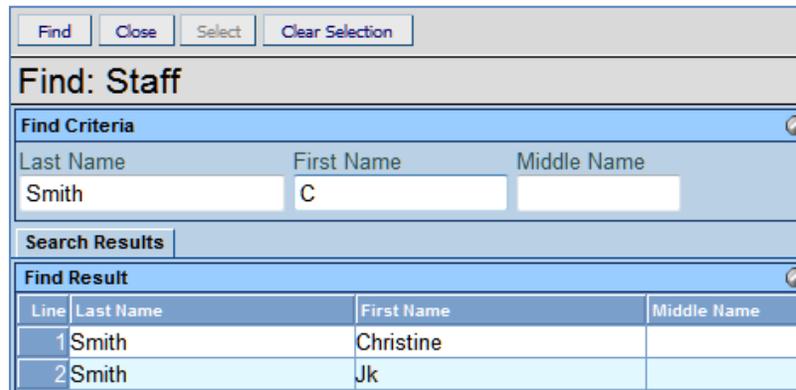
Please call me at  if you have any questions.

Sincerely,  
Staff Name

Figure 2-104 ESY LetterScreen

To create an ESY Letter document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Check applicable IEP Items Reviewed and Considered.
3. If desired, check Other and explain in the textbox below.
4. Include the appropriate phone number in the Parents Rights section.
5. Click ← next to **Staff Name**. The Find: Staff screen displays.
6. Enter all or part of staff **Last Name, First Name**.



Find: Staff			
Find Criteria			
Last Name	First Name	Middle Name	
Smith	C		
Search Results			
Find Result			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-105 Find: Staff Screen

7. Click  or press **ENTER**. Search Results displays a list of matching criteria.
8. Click line of staff name. Line highlights.
9. Click again or click . Find: Staff screen closes and staff name displays in gray box.
10. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 501 – TAP LETTER

The Team Approach Process (TAP) Letter can be used to request a meeting time with the parent to discuss additional resources needed for their child.

The TAP Letter contains one tab:

- **TAP Letter**

Menu Save Undo Delete Print Preview Validate Finalize Status: Ready

TAP Letter

Student Name: Alejandroz, Willie JR Document: GENAZ 501 Description: TAP Letter

TAP Letter |

Document Name Document Date

TAP Letter

**Team Approach Process Notice**

Dear Parent/Guardian of: Alejandroz, Willie JR

The strives to meet the individual academic and behavioral needs of its students. A variety of approaches, materials, and staff are used to try and accomplish this goal.

Recently, it has come to my attention that your child may not be receiving the full benefit of available school resources. We would like to share our concern regarding your child's educational progress at this time, and invite you to confer with us in order to exchange information that may be helpful to us and your child.

We call this endeavor the Team Approach Process (TAP). With your help we can better assess the educational needs of your child and plan the most appropriate educational program. The need for a positive learning experience is a goal that we share for your child.

**Purpose of Letter**

This letter is to inform you that we would like to schedule a TAP meeting with you. This meeting is scheduled for:

Meeting Date: Meeting Time:

Location, Building, Room

The enclosed Procedural Safeguards explain your rights regarding special education provisions.

This letter is to inform you that you will be contacted by: Staff Name ◀

to discuss options available to you. The enclosed Procedural Safeguards explain your rights regarding special education provisions.

Figure 2-106 TAP Letter Screen

To create a TAP Letter document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. Place a check in the **Purpose of Letter Section** indicating that a TAP meeting would like to be scheduled.
3. Enter the Meeting Date, Meeting Time and Location, Building, Room of the Meeting.
4. Check This letter is to... line
5. Click ◀ next to **Staff Name**. The Find: Staff screen displays.
6. Enter all or part of staff **Last Name, First Name**.

Find Close Select Clear Selection

**Find: Staff**

**Find Criteria**

Last Name	First Name	Middle Name
Smith	C	

**Search Results**

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-107 Find: Staff Screen

7. Click or press **ENTER**. Search Results displays a list of matching criteria.
8. Click line of staff name. Line highlights.
9. Click again or click . Find: Staff screen closes and staff name displays.
10. Click .

11. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 502 – TAP PARENT NOTICE

The Team Approach Process (TAP) Parent Notice functions the same as a prior written notice. It is used to inform the parent of the TAP team's intent to refer to special education, not take any further action, or state that further data is needed for a decision. These options may be selected from the drop down box in the **Based on the Review, That Data Suggest** section.

The TAP Parent Notice contains one tab:

- **TAP Parent Notice**

Figure 2-108 TAP Parent Notice Screen

To create a TAP Parent Notice document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Describe the results of attempted correspondence in the **Meeting Notice Documentation** section.
3. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included.
4. On the Parents section, check **Participant**, to include each parent/guardian name, as a participant. If these are left blank, the names will not be included as participants.

Participants:			
<input type="checkbox"/> Student			
Parents			
Line	Parent Name	Relation Type	Participant
1	Aaron, Kathleen	Mother	<input type="checkbox"/>
2	Aaron, Phillip	Father	<input type="checkbox"/>
3	Williams, Silver	Step-Father	<input type="checkbox"/>
Staff			
			Add
Line	Staff Name	Role	
<input type="checkbox"/>	1 Aderson, Gordon	Reader	
<input type="checkbox"/>	2 User, Admin	Special Ed Teacher	
<input type="checkbox"/>	3 Blasdel W., Wendy	Reader	
<input type="checkbox"/>	4 Wilson, Rob	Case Carrier	
Other Specialists			
			Add
Line	Name	Role	
<input type="checkbox"/>	1		

Figure 2-109 TAP Parent Notice Screen Parent Notice Participants

The Staff section displays the staff members who have been added to the student’s Team List. Names can be added or removed from the staff section of this document without affecting the student’s Team List. If a Staff name is added to this document, the name will display on this document only and not on the student’s Team List. Staff Names displaying will be included as participants, however, changes may be made including additional staff names added.

Change current staff names:

1. Click ← next to the **Staff Name** to change. The Find: Staff screen displays.
2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.

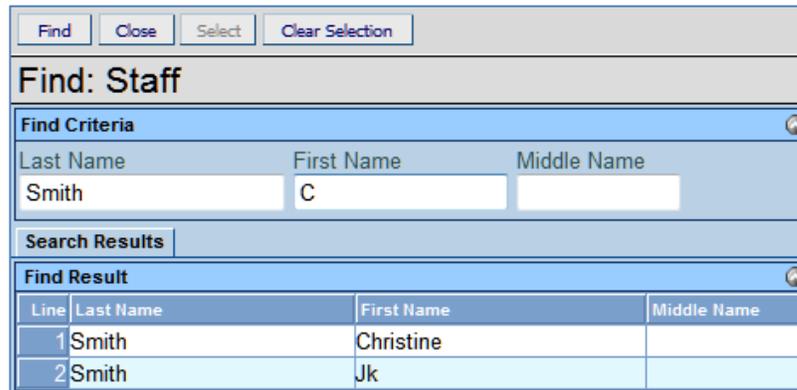


Figure 2-110 Find: Staff Screen

6. Click the **Role** dropdown and select the staff role.

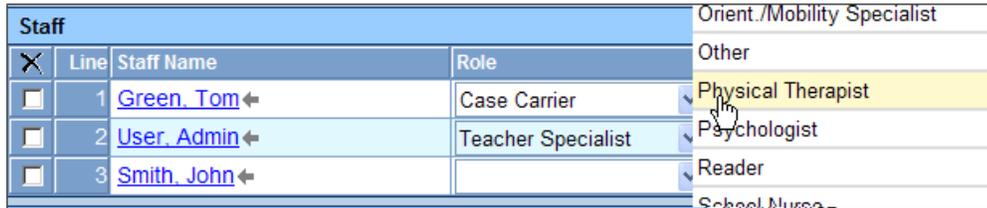


Figure 2-111 TAP Parent Notice Screen Staff Section Select Role

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Specialists section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** button on the Other Specialists bar. A new row will be added.



Figure 2-112 TAP Parent Notice Screen Other Specialists

2. Enter the **Name** and **Role** of the specialist.

Figure 2-113 TAP Parent Notice Screen Basis for Proposed Action

1. Check any Basis for Proposed Action that applies.
2. Check **Other** and enter a description to provide a customized basis.
3. A text box has been provided to allow for **Summary Statements** of the information selected.
4. Using the drop down select the desired statement for **Based on the Review Activities...** and type any **Other Relevant Factors**.

Figure 2-115 TAP Parent Notice Screen Based on Review Activities

5. Click ← next to **Form Completed By:** and use the Find: Staff view. Select the staff member's **Title/Position** using the available drop down.
6. Click .

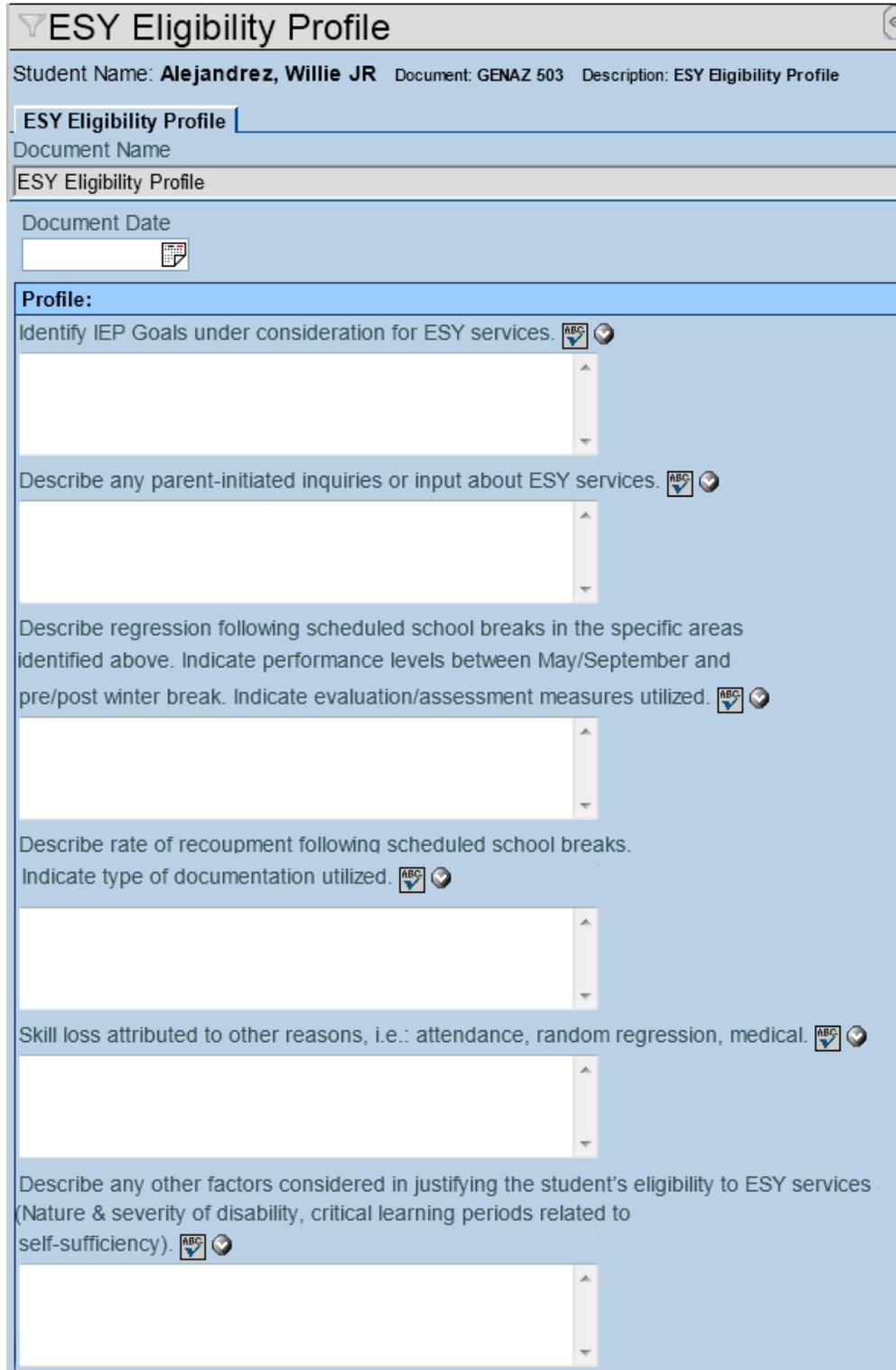
The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 503 – ESY ELIGIBILITY PROFILE

The Extended School Year (ESY) Eligibility Profile describes, in detail, the reasons a student may be eligible for ESY services.

The ESY Eligibility Profile contains one tab:

- **ESY Eligibility Profile**



**ESY Eligibility Profile**

Student Name: **Alejandro, Willie JR** Document: **GENAZ 503** Description: **ESY Eligibility Profile**

**ESY Eligibility Profile**

Document Name  
ESY Eligibility Profile

Document Date

**Profile:**

Identify IEP Goals under consideration for ESY services.  

Describe any parent-initiated inquiries or input about ESY services.  

Describe regression following scheduled school breaks in the specific areas identified above. Indicate performance levels between May/September and pre/post winter break. Indicate evaluation/assessment measures utilized.  

Describe rate of recoupment following scheduled school breaks. Indicate type of documentation utilized.  

Skill loss attributed to other reasons, i.e.: attendance, random regression, medical.  

Describe any other factors considered in justifying the student's eligibility to ESY services (Nature & severity of disability, critical learning periods related to self-sufficiency).  

Figure 2-116 ESY Eligibility Profile Screen

To create an ESY Eligibility Profile document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Complete the Profile: textboxes. Each field has the  spellcheck and  for more space.
3. Select the **ESY Eligibility** recommendation from drop down list.

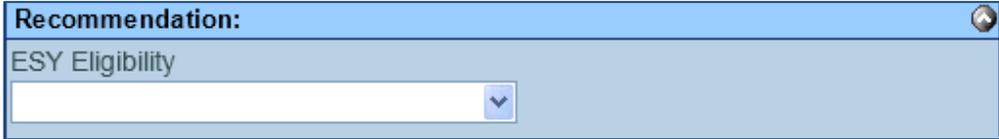


Figure 2-117 ESY Eligibility Profile Screen Recommendation

4. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Staff				Add
✕	Line	Staff Name	Role	
<input type="checkbox"/>	1	Green, Tom ←	Case Carrier	
<input type="checkbox"/>	2	User, Admin ←	Teacher Specialist	

Figure 2-118 ESY Eligibility Profile Screen Staff Section Change/Add

Change current staff names:

1. Click ← next to the **Staff Name** to change. The Find: Staff screen displays.

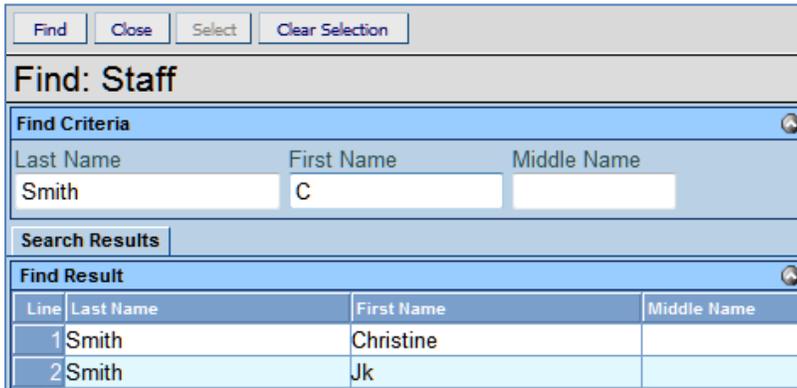


Figure 2-119 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.

6. Click the **Role** dropdown and select the staff role.

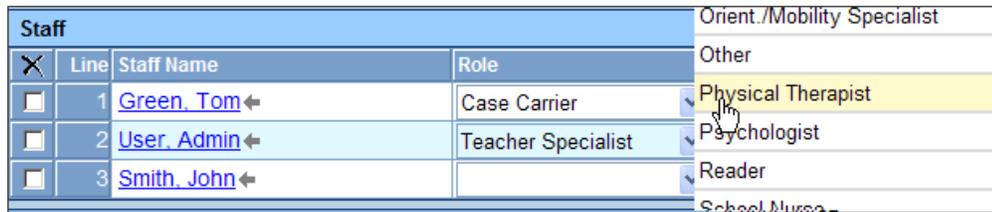


Figure 2-120 ESY Eligibility Profile Screen Staff Section Select Role

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.

3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Specialists section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** button on the Other Specialists bar. A new row will be added.
2. Enter the **Name, Role** and **Job Title** of the specialist.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 504 – AZ504ELIGIBILITY

Use the AZ504Eligibility document is a Notice of Section 504 Eligibility Form that is used when determining if a student is eligible for services under Section 504.

The AZ504Eligibility contains four tabs.

- **Evaluation Information**
- **Eligibility Analysis**
- **Eligibility Determination**
- **Attachments**

The screenshot shows the 'AZ504Eligibility' interface. At the top, it displays the student name 'Tacho, Katherine A.', document 'GENAZ 504', and description 'Notice of Section 504 Student Eligibility Form'. Below this are four tabs: 'Evaluation Information' (highlighted with a red box), 'Eligibility Analysis', 'Eligibility Determination', and 'Attachments'. The 'Evaluation Information' section includes a 'Document Alias' field with the text 'Notice of Section 504 Student Eligibility Form' and a 'Document Date' field with a calendar icon. A section titled 'Evaluation Information: (check all that apply)' contains several checkboxes: Psychological Evaluation, Physician Report, Achievement Tests, Teacher Recommendations, Observation Data, Teacher Input, Discipline History, Parent Information, Curriculum Based Assessments, and Other. Below this is an 'Other' text box with a spellcheck icon and a globe icon.

Figure 2-121 AZ504Eligibility Screen Evaluation Information Tab

To create an AZ504Eligibility document:

### EVALUATION INFORMATION TAB

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. Check all sources of evaluation information used to determine 504 Eligibility.
3. Check **Other** and input any additional information in the **Other** textbox. Use to spellcheck and for more space.
4. Click and move to the next tab.

**ELIGIBILITY ANALYSIS TAB**

Figure 2-122 AZ504Eligibility Screen Evaluation Information Tab Part 1 and 2

1. Select **Yes** or **No** from drop down to indicate whether the student has a mental or physical impairment.

Identify impairments:

1. Click **Add** on the bar below for each impairment to identify. A new line is added each time to the grid.
2. Complete each line with the name of the **Impairment**, **Diagnosed By** and the **Date** it was diagnosed.



3. If needed, check  on the line of an impairment to delete. The row is removed.
4. Summarize supporting evaluation information in the text box.

Rule out other factors:

1. Under Section 2., select **Yes** or **No** from the drop down to indicate whether culture, economics, or environment account for limitations.
2. If **No**, move to the next section. If **Yes**, describe why CEE impacts Major Life Activity in the text box.

**3. Temporary Impairment**  
Is the impairment temporary?  
[Dropdown menu]

**4. Impairments episodic or in remission**  
Are any of the student's identified or suspected impairments episodic or in remission?  
[Dropdown menu]  
If "Yes", state which of the identified or suspected impairments is episodic or in remission and describe the frequency, intensity or expected duration of the impairment's symptoms or characteristics [Text box]

Figure 2-123 AZ504 Eligibility Screen Information Tab Part 3 and 4

Temporary impairment:

1. Under Section 3., select **Yes** or **No** from the drop down to answer the question: **Is the impairment temporary?**
2. Using the drop down select **Yes** or **No** if the student's impairments are episodic (occurring or appearing in irregular intervals) or in remission (the symptoms have subsided or no longer observed).
3. If **No**, move to the next section. If **Yes**, indicate which impairments are episodic or in remission along with frequency, intensity and duration in the provided text box.

**5. Identified impairment(s) limit any of MLA or MBF if not have mitigating measures in place**

Would the student's identified impairment(s) limit any of the following major life activities (MLA) or major bodily functions (MBF) if the student does not or did not have mitigating measures in place?

In terms of frequency, intensity and duration, does the impairment, when in an active state, substantially limit a MLA/MBF when compared to how the average, non-disabled student performs the same major life activity? If so, please check which of the following major life activities or major bodily functions are or may be limited by the impairment(s)

<input type="checkbox"/> Caring for One's Self	<input type="checkbox"/> Learning	<input type="checkbox"/> Eating
<input type="checkbox"/> Hearing	<input type="checkbox"/> Thinking	<input type="checkbox"/> Speaking
<input type="checkbox"/> Walking	<input type="checkbox"/> Concentrating	<input type="checkbox"/> Sleeping
<input type="checkbox"/> Bending	<input type="checkbox"/> Reading	<input type="checkbox"/> Communicating
<input type="checkbox"/> Standing	<input type="checkbox"/> Seeing	<input type="checkbox"/> Other

Other

A. Is the student using any measures or other modifications to reduce or control the effect of the impairment?

B. How is the impairment being mitigated?

C. Describe the extent to which a MLA/MBF is limited if the student was not using a mitigating measure

D. Describe how and the degree to which the impairment limits MLA/MBF

Explain

Figure 2-124 AZ504Eligibility Screen Information Tab Part 5

1. In section 5, select Yes or No from the drop down to indicate if the Identified impairments limit (Major Life Activities) MLA or Major Bodily Functions (MBF) if the student does not or did not have mitigating measures in place.
2. Check all identified MLA or MBF activities affected. An **Other** textbox is provided for any additional areas noted by the team.
3. Answer **Yes** or **No** from the drop down to indicate whether the student is using any additional measures or modifications to reduce the effects of the impairment.
4. In the provided text box answer how the impairment is mitigated.
5. Describe the extent to which the MLA/MBF is limited when not using a mitigating method.
6. Describe how and the degree to which impairment limits MLA/MBF by selecting **Negligible, Mild/Moderate, Substantial, or Severe** from the drop down. Explain your answer the text box below.

## ELIGIBILITY DETERMINATION TAB

**AZ504Eligibility**

Student Name: Tackett, Heather S. Document: GENAZ 504 Description: Notice of Section 504 Student Eligibility Form

Evaluation Information Eligibility Analysis **Eligibility Determination** Attachments

Document Alias Notice of Section 504 Student Eligibility Form Document Date

Based on analysis of the evaluation data, does the student have a disability that substantially limits a major life activity?

The student is Section 504 eligible but does not require a Section 504 EEOP because

Does the student require specific health management protocols to manage the effects of a chronic or acute health or medical impairment?

**Participants:**

Student (grades 7-12 must be invited):

**Parent Participants**

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Participant
1	Hunt, Donna	Grandmother	Yes	Yes	<input type="checkbox"/>
2	Tackett, Carl	Father	No	No	<input type="checkbox"/>
3	Lou, Cheryl	Mother	No	No	<input type="checkbox"/>

**Staff Participants** Add

Line	Staff Name	Role
1	Admin User	Behavior Intervention Specialist
2	ReadOnly User	Case Carrier

**Other Participants** Add

Line	Name	Role
------	------	------

**Parental Notice**

I have received a copy of this Notice of Section 504 Eligibility and have received a copy of the Parent's Notice of Section 504 Rights.

Parent Signature Date

Figure 2-125 AZ504Eligibility Screen Eligibility Determination Tab

1. Select the appropriate determination from the drop down to indicate whether the **student has a disability that substantially limits a major life activity**. If the team selects No or that an EEOP plan is required the user will not have the option to select a choice from the following field.
2. If the user selects that the statement indicating the **student is eligible for a 504 but does not require an EEOP because** they must hit the Save before the user can select **why an EEOP is not required** from the following drop down.
3. Select **Yes** or **No** to indicate if the student requires special health management protocols.

## Participants:

4. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant. Students in grades 7-12 must be invited.
5. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Staff			Add
Line	Staff Name	Role	
1	Green, Tom ←	Case Carrier	
2	User, Admin ←	Teacher Specialist	

Figure 2-126 AZ504Eligibility Screen Staff Section Change/Add

Change current staff names:

1. Click ← next to the **Staff Name** to change. The Find: Staff screen displays.

Find	Close	Select	Clear Selection
Find: Staff			
Find Criteria			
Last Name	First Name	Middle Name	
Smith	C		
Search Results			
Find Result			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-127 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click **Find** or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click **Select**. Find: Staff screen closes and staff name displays.

Staff			Role
Line	Staff Name	Role	
1	Green, Tom ←	Case Carrier	Physical Therapist
2	User, Admin ←	Teacher Specialist	Psychologist
3	Smith, John ←		Reader

Figure 2-128 AZ504Eligibility Screen Staff Section Select Role

6. Click the **Role** dropdown and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Specialists section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Specialists bar. A new row will be added.
2. Enter the **Name, Role** and **Job Title** of the specialist.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.

- Indicate **Parental Notice** by typing in the Parent's name and entering the date notice was given to parents by using the Calendar icon or type in the date using MM/DD/YYYY format.

### ATTACHMENTS TAB

Figure 2-129 AZ504Eligibility Screen Attachments Tab

- Attachments may be saved along with the document. To add a document click **Add**. A small upload window opens.

Figure 2-130 Upload File Screen

- Click **Browse** to locate the document on your computer.
- Once selected, click **Upload**. The document title and type display on the line. Only PDF and Word documents may be attached.

Line	Print Order	Comment	Document
1		Physician Summary Statement	

Figure 2-131 AZ504Eligibility Screen Word Document Attachments

- Click **Save**.

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 505 – ESY ADDENDUM

The Extended School Year (ESY) Addendum includes the IEP Meeting Notice documentation, as well as details of the goals and objectives, program description, special considerations and parent participation. This document is an addendum to the student's current IEP.

The ESY Addendum contains one tab:

- **ESY Addendum**

The screenshot shows a software interface for creating an ESY Addendum. At the top, it displays the student's name 'Tacho, Katherine A.' and the document title 'GENAZ 505'. Below this, there is a tab labeled 'ESY Addendum'. The form is divided into several sections, each with a title and a text input area: 'Document Name' (filled with 'ESY Addendum'), 'Document Date' (with a calendar icon), 'Meeting Notice Documentation' (containing 'Date of Meeting Notice', 'Date of IEP Meeting', and 'Record of Attempt to Arrange Meeting'), 'ESY Goals/Objectives', 'Program Description', 'Special Considerations', and 'Description of Parental Participation'. Each section has a small icon next to its title.

Figure 2-132 ESY Addendum Screen Screen

To create an ESY Addendum document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. Using the Calendar select the Date of Meeting Notice and Date of IEP Meeting.
3. Type in Record of Attempt to Arrange Meeting in the textbox.
4. All **ESY Goals/Objectives** that were checked in the finalized IEP will be imported. In addition, goals and objectives may be added and edited by typing in the textbox.
5. Complete the Program Description, Special Considerations, and Description of Parental Participation.

## Participants:

1. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant. Students in grades 7-12 must be invited.
2. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Staff				Add
✕	Line	Staff Name	Role	
<input type="checkbox"/>	1	Green, Tom ←	Case Carrier	▼
<input type="checkbox"/>	2	User, Admin ←	Teacher Specialist	▼

Figure 2-133 ESY Addendum Screen Staff Section Change/Add

## Change current staff names:

1. Click ← next to the **Staff Name** to change. The Find: Staff screen displays.

Find: Staff			
Find Criteria			
Last Name	First Name	Middle Name	
Smith	C		
Search Results			
Find Result			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 2-134 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.

Staff				Orient./Mobility Specialist
✕	Line	Staff Name	Role	
<input type="checkbox"/>	1	Green, Tom ←	Case Carrier	▼
<input type="checkbox"/>	2	User, Admin ←	Teacher Specialist	▼
<input type="checkbox"/>	3	Smith, John ←		▼

Figure 2-135 ESY Addendum Screen Staff Section Select Role

6. Click the **Role** dropdown and select the staff role.

## Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Specialists section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Specialists bar. A new row will be added.
2. Enter the **Name, Role** and **Job Title** of the specialist.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.

Prior Written Notice

1. Indicate **Parental Notice** by typing the parent’s name and entering the date notice was given to parents (MMDDYY) or click  and select date.
2. Check all Sources of information used as basis for proposal:.
3. Add the **IEP (Date)** (MMDDYY) or click  and select date.
4. If needed, type additional information in the **Other** box.
5. Enter **The reason for this proposal . .** in the textbox. Use  to spellcheck. Use  for more space.

Figure 2-136 ESY Addendum Screen Prior Written Notice

6. Indicate **Parent Consent** by selecting the response of **Accept, Decline** or **Did Not Respond** from the drop down box.

Figure 2-137 ESY Addendum Screen Parent Consent

7. Enter the **Parent Signature Date** (MMDDYY) or click  and select date.
8. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 700 – HEALTH AIDE PREPAYMENT REVIEW FORM

The Health Aide Prepayment Review Form has one tab:

- **Health Aide Prepayment Review**

Health Aide Prepayment Review Form		
Student Name: _____ Document: GENAZ 700 Description: Health Aide Prepayment Review Form		
<b>Health Aide Prepayment Review</b>		
Document Name	Document Date	
Health Aide Prepayment Review Form	_____ [PDF]	
<b>1. Complete Contact Information</b>		
Contact name:	Job title:	
_____	_____	
Contact e-mail:	Contact telephone number:	
_____	_____	
<b>2. Complete Student IEP Information</b>		
Note: (if amendment is related to Health Aide services, please use the effective date of the amendment as the IEP start date)		
Student Last Name:	Student First Name:	
_____	_____	
AHCCCS ID #: (Axxxxxxxx)	Birth Date	
_____	_____ [PDF]	
Start date of IEP: (mm/dd/yyyy)	End date of IEP: (mm/dd/yyyy)	
_____ [PDF]	_____ [PDF]	
<b>3. Number of Health Aide Minutes Per Day Requested</b>		
Number of health aide minutes per day requested: _____		
<b>4. List Name(s), Position, and Certification of Qualified Medical Provider(s) That Signed the IEP and Recommended Activities of Daily Living (ADL)</b>		
Provider Name:	Position:	Certification or License:
_____	_____	_____
_____	_____	_____
_____	_____	_____
Qualified medical providers: Audiologist, Licensed Clinical Social Worker (LCSW), Licensed Marriage and Family Therapist (LMFT), Licensed Professional Counselor (LPC), Occupational Therapist, Physical Therapist, Psychiatrist, Psychologist, School Based Guidance Counselor, School based Licensed Practical Nurse (LPN), School Based School Psychologist, School Based Registered Nurse (RN), Speech-Language Pathologists (SLP)		
<b>5. What Medicaid Reimbursable Activities of Daily Living (ADL) have been prescribed for the student?</b>		
Check only those that apply to the student.		
<input type="checkbox"/> Dressing	<input type="checkbox"/> Mobility	<input type="checkbox"/> Transfers
<input type="checkbox"/> Eating/Feeding	<input type="checkbox"/> Positioning	<input type="checkbox"/> Use of Assistive devices
<input type="checkbox"/> Grooming	<input type="checkbox"/> Toileting	
<b>6. Page Number(s) of the IEP That Demonstrate the Need for the ADL(s) Listed Above</b>		
List the page number(s) of the IEP that demonstrate the qualified medical provider is recommending need for the ADL(s) Identified Above. Please highlight relevant sentences in attached copy of the IEP.		
_____		
<b>7. Page Number(s) of the IEP that state the Scope, Frequency, and Duration (SFD) of Medicaid Allowable Services</b>		
List the page number(s) of the IEP that clearly state the scope, frequency, and duration (SFD) of Medicaid allowable services to be provided by a health aide. Please highlight SFD in attached copy of the IEP.		
_____		
<b>8. Additional Health Aide Services</b>		
Does the student need Health Aide services that are not a Medicaid reimbursable ADL such as reinforcement of therapy, education or academic needs, or behavior?		
_____ [PDF]		
8a. If yes, does the SFD in the IEP separate time for these activities from the Medicaid reimbursable ADLs?		
_____ [PDF]		
<b>Confirmation</b>		
LEA qualified representative first and last name (print):	Title:	Date of Signature:
_____	_____	_____ [PDF]

Figure 2-138 Health Aide Prepayment Review Form Screen

To create a Health Aide Prepayment Review Form document:

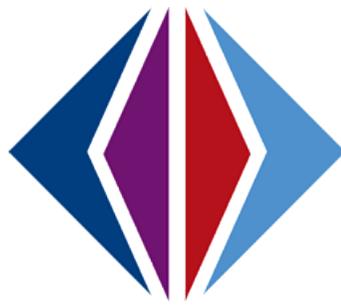
1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Complete Contact Information including Contact name:, Contact e-mail:, Job title:, and Contact telephone number:.
3. Complete Student IEP Information including **AHCCCS ID** (if this field is available), **Start date of IEP:** and **End date of IEP:** (MMDDYY) or click  and select date.



**Note:** If amendment is related to Health Aide services, please use the effective date of the amendment as the IEP start date.

4. Enter the Number of health aide minutes per day requested:.
5. List Name(s), Position, and Certification of Qualified Medical Provider(s) That Signed the IEP and Recommended Activities of Daily Living (ADL) in the appropriate spaces provided. The list of possible qualified medical providers follows:  
Audiologist, Licensed Clinical Social Worker (LCSW), Licensed Marriage and Family Therapist (LMFT), Licensed Professional Counselor (LPC), Occupational Therapist, Physical Therapist, Psychiatrist, Psychologist, School Based Guidance Counselor, School based Licensed Practical Nurse (LPN), School Based School Psychologist, School Based Registered Nurse (RN), Speech-Language Pathologists (SLP)
6. Check only the Medicaid Reimbursable Activities of Daily Living (ADL) that have been prescribed for the student.
7. List the page number(s) of the IEP that demonstrate the qualified medical provider is recommending need for the ADL(s) that were identified above. Remember to highlight relevant sentences in attached copy of the IEP.
8. List the page number(s) of the IEP that clearly state the scope, frequency, and duration (SFD) of Medicaid allowable services to be provided by a health aide. Remember to highlight SFD in attached copy of the IEP.
9. Click the drop-down under Does the student need Health Aide services that are not a Medicaid reimbursable ADL such as reinforcement of therapy, education or academic needs, or behavior? and select Yes or No.
10. If Yes is selected, click the drop-down under 8a. If yes, does the SFD in the IEP separate time for these activities from the Medicaid reimbursable ADL? and select Yes or No.
11. Enter the Local Education Agency (**LEA**) **qualified representative first and last name (print):** If this document has already been printed out, make sure to print this person's name.
12. Enter their **Title:**
13. Enter the **Date of Signature:** (MMDDYY) or click  and select date.
14. Click .

The document can be [printed](#), [validated](#) and [finalized](#).



# Chapter Three: PROCESS DOCUMENTS

In this chapter, the following topics are covered:

- ▶ What SE Process Documents are available
- ▶ How to create, save, validate and finalize specific documents

## PROCESS DOCUMENTS

GENAZ 01	Referral
GENAZ 02	Notice of Referral
GENAZ 03	Parent Input
GENAZ 04	Notice of Evaluation Decision
GENAZ 05	Parent Permission
GENAZ 06	Multidisciplinary Evaluation Team (MET)
GENAZ 07	MET Meeting Request
GENAZ 08	Notice of Eligibility
GENAZ 09	IEP Meeting Request
GENAZ 10	Notice of Placement
GENAZ 11	Notice of IEP
GENAZ 12	IEP
GENAZ 13	Notice of Placement
GENAZ 14	Notice of IEP
GENAZ 15	Notice of Reeval Waiver
GENAZ 16	Notice of Referral
GENAZ 17	Notice of Reevaluation Decision
GENAZ 18	Notice of Triennial
GENAZ 19	Notice of Test Intent
GENAZ 20	Notice of Termination
GENAZ 21	Notice of Continued Placement
GENAZ 22	Notice of IEP

GENAZ 23	Notice of Transfer
GENAZ 24	Transfer IEP
GENAZ 25	Notice of Referral (Preschool)
GENAZ 26	Notice of Evaluation Decision (Preschool)
GENAZ 27	Notice of Placement (Preschool)
GENAZ 28	Notice of IEP (Preschool)

**ELIGIBILITY DETERMINATION DOCUMENTS**

GENAZ 56	Eligibility Determination	Autism
GENAZ 57	Eligibility Determination	Emotional Disability
GENAZ 58	Eligibility Determination	Hearing Impairment
GENAZ 59	Eligibility Determination	Intellectual Disability
GENAZ 60	Eligibility Determination	Multiple Disabilities / SSI
GENAZ 61	Eligibility Determination	Other Health Impairment
GENAZ 63	Eligibility Determination	Orthopedic Impairment
GENAZ 64A	Eligibility Determination	Developmental Delay
GENAZ 64	Eligibility Determination	Preschool Severe Delay
GENAZ 65	Eligibility Determination	Specific Learning Disability
GENAZ 66	Eligibility Determination	Speech/Language Impairment
GENAZ 67	Eligibility Determination	Traumatic Brain Injury
GENAZ 68	Eligibility Determination	Visual Impairment
GENAZ 69	Eligibility Determination	Non Eligible Child

## GENAZ 01 – REFERRAL

The Referral is located in the Initial and Reevaluation Process.

The Referral contains seven tabs. The tabs include:

- Reason for Referral
- Interventions
- Attendance History
- Cultural Factors
- Standardized Testing
- Student Performance
- Health

The screenshot shows the 'Reason for Referral' tab in a web application. At the top, it displays 'Student Name: Aaron, Ian', 'Document: GENAZ 01', and 'Description: Referral'. Below this are several tabs: 'Reason for Referral' (highlighted with a red box), 'Interventions', 'Attendance History', 'Cultural Factors', 'Standardized Testing', 'Student Performance', and 'Health'. The main content area includes a 'Document Name' field with 'Referral' entered and a 'Document Date' field. Below that is the 'Arizona English Language Learner Assessment (AZELLA)' section with 'Scaled Score' and 'Performance Level' fields. The 'Reason for Referral' section contains a 'Referral Source Type' dropdown, a 'Referred By' text field, and a 'Reason For Referral' text area with a 'Speech Only' checkbox. There are also 'Student Strengths' and 'Areas of Concern' sections. The 'Areas of Concern' section includes a 'Reading' list of checkboxes and a 'Reading Other' checkbox.

Figure 3-1 Referral Screen Reason for Referral Tab

To create a Referral document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

### REASON FOR REFERRAL TAB

2. Enter the AZELLA scores, if applicable, for the student. The **Scaled Score** field accepts numerical data only.
3. Click the **Referral Source Type** drop-down and select.

4. Type the name of the person who referred the student in the **Referred By** text box. The data in this field will import to GENAZ 05 Parent Permission in addition to GENAZ 06 – MET Report/Referral Tab.
5. Type the reason the student was referred in the **Reason For Referral** textbox. The data in this field will import to GENAZ 05 Parent Permission in addition to GENAZ 06 – MET Report/Referral Tab.
6. If the student is being referred for speech only concerns, place a checkmark in the **Speech Only** checkbox.
7. Type strengths of the student in full sentences in the **Student Strengths** textbox. The data in this field will import to GENAZ 06 – MET Report.

Areas of Concern contain a series of statements that are to be checked if the area is of concern for the student. Only the selected statements will appear on the printable Referral document. The data in this field will import to GENAZ 06 – MET Report/Referral Tab.

Each area has an “Other” textbox available for listing items not included in the checkbox list. The data in this field will import to GENAZ 06 – MET Report/Referral Tab.

### INTERVENTIONS TAB

1. Indicate in the **Interventions** textbox which interventions have been implemented for at least four weeks. The data in this field will import to GENAZ 06 – MET Report/Existing Data Tab.

The screenshot shows a software interface for a 'Referral' document. At the top, it displays 'Student Name: Aaron, Ian', 'Document: GENAZ 01', and 'Description: Referral'. Below this are several tabs: 'Reason for Referral', 'Interventions' (which is highlighted with a red box), 'Attendance History', 'Cultural Factors', 'Standardized Testing', 'Student Performance', and 'Health'. Under the 'Interventions' tab, there is a text area with the instruction '(Please indicate which interventions have been implemented for at least four weeks.)' and a list of interventions, each with a checkbox. A small icon in the bottom right corner of the text area indicates it can be resized.

Figure 3-2 Referral Screen Interventions Tab



**Tip:** When entering, editing or viewing information in a textbox, grab  in the bottom right corner, to resize the box. The box can be adjusted larger to view more of the information or smaller to provide more room on the screen.

### ATTENDANCE HISTORY TAB

The student's attendance history imports from Synergy SIS. This history will only display attendance from the current school district. The data in this field will import to GENAZ 06 – MET Report/Existing Data Tab.

Referral

Student Name: **Aaron, Ian** Document: GENAZ 01 Description: Referral

Reason for Referral Interventions **Attendance History** Cultural Factors Standardized Testing Student Performance Health

Document Name: Referral Document Date: [ ]

**Attendance History**

Line	Year	Grade	School Location	Absences	Significant Information
1	2012	04	Adams Elementary	37	

Refresh From Attendance

Figure 3-3 Referral Screen Attendance History Tab

1. Significant Information can be added in the textbox. Use to spellcheck. Use for more space.

If additional school years need to be added:

2. Click the **Add** button to display a new row.
3. Enter the school **Year**, **Grade**, **School Location** and **Absences** in the spaces provided. **Significant Information** can also be added to this row.

4. If needed, check on the line of the record to remove. The row is removed.

### CULTURAL FACTORS TAB

Referral

Student Name: **Aaron, Ian** Document: GENAZ 01 Description: Referral

Reason for Referral Interventions Attendance History **Cultural Factors** Standardized Testing Student Performance Health

Document Name: Referral Document Date: [ ]

**Cultural Factors**

Cultural Factor

There is no evidence of lack of instruction in reading and math (including excessive absences and/or frequent moves).

There is no evidence that race, limited English proficiency, or socio-economic status have contributed to the student's learning difficulties.

The following cultural factors (race, limited English proficiency, or socio-economic status) may have impacted the student's academic progress:

Please describe any cultural factors which may affect student's achievement and behavior

Figure 3-4 Referral Screen Cultural Factors Tab

1. Determine if there were **Cultural Factors** that had an impact on the student's academic progress and check the appropriate statement(s).
2. If the third statement is selected, describe those factors in the textbox below. Use to spellcheck. Use for more space.

### STANDARDIZED TESTING TAB

The Standardized Testing contains tests used by the school district. The data from this tab will import to GENAZ 06 – MET Report/Existing Data Tab.

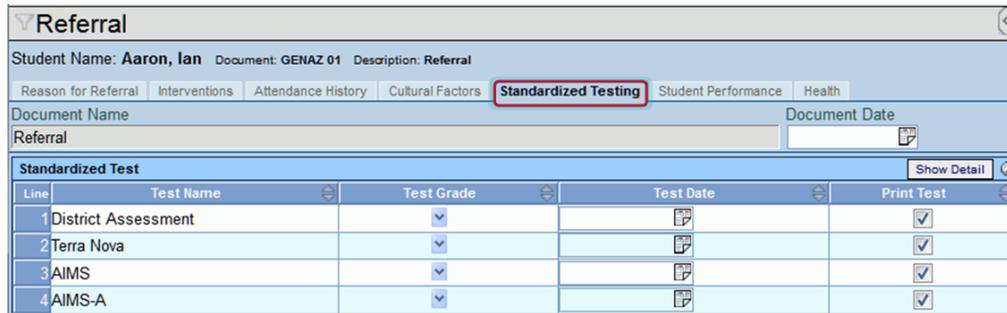


Figure 3-5 Referral Screen Standardized Testing Tab

Standardized Tests cannot be removed but can be set to not print on the printable documents.

1. Click the checkmark (uncheck) in the **Print Test** column of the test rows that will not be used.

To add Standardized Test data:

2. Click the **Show Detail** button
3. Select the **Test Name** by clicking on the test name line.
4. Add the grade from the **Test Grade** drop-down.
5. Enter the **Test Date** (MMDDYY) or click  and select date.
6. Add **Test Scores** by clicking on the Add button in the Test Scores group box.
7. If needed, check  on the line of the **Test Score** to remove. The row is removed.
8. Click  before updating another test.
9. Click another **Test Name** and repeat the steps above, to update that test information, if desired.

### STUDENT PERFORMANCE TAB

The Student Performance section allows for evaluation data to be entered for each of the student’s subject areas. The data from this tab will import to GENAZ 06 – MET Report/Existing Data Tab and GENAZ 12 – IEP/PLAAFP Tab.



Figure 3-6 Referral Screen Student Performance Tab

1. Click the **Add** button to add a **Student Evaluation Report**.
2. Click  next to the **Teacher Name**. The Find: Staff screen displays.

Find: Staff			
Find Criteria			
Last Name	First Name	Middle Name	
Smith	C		
Search Results			
Find Result			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-7 Find: Staff Screen

3. Enter all or part of the **Last Name, First Name**.
4. Click  or press **ENTER**. Search Results displays a list of matching criteria.
5. Click line of teacher name. Line highlights.
6. Click again or click . Find: Staff screen closes and the teacher name displays.
7. Select the subject from the Subject drop-down. If the subject needed does not appear in the drop-down list, the desired subject can be typed into the Other Subject text box.
8. Click the **Show Detail** button. (You may be prompted to save your changes before you can show detail.) A detailed screen displays on the right.
9. Select only that which is applicable for this student. Items not selected do not appear on the printable document.
10. Click  before adding another **Student Evaluation Report**.
11. Repeat the steps above to add another **Student Evaluation Report**, if desired. Up to seven subject areas may be added.
12. If needed, check  on the line of the **Student Evaluation Report** to remove. The row is removed.

## HEALTH TAB

Vision and Hearing results for the student will import from Synergy SIS, however, existing results can be edited or new results can be added to the Health view. The data from this tab will import to GENAZ 06 – MET Report/Existing Data Tab.

The screenshot shows the 'Referral' screen with the 'Health' tab selected. The document is for 'Aaron, Ian' (GENAZ 01). The 'Health' tab contains the following sections:

- Vision Results:** A table with columns for 'Without Glasses' and 'With Glasses', each with sub-columns for 'Right Eye', 'Left Eye', and 'Both Eyes'. A single row is shown with a screen date of 01/30/2012 and results of 20/20 for all categories.
- Hearing Results:** A table with columns for 'Right Result' and 'Left Result'. A single row is shown with a screen date of 02/25/2013 and results of 'P' for both.
- Comments:** A text area for entering notes.
- Health Issues:** A text area for entering health-related information.
- Medications:** A text area for entering medication information.

Figure 3-8 Referral Screen Health Tab

1. Click the **Add** button on the Vision Results bar to add a vision record.
2. Enter a Screen Date (MMDDYY) or click  and select date.
3. Enter the results by clicking the drop-downs across the row and selecting the appropriate scores for each result.
4. Enter any Comments that might be appropriate about the vision screening, such as: Student has a prescription for eye glasses but does not wear them or has lost them. Use  to spellcheck. Use  for more space.
5. If needed, check  on the line of the **Vision** record to remove. The row is removed.
6. Repeat the above instructions to add a **Hearing Results** record.
7. Enter any appropriate **Health Issues** and **Medications** in the textboxes provided. The Health Issues and Medications textboxes are for the Referral information, only, and do not import into any other Synergy SE document.
8. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 02 – NOTICE OF REFERRAL

The Notice of Referral is located in the Initial and Reevaluation Process.



**Note:** The Notice of Referral has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Referral contains one tab:

- **Prior Written Notice**

Figure 3-9 Notice of Referral Screen

To create a Notice of Referral document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

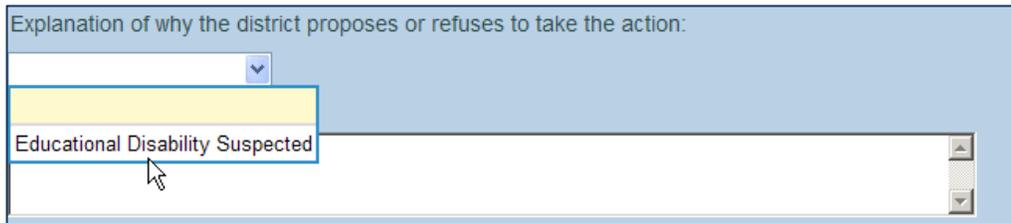


Figure 3-10 Notice of Referral Screen Statements Section Drop-down

2. Click on the drop-down box located above the textbox.
3. Select the desired key-word stem in the drop-down list.
4. The statement associated with the key-word stem selected will appear in the textbox. Use to spellcheck. Use for more space.

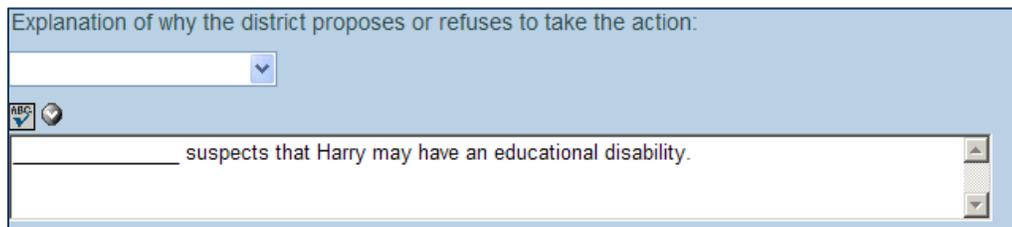


Figure 3-11 Notice of Referral Screen Statements Section Populated

5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click next to **This document was prepared by:.** The Find: Staff screen displays.
8. Enter all or part of staff Last Name, First Name.
9. Click or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.

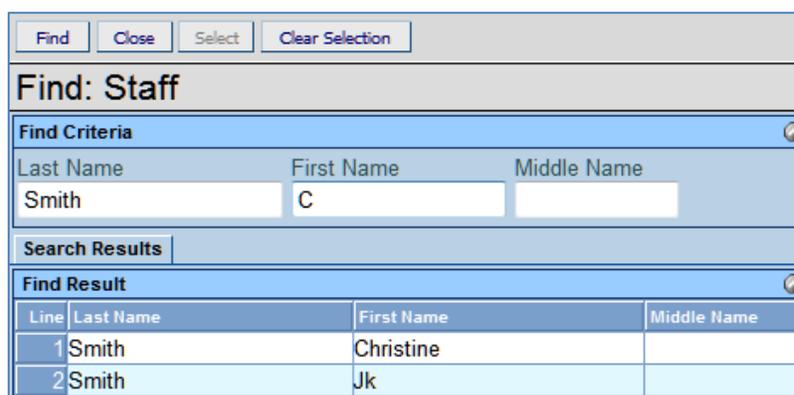


Figure 3-12 Find: Staff Screen

11. Click again or click . Find: Staff screen closes and staff name displays.
12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 03 – PARENT INPUT

The Parent Input is located in the Initial, Reevaluation and Preschool Process.

There are two versions of the Parent Input: K-12 and Preschool. If a student is in grade K-12, they will have the K-12 version of the Parent Input document. If a student is in grade Preschool, the additional preschool options will be available in their Parent Input document.

The K-12 version of Parent Input contains four tabs. The tabs include:

- **Family Information**
- **Educational Information**
- **Medical/Development/Health Information**
- **Functional Information**

The Preschool version of Parent Input contains an additional tab:

- **Preschool**

**Parent Input**

Student Name: **Akina, Shawn E.** Document: **GENAZ 03** Description: **Parent Input**

**Family Information** | Educational Information | Medical/Development/Health Information | Functional Information

Document Name: **Parent Input** Document Date: [ ]

Input Type: [ ]  Use Abbreviated Form

The following questions concern your child's development and functioning within your family. Your answers will provide us with information as part of the comprehensive/confidential evaluation. This will be useful in understanding factors which have had an influence on your child's growth and achievement in school. Thank you for your cooperation in completing this form.

**Family Information**

With whom does the child live (Specify: Biological parents, adoptive parents, etc.)

Legal Guardian: [ ]

Natural Father: [ ] Father's Occupation: [ ]

Health Problems - Father: [ ] Level of Education - Father: [ ]

Natural Mother: [ ] Mother's Occupation: [ ]

Health Problems - Mother: [ ] Level of Education - Mother: [ ]

How many children in family household: [ ] Ages of children: [ ]

Please check if either of this child's natural parents, or immediate family members, have experienced any of the following, which could have contributed to your child's school difficulties:

alcohol addiction  psychological / psychiatric evaluation

drug addiction  seizures

learning disabilities / problems  speech or language disorder

mental illness  violence / abuse

mental retardation  other

other special education disabilities

physical disability

Details [ ]

Figure 3-13 Parent Input Screen Family Information Tab

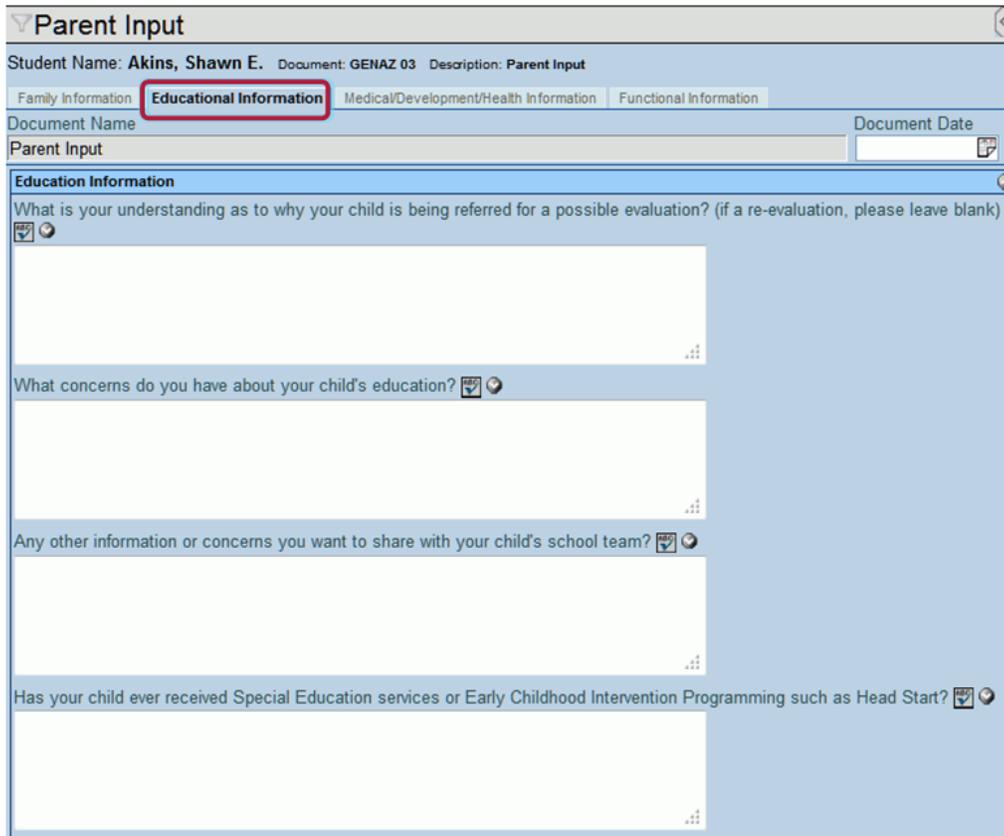
To create a Parent Input document:

### FAMILY INFORMATION TAB

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Select the **Input Type** by selecting the appropriate choice from the drop-down menu.
3. The **Use Abbreviated Form** checkbox gives the user the option of a shorter form. By checking this option, sections under Educational Information and Medical/Development/Health Information will be hidden from view.
4. The Family Information section asks questions about the parents and siblings. Enter data in the With whom does the child live, Legal Guardian, Father and Mother Occupation and Father and Mother Health Problems.
5. The **Natural Father** and **Natural Mother** fields are drop-down boxes that display the guardians listed for this student as they appear in Synergy SIS. Select the appropriate option in the drop-down list.
6. Enter **How many children in family household** and the **Ages of children**. The data in this field will import to GENAZ 06 – MET Report/Existing Data Tab.
7. Check any issues that might contribute to student difficulties. **Details** can be added in the textbox. Use  to spellcheck. Use  for more space.

### EDUCATIONAL INFORMATION TAB

The Educational Information tab contains four questions that are to be answered by the parent during the parent interview.



**Parent Input**

Student Name: Akins, Shawn E. Document: GENAZ 03 Description: Parent Input

Family Information **Educational Information** Medical/Development/Health Information Functional Information

Document Name: Parent Input Document Date: 

**Education Information**

What is your understanding as to why your child is being referred for a possible evaluation? (if a re-evaluation, please leave blank)  

What concerns do you have about your child's education?  

Any other information or concerns you want to share with your child's school team?  

Has your child ever received Special Education services or Early Childhood Intervention Programming such as Head Start?  

Figure 3-14 Parent Input Screen Educational Information Tab

Data that exists in “**What is your understanding as to why your child is being referred...?**” will import to GENAZ 06 – MET Report/Existing Data Tab. Data that exists in “**What concerns do you have about your child’s education?**” will import to GENAZ 06 – MET Report/ Existing Data Tab and GENAZ 12 – IEP/PLAAFP Tab.

1. Complete the textboxes. Use  to spellcheck. Use  for more space.

### MEDICAL/DEVELOPMENTAL/HEATH INFORMATION TAB



**Tip:** When entering, editing or viewing information in a textbox, grab  in the bottom right corner, to resize the box. The box can be adjusted larger to view more of the information or smaller to provide more room on the screen.

**Parent Input**

Student Name: **Akins, Shawn E.** Document: GENAZ 03 Description: Parent Input

Family Information | Educational Information | **Medical/Developmental/Health Information** | Functional Information

Document Name: Parent Input Document Date:

**Prenatal/Birth/Infancy History**

Mother's age at child's birth:

Did the mother visit doctor regularly during pregnancy?

Was there any difficulty during the pregnancy?

If yes, please explain:

Did the mother take medication during pregnancy?

If yes, please list:

Did the mother receive anesthesia during delivery?

If yes, please list:

Did mother smoke during the pregnancy?

Did mother use alcohol during pregnancy?

Figure 3-15 Parent Input Screen Medical/Developmental/Health Information Tab

The first section of the Medical/Developmental/Health Information tab consists of Prenatal, Birth and Infancy History. The data in this section will import into GENAZ 06 – MET Report/ Existing Data Tab.

1. Answer the questions in the **Yes/No** drop-down boxes. Add additional information (if applicable) in the textboxes provided. Use  to spellcheck. Use  for more space.

The Developmental History section consists of questions regarding early development.

Figure 3-16 Parent Input Screen Medical/Developmental/Heath Information Tab Dev. History

2. The first drop-down has two choices available. If the first option: **Parent indicated the following areas of developmental delays:** is selected, complete the remaining drop-downs in the section.

OR

If the second option: **Parent reports developmental milestones were within normal parameters:** is selected, the drop-downs in the section may be skipped.

The data in the Medical History section will import into GENAZ 06 – MET Report/ Existing Data Tab. The Medical History section contains a checklist of possible Medical Difficulties that the student may have experienced.

	Yes/No	Description
According to the health history, student has had no serious illnesses or injuries.		
According to the health history, student has experienced the following difficulties		
1 Significant illness:		
2 Serious accident:		
3 Surgery/Hospitalization:		
4 Seizure:		

Figure 3-17 Parent Input Screen Medical/Developmental/Heath Information Tab Parent Input

3. The first drop-down has two choices available. If the first option: **According to the health history, student has had no serious illnesses or injuries:** is selected, this statement will appear in the MET Report. Continue on to answer **Yes** or **No** from any of the drop-downs that may apply.

OR

If the second option: **Parent reports developmental milestones were within normal parameters:** is selected, this statement will appear in the MET Report. Continue on to answer **Yes** or **No** from any of the drop-downs that may apply. Only items addressed with **Yes** or **No** will import to the MET Report/ Existing Data Tab and IEP/Medical Tab.

### FUNCTIONAL INFORMATION TAB

The Functional Information Tab consists of a checklist of items that might describe the student.

**Parent Input**

Student Name: **Akins, Shawn E.** Document: **GENAZ 03** Description: **Parent Input**

Family Information Educational Information Medical/Development/Health Information **Functional Information**

Document Name: **Parent Input** Document Date: [ ]

**Functional Information**

Please check the following that describe your child:

<input type="checkbox"/> participates in family activities	<input type="checkbox"/> gets along well with others
<input type="checkbox"/> is affectionate	<input type="checkbox"/> participates in outside activities, e.g., clubs, performing arts
<input type="checkbox"/> has a good self-image	<input type="checkbox"/> has mood swings
<input type="checkbox"/> has a poor attention span	<input type="checkbox"/> has a poor memory
<input type="checkbox"/> lies	<input type="checkbox"/> steals
<input type="checkbox"/> frustrates easily	<input type="checkbox"/> acts without thinking
<input type="checkbox"/> has temper tantrums	<input type="checkbox"/> becomes angry often
<input type="checkbox"/> is aggressive	<input type="checkbox"/> experiences excessive sadness
<input type="checkbox"/> is withdrawn	<input type="checkbox"/> has made suicide threats

Is there any other information about your child that you would like to share? [ ] [ ]

[ Save ]

Figure 3-18 Parent Input Screen Functional Information Tab

1. Items checked from this section as well as data entered into the textbox will import into GENAZ 06 – MET Report/ Existing Data Tab.
2. A textbox for additional information is also available. Use  to spellcheck. Use  for more space.
3. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 04 – NOTICE OF EVALUATION DECISION

The Notice of Evaluation Decision is located in the Initial Process.

The Notice of Evaluation Decision provides two options:

- **Decision to Evaluate:** If this option is selected, the document will be created and finalized and the student will remain in the Initial process.
- **Decision to *NOT* Evaluate:** If this option is selected, the document will be created and finalized and the student will be exited from Synergy SE. The notice and all other previously created documents will move to the student's historical documents.

[\(See: Documents With Unique Functionality\)](#)



**Note:** The Notice of Evaluation Decision has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Evaluation Decision contains one tab:

- **Prior Written Notice**

**Prior Written Notice**

Student Name: **Abbott, Billy C.** Document: **GENAZ 04** Description: **Notice of Evaluation Decision**

**Prior Written Notice**

Document Name: **Notice of Evaluation Decision** Document Date:

**Decision**

Current Decision: **Evaluate** [Change Decision To "Not Evaluate"](#)

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: **Evaluation**  
 The Multidisciplinary Evaluation Team (MET) has decided to collect additional data on your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
 (initials)

This document was prepared by:  
 **Admin User**

Case Manager:  Case Manager Phone:   
 User, Admin  481-123-4578

Figure 3-19 Notice of Evaluation Screen

To create a Notice of Evaluation Decision document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. The Notice of Evaluation opens in Evaluate mode. To change the decision click [Change Decision To "Not Evaluate"](#). Current Decision will display **Not Evaluate**.
3. The Current Decision can be changed back to Evaluate by clicking [Change Decision To "Evaluate"](#).

Based on the decision made above the document will display the appropriate text in the Statement fields and drop-down selections.

There are four statement areas for the explanations of action taken. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly into the textboxes.

4. Click on the drop-down box located above the textbox.

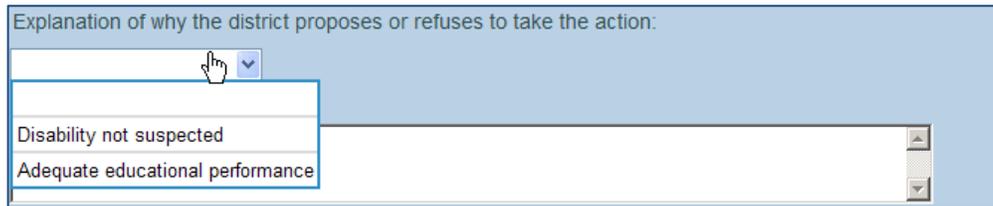


Figure 3-20 Notice of Evaluation Screen Sentence Stem Drop-down

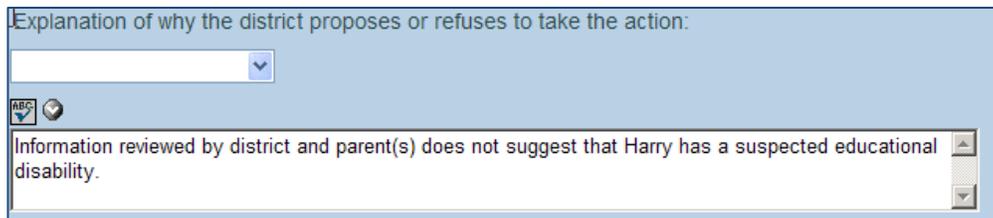


Figure 3-21 Notice of Evaluation Screen Inserted Statement

5. Select the desired key-word stem in the drop-down list.
6. The statement associated with the key-word stem selected will appear in the textbox. The statement can then be edited and spell checked if desired.
7. Enter the **This decision is proposed to be implemented on:** date (MMDDYY) or click  and select date.
8. Enter **(initials)** to signify that the Procedural Safeguards were provided to parent.
9. Click  next to the **This document was prepared by:** to select the staff name. The Find: Staff screen displays.

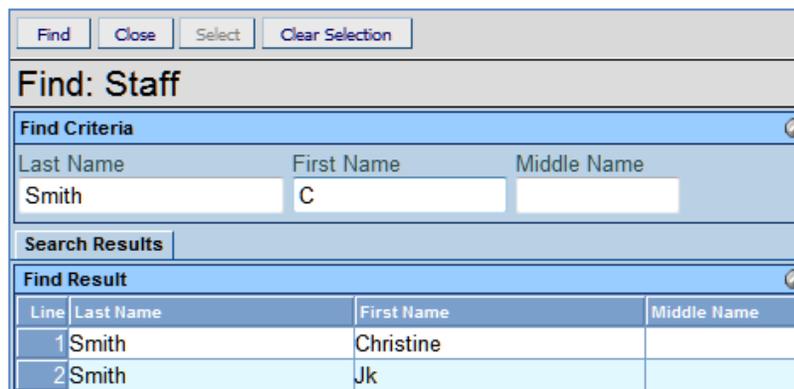


Figure 3-22 Find: Staff Screen

10. Enter all or part of staff **Last Name, First Name**.
11. Click  or press ENTER. Search Results displays a list of matching criteria.
12. Click line of staff name. Line highlights.
13. Click again or click . Find: Staff screen closes and staff name displays.

14. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

If the option selected on this Notice was to *NOT* Evaluate, all previously created documents for this student will move to the Historical Documents tab and the student will be removed from your Portfolio. If the student is ever referred for another evaluation they can be pulled back into the Initial Process.

Once [finalized](#), a Student Exit from Special Ed screen will display.

1. The **Exit Date** will default to the current date and can be changed using the Calendar Icon.
2. Select the **Exit Reason** from the statements available in the drop-down box and type in the **Exit Explanation**.
3. Click the **Exit from Special Ed** button. A **Cancel** button is available if you are not ready to exit the student, yet. If the cancel option is selected, the document will remain not finalized and in the *In Progress* state.

## GENAZ 05 – PARENT PERMISSION

The Parent Permission is located in the Initial, Reevaluation and Preschool Process.

Creating a Parent Permission document will generate a cover letter as well as a request for parent permission to evaluate the student.

The Parent Permission consists of two tabs. The tabs include:

- **Parent Permission**
- **Evaluation**

The screenshot shows a web application interface for creating a Parent Permission document. At the top, there's a title bar "Parent Permission" with a back arrow. Below it, a header area shows "Student Name: Sabin, Heather R.", "Document: GENAZ 05", and "Description: Parent Permission". There are two tabs: "Parent Permission" (selected and highlighted in red) and "Evaluation". The main content area is divided into sections: "Document Name" with a text field containing "Parent Permission", "Document Date" with a date picker icon, and a large text area containing a pre-written cover letter. The cover letter starts with "Dear Parent/Guardian/Adult Student:" and discusses the evaluation process. It includes a contact information field with a redacted name and phone number. The letter ends with "Sincerely, Special Education Department, Edupoint School District".

Figure 3-23 Parent Permission Screen Parent Permission Tab

To create a Parent Permission document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

## PARENT PERMISSION TAB

The Parent Permission section of the document is a cover letter that will print out as a separate page.

- Complete the cover letter by filling in the contact name and phone number. This information will import into the Evaluation section of this document.

## THE EVALUATION TAB

**Parent Permission**

Student Name: Sabin, Heather R. Document: GENAZ 05 Description: Parent Permission

Parent Permission **Evaluation**

Document Name: Parent Permission Document Date: [ ]

**Evaluation**

In order to best meet the individual needs of the student, it is recommended that the student be individually evaluated by Edupoint School District personnel. This evaluation is being proposed because: Heather was referred by [ ]

Due to: [ ] Refresh From Referral

To determine potential eligibility or continued eligibility for Special Education services, an evaluation will be conducted by a multidisciplinary team.

**THIS EVALUATION WILL INCLUDE (see checked areas below):**

THIS EVALUATION WILL INCLUDE (see checked areas below):

- A vision/hearing screening: Screening of any visual or hearing problems that would interfere with testing or school performance.
- Child's academic history and current educational functioning: Review of your child's prior school records and current level of achievement in the present educational setting.
- An educational evaluation of learning and achievement: Tests to measure academic skills taught in school.
- An assessment of your child's learning environment: Observations of student's interaction in the classroom environment, including physical environment and learning style.
- A summary of your child's medical history and current health status: Information to determine if any current or past medical problem is having a significant impact on your child's school performance.
- Parent input regarding their child's health, development and educational history: information provided by parents through survey, interview or records from other agencies (e.g. medical).
- Psychological evaluation: To determine student's functioning level in the areas of intelligence, visual-motor coordination, social/emotional development, functional behavior, and/or academic achievement. Formal and informal assessment procedures are included.
- Language evaluation: To determine student's proficiency levels in the areas of receptive and expressive language abilities as well as functional communication skills. Language proficiency is assessed for bilingual students.
- Speech evaluation: To determine the nature and extent of student's speech abilities, including such skills as articulation of speech sounds, voice, and/or fluency.
- An assessment of your child's adaptive behavior: An assessment of your child's in-school and out-of-school behavior and how the environment affects your child's ability to learn, including adaptive behavior (how your child functions independently and meets standards of personal and social responsibility) and cultural background.
- Related services evaluation: To determine eligibility for additional services required for student to benefit from special education.

Other Assessments (specify): [ ]

**This portion to be completed by Parent(s)/Guardian(s)**

Upon completion of the team's evaluation, a conference will be scheduled with you to communicate the team's findings and recommendations. The student's educational placement will not change during the evaluation process. If you have any questions or wish to discuss the evaluation process, please call [ ] at phone [ ]

I hereby give consent for Edupoint School District personnel to conduct the evaluation described and I participated in the team decision that further assessment of the student is necessary.

Consent for the evaluation is hereby denied.

Please return this form to: [ ] Phone: [ ] Consent Received Date: [ ]

Figure 3-24 Parent Permission Screen Evaluation Tab

The student's name will automatically import into the name field.

The **Referring Name** and the **Reason for Referral** should automatically appear in the referred by field and the **Due to:** field. This data is pulled from the Referral document. If these fields are empty it is because the Permission to Test document was created or clicked on prior to the data being added to the Referral.

- To import the data, click [Refresh From Referral](#). The data from the Referral will import into the textboxes.



**Caution:** If any text has been manually added to the fields prior to clicking the Refresh button, the data will be over-written with the imported data.

4. Select the areas to be included in the student's evaluation by placing a checkmark in the box provided.
5. If a specific evaluation isn't available in the above list, it can be added in the text box below the list of evaluations titled **Areas to be assessed include:**.

The portion to be completed by Parent(s) Guardian(s) section will pull the contact information from the cover sheet.

6. The checkbox area is for the parent to consent or deny permission.
7. Fields are provided to enter a name and number of the person who will receive the form from the parent.
8. Click .

### CREATING ADDITIONAL PARENT PERMISSION DOCUMENTS

In cases where additional attempts are made to contact the parent to receive permission for evaluation, multiple Parent Permission documents may need to be created. Before an additional Parent Permission document can be created, the previous document must be finalized.

9. Click on the green icon that represents the finalized Parent Permission document. The DocumentViewList view will open displaying the previously finalized Parent Permission document.



Figure 3-25 Finalized Parent Permission Icon

10. Click . A new Parent Permission will open.

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 06 – THE MET REPORT

The MET (Multidisciplinary Evaluation Team) Report is located in the Initial, Reevaluation and Preschool Process.

### REFRESH BUTTONS

The MET Report Action Bar contains three Refresh buttons, Refresh from Parent Input and Refresh from Referral located at the top of the document. Refresh Participants from Team is located in the MET Participants section.



Figure 3-26 MET Report Action Bar

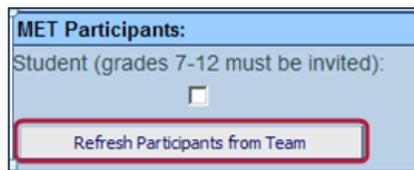


Figure 3-27 MET Screen Participants Refresh

When the **Refresh** buttons are clicked, a confirmation dialog box displays. Once confirmed, data from specified fields in the previous document will import into the MET Report.

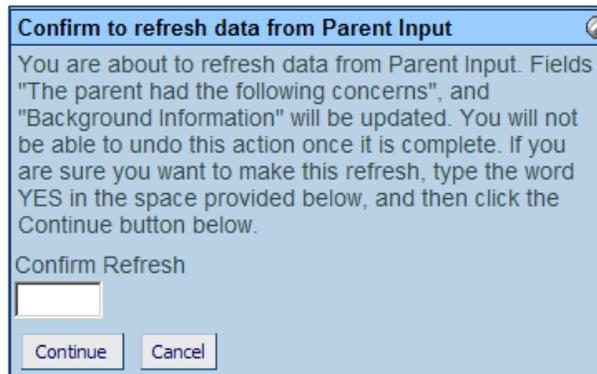


Figure 3-28 MET Confirm Refresh Message



**Caution:** If any text has been manually added to the fields prior to clicking the Refresh button, the data will be over-written with the imported data.

The Met Report contains six tabs. The tabs include:

- **Cover**
- **Referral**
- **Existing Data**
- **Additional Data (Available based on decision made in Existing Data Tab)**
- **Eligibility**
- **Additional Information**
- **Attachments**

**COVER TAB**

**MET**

Student Name: \_\_\_\_\_ Document: GENAZ 06 Description: Multidisciplinary Evaluation Team (MET)

**Cover** Referral Existing Data Eligibility Additional Information Attachments

Document Alias \_\_\_\_\_ Display 'DRAFT'

MET Date: \_\_\_\_\_ Student is not eligible, Reevaluation is Not Applicable: Three Year Reevaluation Due Date: \_\_\_\_\_ Type of Evaluation: \_\_\_\_\_

Eligibility:

**Medical**

**Vision Results:** Add Show Detail

Line	Screen Date	Results					
		Without Glasses			With Glasses		
		Right Eye	Left Eye	Both Eyes	Right Eye	Left Eye	Both Eyes
1							

Comments \_\_\_\_\_

**Hearing Results:** Add

Line	Screen Date	Right Result	Left Result
1			

Comments \_\_\_\_\_ Refresh From Health Screen

**MET Participants:**

Student (grades 7-12 must be invited): \_\_\_\_\_

Refresh Participants from Team

**Parent Participants**

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Participant
1					<input type="checkbox"/>
2					<input type="checkbox"/>

**Staff Participants** Add

Line	Staff Name	Role
1	Admin User	Case Carrier
2	Cissy Horn	Speech/Language Therapist

**Other Participants** Add

Line	Name	Job Title	Role
------	------	-----------	------

Figure 3-29 MET Report Screen Cover Tab

To create a MET Report document:

1. Check **Draft** to display the word "Draft" on all pages of the document in the Print Preview option. Make sure to uncheck prior to finalizing the MET report.
2. Enter the **MET Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
3. If Student is not eligible, Reevaluation is Not Applicable is checked, the Three Year Reevaluation Due Date field will be blocked.

**Three Year Reevaluation Due Date** will calculate from the **MET Date** by adding three years, minus one day to the next **Reevaluation Due Date**.

4. Select **Type of Evaluation** from the drop-down list.
5. Indicate area(s) of **Eligibility** in the textbox provided.
6. Click the **Add** button on the Vision Results bar to add a vision record.
7. Enter a **Screen Date** (MMDDYY) or click and select date.
8. Enter the results by clicking the drop-downs across the row and selecting the appropriate scores for each result.

9. Enter any **Comments** that might be appropriate about the vision screening, such as: Student has a prescription for eye glasses but does not wear them or has lost them. Use  to spellcheck. Use  for more space.
10. If needed, check  on the line of the **Vision** record to remove. The row is removed.
11. Repeat the above instructions to add a **Hearing Results** record.
12. If this document was created prior to the Medical and Hearing Results being entered click  to import the data.

MET Participants

1. Click  to pull the participants from the student's current Team List. Participant changes can be made directly to this document, as well.
2. Check **Student** to include the student's name, with a signature line, as a participant in the MET conference. If the checkbox is left blank the name will not be included as a participant.
3. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Staff			Add
X	Line	Staff Name	Role
<input type="checkbox"/>	1	<a href="#">Green, Tom</a> ←	Case Carrier
<input type="checkbox"/>	2	<a href="#">User, Admin</a> ←	Teacher Specialist

Figure 3-30 MET Report Screen Cover Tab Staff Section Change/Add

Change current staff names:

1. Click ← next to the **Staff Name** to change. The Find: Staff screen displays.

Find   Close   Select   Clear Selection

**Find: Staff**

**Find Criteria**

Last Name	First Name	Middle Name
Smith	C	

**Search Results**

**Find Result**

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-31 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.

6. Click the **Role** drop-down and select the staff role.

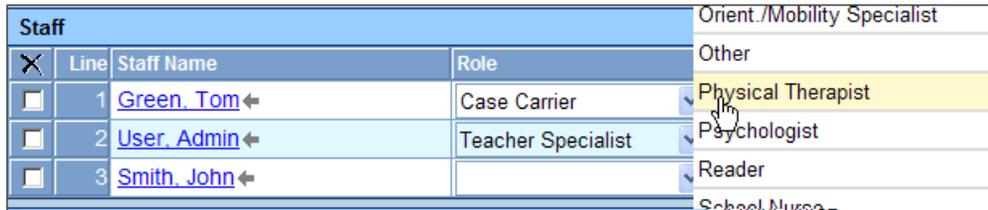


Figure 3-32 MET Report Screen Cover Tab Staff Section Select Role

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.

3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.

3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.

## REFERRAL TAB

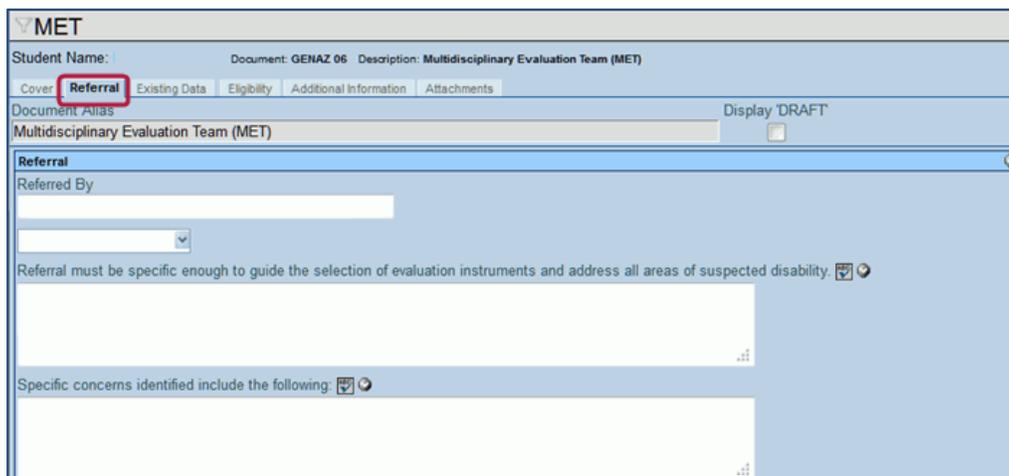
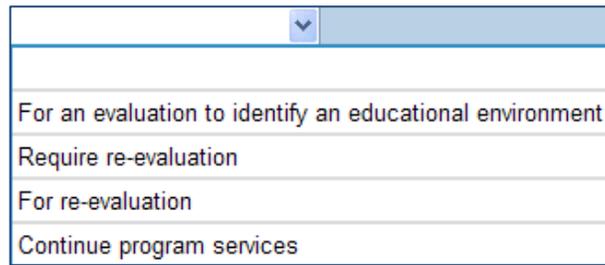


Figure 3-33 MET Report Screen Referral Tab

1. Type the name of the person who referred the student in the **Referred By** text box.

- The Referral section contains a drop-down that provides four key word stems describing referring reason. Select from the drop-down to display full statement or type the reason directly into the textbox provided.



For an evaluation to identify an educational environment
Require re-evaluation
For re-evaluation
Continue program services

Figure 3-34 MET Report Screen Referral Tab Stem Drop-down

- Enter relevant information in the **Specific concerns identified include the following** textbox.
- Click .



**Tip:** When entering, editing or viewing information in a textbox, grab  in the bottom right corner, to resize the box. The box can be adjusted larger to view more of the information or smaller to provide more room on the screen.

**EXISTING DATA TAB**

(For Preschool students proceed to Existing Data Tab - Preschool)

**MET**  
 Student Name: **Sabin, Heather R.** Document: **GENAZ 06** Description: **Multidisciplinary Evaluation Team (MET)**

Cover Referral **Existing Data** Eligibility Additional Information Attachments

Document Alias: Multidisciplinary Evaluation Team (MET) Display 'DRAFT'

**Review of Existing Data**

**Efforts to Educate the Student in the General Classroom**  
 In an effort to educate STUDENT in the regular classroom, the following interventions have been tried: [Text Area]

These intervention efforts resulted in: [Text Area]

**Attendance and Educational History**  
 A review of school records indicates that STUDENT has attended the following schools:

Line	Year	Grade	School Location	Absences	Significant Information
1					

Refresh From Attendance

Summary of Previous Assessments Including Evaluations, Medical Certification, and Information Provided by the Parents [Text Area]

**Medical Certification**

Line	Date	Description	Certified By

**State and District Testing**  
 State and District Testing Not Applicable

Description: [Text Area]

Line	Test Name	Test Grade	Test Date	Print Test
1	District Assessment			<input checked="" type="checkbox"/>
2	Terra Nova			<input checked="" type="checkbox"/>
3	AIMS			<input checked="" type="checkbox"/>
4	AIMS-A			<input checked="" type="checkbox"/>

Figure 3-35 MET Report Screen Existing Data Tab

 **Note:** The Efforts to Educate and Intervention fields are OPTIONAL. If no data is entered, the headings will not appear in the printed report.

1. Enter intervention data in the **Efforts to Educate the Student** in the regular Classroom text box, enter intervention data. Use  to spellcheck. Use  for more space.
2. In the **These Intervention efforts resulted in:** field, select from the drop-down options or type results directly in text box.

The student's attendance history imports from the Referral document. This history will only display attendance from the current school district.

1. Significant Information can be added in the textbox. Use  to spellcheck. Use  for more space.

If additional school years need to be added:

2. Click the **Add** button to display a new row.
3. Enter the school **Year**, **Grade**, **School Location** and **Absences** in the spaces provided. **Significant Information** can also be added to this row.

4. If needed, check  on the line of the record to remove. The row is removed.

#### Assessments

5. This textbox contains a drop-down that provides key word stems. The selection will insert full text paragraphs. Select one of the key word stems.

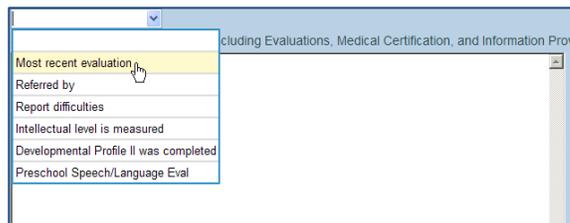


Figure 3-36 MET Report Screen Existing Data Tab Summary of Previous Assessments

The full statement based on the keyword selection will display in the textbox.

6. Complete the blank information.

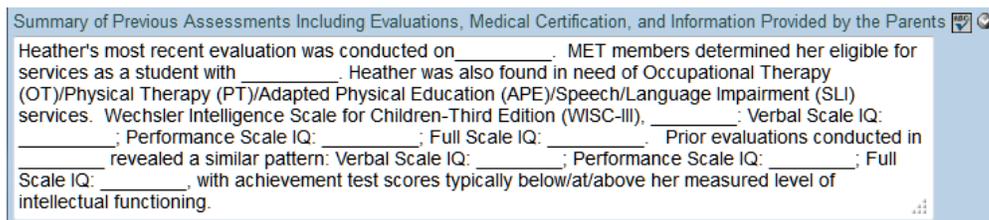


Figure 3-37 MET Report Screen Existing Data Tab Summary of Previous Assessments Statement

7. If the student has a current medical certification, click the **Add** button to add a row to the Medical Certification section.
8. Enter the **Date of Medical Certification** (MMDDYY) or click  and select date.
9. Fill in the **Description** and **Certified By** fields.

#### State and District Testing

If **State and District Testing Not Applicable** is checked and the document is saved, the testing data will be hidden from view. The following view will display:

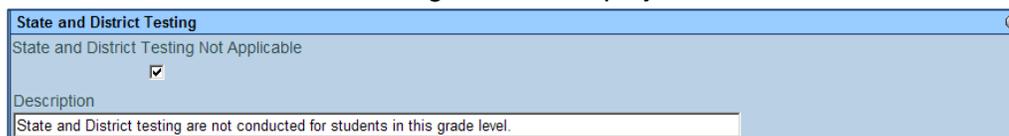


Figure 3-38 MET Report Screen Existing Data Tab State and District Testing

If **State and District Testing Not Applicable** is *NOT* checked the testing data grid will be available.

Standardized Tests cannot be removed but can be set to *not* print on the printable documents.

10. Click the checkmark (uncheck) in the **Print Test** column of the test rows that will not be used.

To add Standardized Test data:

11. Click the **Show Detail** button
12. Select the **Test Name** by clicking on the test name line.
13. Add the grade from the **Test Grade** drop-down.
14. Enter the **Test Date** (MMDDYY) or click  and select date.
15. Add **Test Scores** by clicking on the **Add** button in the Test Scores group box.
16. If needed, check  on the line of the **Test Score** to remove. The row is removed.
17. Click  before updating another test.
18. Click another **Test Name** and repeat the steps above, to update that test information, if desired.



The screenshot shows a software interface titled "Standardized Test" with a "Hide Detail" button in the top right. On the left, a table lists test names:

Line	Test Name
1	District Assessment
2	Terra Nova
3	AIMS
4	AIMS-A

To the right of this table are fields for "Test Grade" (a dropdown menu) and "Test Date" (a text field with a calendar icon). Below these fields is a "Test Scores" section with an "Add" button. At the bottom of the Test Scores section, there is a table with columns for "Line", "Subject", and "Test Level". A small "X" icon is visible next to the "Line" header.

Figure 3-39 MET Report Screen Existing Data Tab Report Test Scores

**EXISTING DATA TAB (CONTINUED)**

**Background, Medical and Developmental Information, Including Information Provided by Parents**

Parent concerns pertaining to educational progress: [text area]

Background Information [text area]

**Current Classroom Based Assessment and Performance in the General Curriculum**

Classroom Functioning [text area]

Additional Information Provided by Teacher(s) and Related Service Provider(s) [text area]

**Impact of Educational Disadvantage and Limited English Proficiency on Progress in the General Curriculum (e.g. English Language Assessment Results)**

Please address the following factors and describe in detail if significant: consideration of lack of learning opportunities, frequent school changes, poor attendance, multiple teachers in the same year, questionable home school curriculum, inadequate general curriculum and/or instruction, and limited English proficiency [text area]

The determinant factor in this student's difficulty progressing in the general curriculum

Reading [dropdown] Math [dropdown] English Proficiency [dropdown]

Other [text area]

**Consideration of the Need for Additional Data**

The parent/guardian reviewed existing data and participated in the decision regarding the need to gather additional data. The parent/guardian received a copy of the referral and was requested to provide input.

The team reviewing the existing data included: [text area]

On the basis of the review of existing data and input from the student's parents, the team determined that [dropdown]

Addl Data Desc [text area]

Refresh From Parent Permission [button]

Figure 3-40 MET Report Screen Existing Data Tab Part 2

Parent Concerns and Background Information will have imported in from the Parent Input if the Refresh From Parent Input button was selected.

19. Editing may be necessary in order for sentences to flow clearly.

**Background, Medical and Developmental Information, Including Information Provided by Parents**

Parent concerns pertaining to educational progress: [text area]

Background Information [text area]

Parent input, including medical and developmental information and history, was provided by parent. The summary indicated that Harry presently lives with his mother. There are 2 children in the home, whose ages are 5 and 7.

Figure 3-41 MET Report Screen Existing Data Tab Background Information

Classroom Functioning will import data from the Referral document/Student Performance if Refresh from Referral button was selected.

- If appropriate, use the **Additional information** textbox for information not included in the Referral entry.

**Current Classroom Based Assessment and Performance in the General Curriculum**

Classroom Functioning

Cissy Horn, Reading teacher, stated that Harry changes to new tasks appropriately, and demonstrates appropriate level of motor activity. Skills reported as lacking are completes classroom work, performs adequately on major tests, and appears to be organized. The teacher further stated that "Harry is a pleasant student and gets along well with peers."

Additional Information Provided by Teacher(s) and Related Service Provider(s)

Figure 3-42 MET Report Screen Existing Data Tab Assessment and Performance

**Impact of Educational Disadvantage and Limited English Proficiency in the General Curriculum** textbox is for information relevant to English Language Proficiency issues.

**Impact of Educational Disadvantage and Limited English Proficiency on Progress in the General Curriculum (e.g. English Language Assessment Results)**

Please address the following factors and describe in detail if significant: consideration of lack of learning opportunities, frequent school changes, poor attendance, multiple teachers in the same year, questionable home school curriculum, inadequate general curriculum and/or instruction, and limited English proficiency

The determinant factor in this student's difficulty progressing in the general curriculum

Reading   Math   English Proficiency

Other

Figure 3-43 MET Report English Language Assessment Results

- Address the statement as directed. Use  to spellcheck. Use  for more space.
- Select the **determinant factor** that applies to this student using the drop-down lists provided:

Reading	Math	English Proficiency
is lack of appropriate instruction in reading	is lack of appropriate instruction in math	is Limited English Proficiency
is not lack of appropriate instruction in reading	is not lack of appropriate instruction in math	is not Limited English Proficiency

Figure 3-44 MET Report Screen Existing Data Tab Determinant Factor Selection

- The **Other** textbox is available as needed.
- In **The team reviewing the existing data included:** textbox list all individuals who have reviewed existing data, including parent and staff. If records were reviewed at a Transition conference, include participants in this list.

**Consideration of the Need for Additional Data**

The parent/guardian reviewed existing data and participated in the decision regarding the need to gather additional data. The parent/guardian received a copy of the referral and was requested to provide input.

The team reviewing the existing data included:

Figure 3-45 MET Report Screen Additional Data

25. **On the basis of the review of existing data included:** dropdown select whether or not additional data is necessary to determine eligibility.

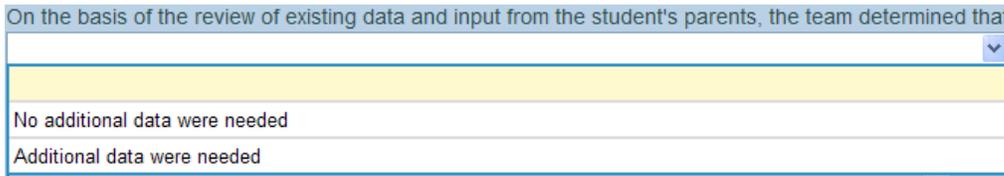


Figure 3-46 MET Report Screen Additional Data Were Needed

If **No additional data were needed** is selected, the Additional Data tab will not appear. Proceed to Eligibility tab.

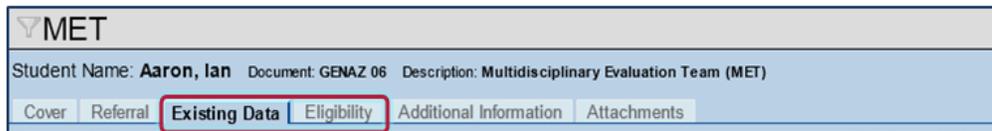


Figure 3-47 MET Report Screen No Additional Data Tab

If **Additional data were needed is selected**, the Additional Data tab will be necessary. See [Additional Data Tab](#) description which follows the [Existing Data Tab Preschool](#).



Figure 3-48 MET Report Screen Additional Data Tab

26. Enter a description of the additional data needed.

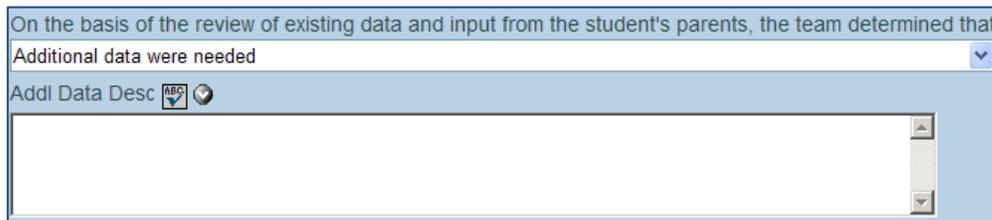


Figure 3-49 MET Report Screen Additional Data MET Report Screen Additional Data Description

**EXISTING DATA TAB PRESCHOOL**

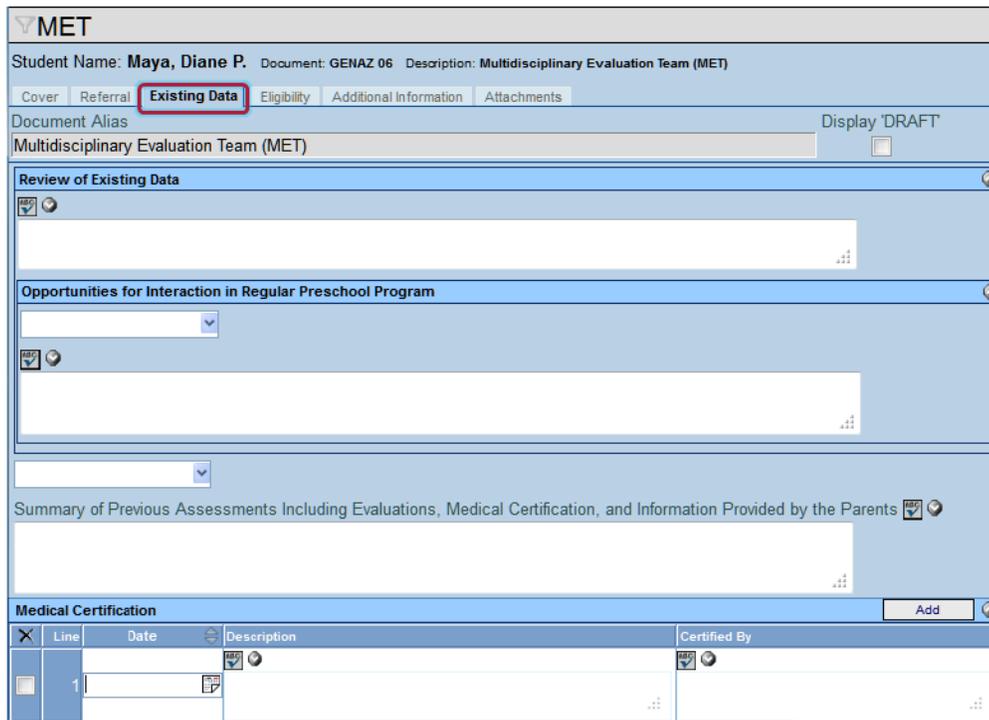


Figure 3-50 MET Report Screen Existing Data Tab Preschool Screen

1. In the **Review of Existing Data** textbox, summarize sources of previous information, including results of screening. Use  to spellcheck. Use  for more space.

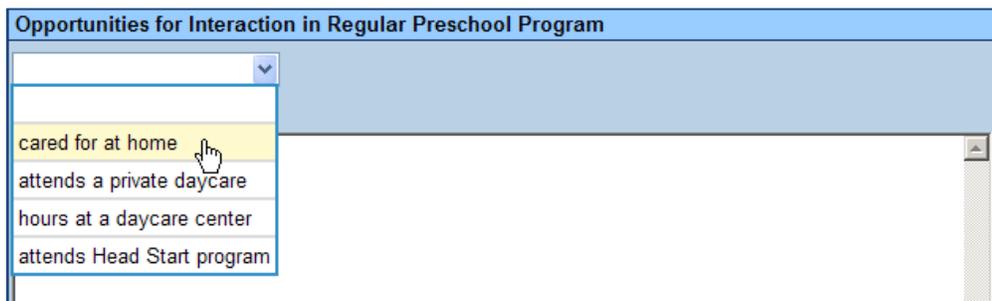


Figure 3-51 MET Report Screen Existing Data Tab Preschool Screen Opportunities for Interaction

2. In **Opportunities for Interaction in Regular Preschool Program**, select from the drop-down of library stem, the keywords that will insert a full text paragraphs. Edit as necessary or type description without using dropdowns.

The full statement based on the keyword selection will appear in the textbox.

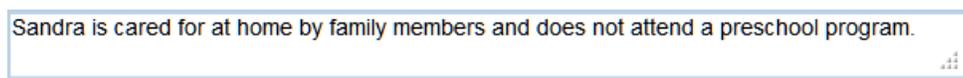


Figure 3-52 MET Report Screen Existing Data Tab Preschool Screen Library Statement

3. Repeat the directions for Summary of Previous Assessments Including Evaluations, Medical Certification, and Information Provided by the Parents.
4. If the student has a current medical certification click the **Add** button to add a row to the Medical Certification section.

5. Enter the **Date** of Medical Certification. (MMDDYY) or click  and select date.
6. Fill in the **Description** and **Certified By** fields.

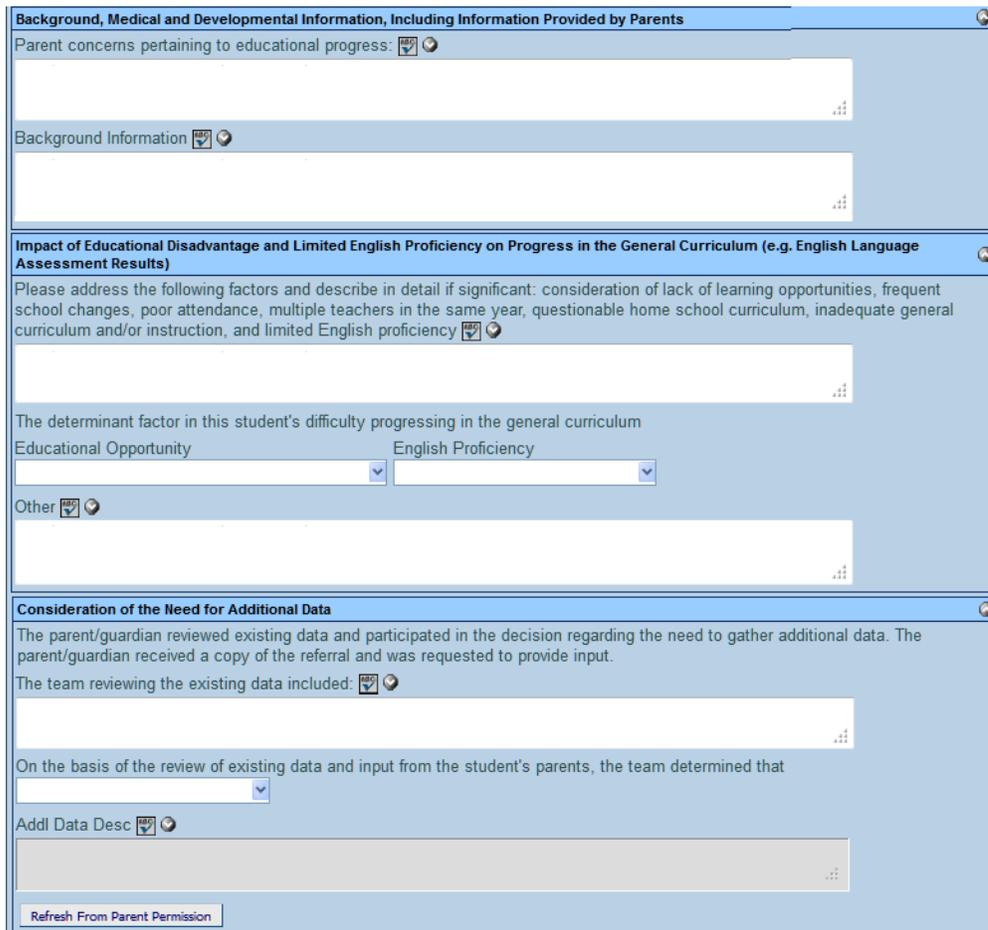


Figure 3-53 MET Report Screen Existing Data Tab Preschool ScreenPart 2

### EXISTING DATA TAB PRESCHOOL (CONTINUED)

The text fields under Background, Medical and Developmental Information, Including Information Provided by Parents will have imported in from the Parent Input document if Refresh From Parent Input button was selected.

7. Editing may be necessary in order for sentences to flow clearly.

The **Impact of Educational Disadvantage and Limited English Proficiency in the General Curriculum** textbox is for information relevant to English Language Proficiency issues.

8. Address the statement as directed. Use  to spellcheck. Use  for more space.
9. Select the determinant factor that applies to this student using the drop-down lists provided:

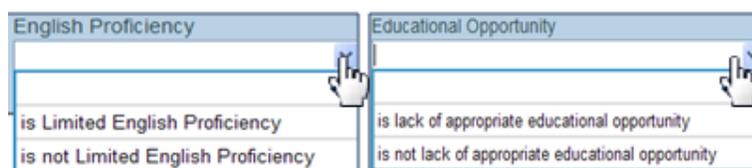


Figure 3-54 MET Report Screen Existing Data Tab Preschool Screen Determinant Factors

10. The **Other** textbox is available as needed.



## ADDITIONAL DATA TAB

**MET**

Student Name: **Armenta, Sandra** Document: **GENAZ 06** Description: **Multidisciplinary Evaluation Team (MET)**

[Cover](#)
[Referral](#)
[Existing Data](#)
[Additional Data](#)
[Eligibility](#)
[Additional Information](#)
[Attachments](#)

Document Alias  
**Multidisciplinary Evaluation Team (MET)**

Display 'DRAFT'

**Evaluation Procedures**

Evaluation Procedures

Evaluation Procedure Summary

**Classroom Observations**

Classroom Observation

**Test Behavior**

Test Behavior

**Assessment Results**

Category

Test

**Tests**

X	Line	View Order	Test Short Name	Test Name

**Other Findings**

**Summary of Additional Data**

Figure 3-55 MET Report Screen Additional Data Tab

1. In **Evaluation Procedures**, select from the list in the drop-down, those evaluation procedures that were needed. The full name of the test or assessment will populate the box below. Information can be added directly in the box, as well.

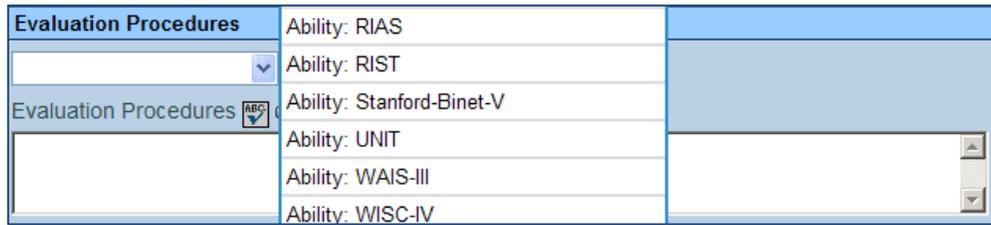


Figure 3-56 MET Report Screen Additional Data Tab Evaluation Procedures

- In the **Evaluation Procedure Summary** textbox select from the library keyword stems.

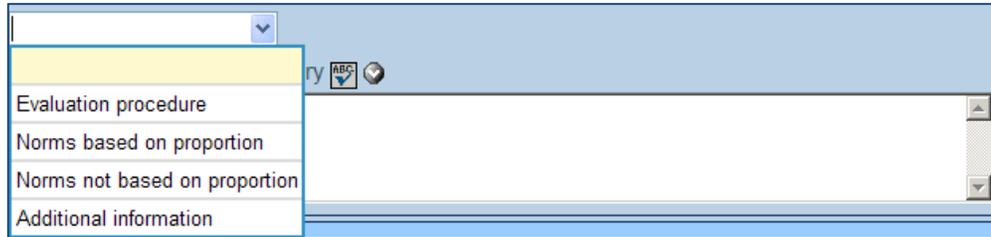


Figure 3-57 MET Report Screen Additional Data Tab Evaluation Procedure Summary

- The full statement will appear in the textbox or text can be added directly without using the drop-down list.

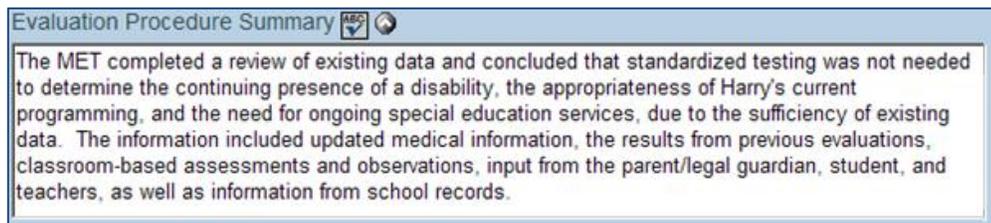


Figure 3-58 MET Report Screen Additional Data Tab Evaluation Procedure Summary Textbox

- Repeat the directions for entering information in **Classroom Observations** and **Test Behavior**.
- Tests are organized by Categories. Choose the assessment **Category** from the drop-down.
- Select the **Test** from the drop-down.

 **Note:** Districts have the ability to add and remove Categories and Tests based on individual needs and preferences.

- Click [Add Test](#). The test selected above is displayed in the grid. Multiple tests may selected by repeating the steps above.
- Click the **Line** number of the test. The line highlights.
- Click again or click [Show Detail](#). The Test Detail opens on the right side of the screen.
- A template of the test displays for input of test scores and/or a narrative of the results.
- If needed, check  on the line of the test to remove. Click [Save](#).
- The row is removed.

13. **Other Findings** and **Summary of Additional Data** are optional textboxes to allow for inclusion of information other than results of standardized testing.
14. Click , when finished.

**MET**

Student Name: **Sabin, Heather R.** Document: **GENAZ 06** Description: **Multidisciplinary Evaluation Team (MET)**

Cover Referral Existing Data **Eligibility** Additional Information Attachments

Document Alias Display 'DRAFT'

Multidisciplinary Evaluation Team (MET)

**Summary of Student's Performance and Progress in the General Curriculum**

Describe overall functioning, including strengths and weaknesses, drawn from all sources of data included in the report. Describe student's performance in the educational setting and progress in the general curriculum. (This section will go to the PLAAFP on the IEP).

**Educational Needs and Recommendations to Access the General Curriculum, including Assistive Technology**

Describe impediments to learning and instructional techniques and supports needed to allow the student to access the general curriculum in the general education classroom and the special education classroom. (This will go to the PLAAFP in the IEP).

Accommodation Category

Accommodation Category Detail

Accommodation Description

Assistive Technology (A.T.)

**Determination of Eligibility**

Student has an Impairment

Student's Impairment has Resulted in an Adverse Impact on Educational Performance

Student Requires Specially Designed Instruction

Eligibility

**Disability**

Primary Disability

**Secondary Disabilities**

AUTISM  EMOTIONAL DISTURBANCE  HEARING IMPAIRMENT  INTELLECTUAL DISABILITY

Figure 3-59 MET Report Screen Eligibility Tab

### ELIGIBILITY TAB

1. Address the questions under **Summary of Student's Performance and Progress in the General Curriculum**. Include the student's functional level including data sources listed. Data from this field will import into the IEP document / PLAAFP tab.
2. **Educational Needs and Recommendations to Access the General Curriculum / Assistive Technology** contains a drop-down that provides key word stems. The selection will insert full text paragraphs. Select one of the key word stems, or enter data directly into textbox. Data from this field will import into the IEP document / PLAAFP tab.

Accommodations are organized by Category and Category Detail (specific accommodations). Accommodations input here will import into The IEP – GENAZ 12.

3. Select the accommodation category from the **Accommodation Category** drop-down list.

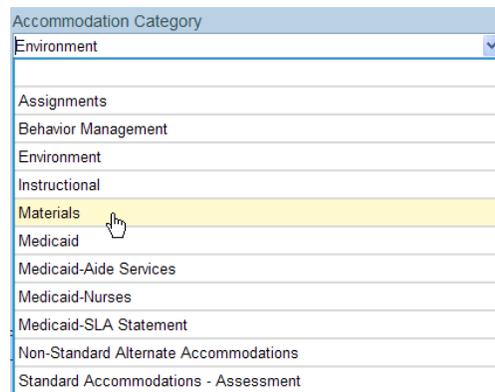


Figure 3-60 MET Report Screen Eligibility Tab Accommodation Category

4. Select the specific accommodation from the **Accommodation Category Detail** drop-down list. The accommodation will populate into the Accommodation Description textbox.

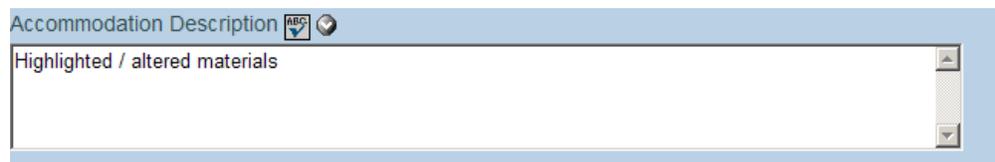


Figure 3-61 MET Report Screen Eligibility Tab Accommodation Description

5. Add **Assistive Technology** accommodations by selecting from the drop-down list provided or typing in the textbox directly.
6. Under Determination of Eligibility, select the appropriate statements for the Student has an Impairment, **Student's Impairment has Resulted in an Adverse Impact on Educational Performance, Student Requires Specially Designed Instruction** and Eligibility from the drop-downs.

Based on the above selections, a statement will appear on the printable MET Report.

When **No** is selected from the drop-down, the following statement will appear in the printable document:

**Determination of Eligibility**

The MET reached consensus that Harry exhibits no educational disability and consequently does not require special education services in order to make appropriate educational progress at this time.

When **Yes** is selected from the drop-down, the following statement will appear in the printable document:

**Determination of Eligibility**

The MET reached consensus that Harry exhibits the following disability: specific learning disability, autism. Eligibility was determined according to the criteria considered on the attached eligibility determination document(s).

7. Select the **Primary Disability** from the drop-down list.
8. Check any Secondary **Disabilities** that apply.
9. Click .

**ADDITIONAL INFORMATION TAB**

▼ MET

Student Name: **Maya, Diane P.** Document: **GENAZ 06** Description: **Multidisciplinary Evaluation Team (MET)**

Cover Referral Existing Data Eligibility **Additional Information** Attachments

Document Alias: **Multidisciplinary Evaluation Team (MET)** Display 'DRAFT'

More Additional Information  

Figure 3-62 MET Report Screen Additional Information Tab

1. Enter any additional information that may be appropriate and helpful in implementing this student's IEP. Use  to spellcheck. Use  for more space.
2. Click .

The More Additional Information textbox is optional. It does not appear on printed document if left blank.

**ATTACHMENTS TAB**

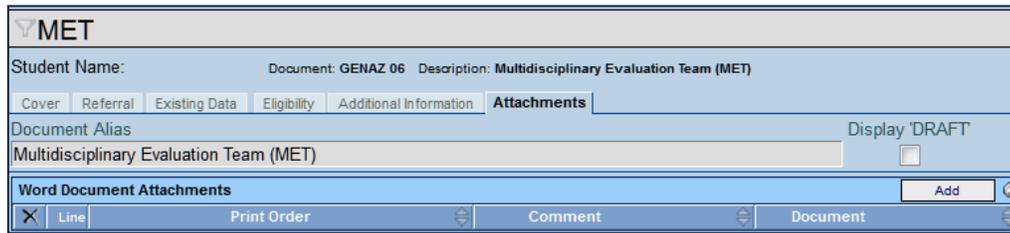


Figure 3-63 MET Report Screen Attachments Tab

The Attachments tab allows for the attachment of documents to the MET Report (such as Compuscore printouts of testing, supporting documentation from service providers, etc.) Documents included here will print at the back of the MET Report as a single document, but will not have continuous page numbers or headings.

1. Click the **Add** button to add an attachment. A new window opens.

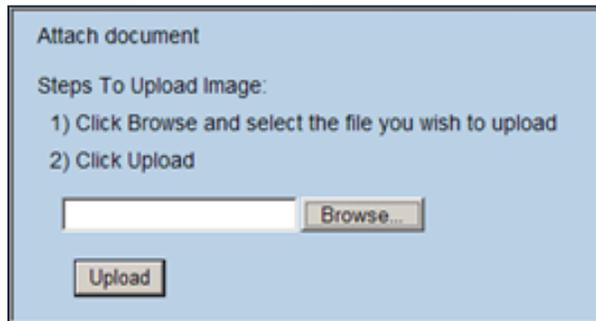


Figure 3-64 Attach Document

2. Click the **Browse** button and select the file you wish to upload.
3. Click Upload.



Figure 3-65 MET Report Screen Attachments Tab Attached Document

The name of the document displays in the **Comment** column. The type of document, Word or PDF, displays in the **Document** column.

4. The **Print Order** is the order the document will be printed following the MET report. This may be changed by typing in a different order.



**Note:** Attachments must be in Word or PDF format.

## GENAZ 07 – MET MEETING REQUEST

The MET Meeting Request is located in the Initial, Reevaluation and Preschool Process.

The MET Meeting Request contains two tabs:

- Meeting Participants
- Parent Rights

**MET Meeting Request**

Student Name: Saager, Philip T. Document: GENAZ 07 Description: MET Meeting Request

**Meeting Participants** Parent Rights

Document Name: MET Meeting Request Document Date: [Calendar Icon]

**Meeting Participants**

Dear Parents/Guardians:  
 Your child's comprehensive evaluation is complete. The district needs to schedule a meeting with you. The purpose of the meeting is to discuss the data gathered in the evaluation for special education services of your child and to make a determination regarding eligibility. Parents are permitted to bring guests to the meeting, and are encouraged to invite the child's support coordinator if the student is served by another public agency, but are requested to inform the team ahead of time.  
 If you would like to review the records prior to the meeting, please contact [Staff Name]

**The following are invited to attend and participate in the eligibility meeting:**

Student (grades 7 - 12 must be involved)

**Parents**

Line	Parent Name	Participant
1	Saager, Arthur	<input type="checkbox"/>
2	Saager, Melissa	<input type="checkbox"/>

**Staff** [Add]

Line	Staff Name	Role
1	User, Admin	Case Carrier

**Other Specialists** [Add]

Line	Name	Role
	Name of District Representative	
	Name of Individual to Interpret Instructional Implications of Evaluation Results	

We would like to schedule a meeting with you at:  
 Location, Building, Room: [Text Field]

Meeting Date: [Calendar Icon] Meeting Time: [Text Field]

This meeting was confirmed on: [Calendar Icon] Contact Method: [Text Field] This meeting was confirmed by: [Text Field]

Comments: [Text Area]

If you need to change the date and/or time of the meeting, please call [Text Field] at [Text Field]

Figure 3-66 MET Meeting Request Screen

### MEETING PARTICIPANTS TAB

1. Enter the **Document Date** (MMDDYY) or click [Calendar Icon] and select date. This should reflect the date the document was created.

2. Click on ← next to **Staff Name** (see above) to enter the contact name for the parent. The Find: Staff screen displays.

Figure 3-67 Find: Staff Screen

3. Enter all or part of staff **Last Name, First Name**.
4. Click  or press ENTER. Search Results displays a list of matching criteria.
5. Click line of staff name. Line highlights.
6. Click again or click . Find: Staff screen closes and staff name displays.
7. Check **The Purpose of the meeting** or check **Other** and enter another purpose.

Figure 3-68 MET Meeting Request Screen Check Purpose

8. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.

Parent(s)/Guardian(s)					
Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Participant
1	Kelly, Louise	Mother	Yes	Yes	<input checked="" type="checkbox"/>
2	Wilkinson, Samuel	Step-Father	Yes	Yes	<input type="checkbox"/>
3	Smith, Brian	Father	No	No	<input type="checkbox"/>

Figure 3-69 MET Meeting Request Screen Parent(s)/Guardian(s) Check Parent

9. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Figure 3-70 MET Meeting Request Screen Staff Section Change/Add

Change current staff names:

10. Click ← next to the **Staff Name** to change. The Find: Staff screen displays.

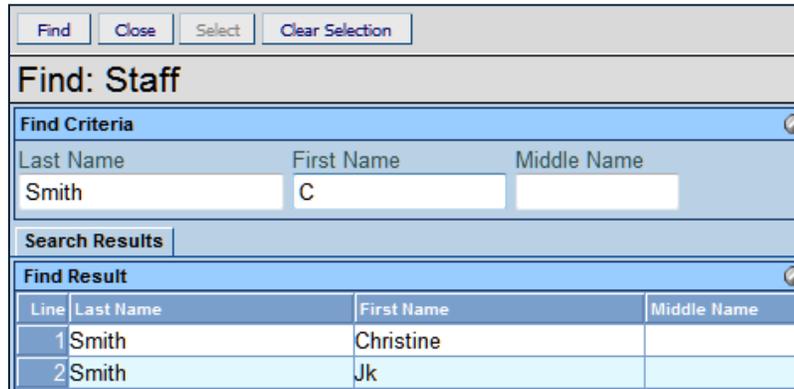


Figure 3-71 Find: Staff Screen

11. Enter all or part of staff **Last Name, First Name**.
12. Click  or press ENTER. Search Results displays a list of matching criteria.
13. Click line of staff name. Line highlights.
14. Click again or click . Find: Staff screen closes and staff name displays.

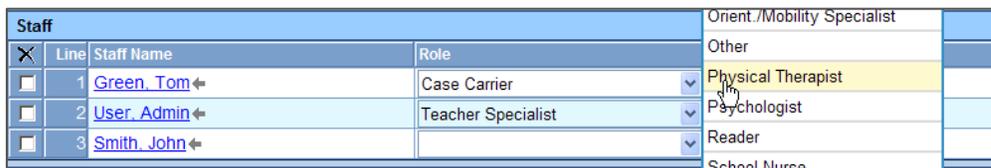


Figure 3-72 MET Meeting Request Screen Staff Section Select Role

15. Click the **Role** dropdown and select the staff role.

Add staff names:

16. Click **Add** on the Staff bar. A new line is added to the grid.
17. Repeat the procedure above.

18. If needed, check  on the line of the **Staff Name** to remove. The row is removed.

The Other Specialists section will allow for participant names that are not available in the Staff directory.

19. Click the **Add** button on the Other Specialists bar. A new row will be added.
20. Enter the **Name** and **Role** of the specialist.



Figure 3-73 MET Meeting Request Screen Other Specialists

21. If needed, check  on the line of the staff name to remove. The row is removed.

22. Enter meeting information in the textboxes provided.

We would like to schedule a meeting with you at:  
 Location, Building, Room  
 Hope High School, Room 302

Meeting Date: 08/26/2010  
 Meeting Time: 3:30 PM

This meeting was confirmed by phone on: 07/21/2010  
 This meeting was confirmed by: Sally Secretary

Comments

If you need to change the date and/or time of the meeting, please call  
 Sally Secretary  
 at  
 800-555-1234

Interpreter Needed  
 Procedural Safeguards Enclosed

Figure 3-74 MET Meeting Request Screen Information

23. Click **Save**.

**PARENT RIGHTS TAB**

The Parent Rights tab is for the parent to manually update when they receive the printed hard copy of the completed Meeting Request. This area is editable and can be completed for the parent or left blank for the parent to complete.

*Editable Version:*

**Parent Rights**

A parent has the Right to participate in all meetings regarding Identification, Evaluation, Placement, and Free Appropriate Education (FAPE) for their child. A parent has the Right to advance notice (approximately 10 days) for scheduled meetings on their child.

Please check the following, if applicable:

- I do not require a 10 day advance notice for the proposed meeting.
- I plan to attend this meeting.
- I do not plan to attend the proposed meeting, but am requesting an alternate meeting time.
- I do not plan to participate. Please meet and inform me of the outcome.
- Phone conference is requested.
- I need a copy of the Release of Student Records form and plan to bring \_\_\_\_\_ to the meeting whose position is \_\_\_\_\_
- I grant my consent for the individual(s) listed in the Other Specialists section of this document to attend this meeting.

Figure 3-75 MET Meeting Request Screen Parents Rights Tab View

*Printable Version (This is what the parent will see).*

**Parent Rights**

A parent has the Right to participate in all meetings regarding Identification, Evaluation, Placement, and Free Appropriate Education (FAPE) for their child. A parent has the Right to advance notice (approximately 10 days) for scheduled meetings on their child.

Please check the following, if applicable:

- I do not require a 10 day advance notice for the proposed meeting.
- I plan to attend this meeting.
- I do not plan to attend at the proposed time, but am requesting an alternate meeting time.
- I do not plan to participate. Please meet and inform me of the outcome.
- Phone conference is requested.
- I need a copy of the Release of Student Records form and plan to bring \_\_\_\_\_ to the meeting, whose position is \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Figure 3-76 Parents Rights Printable View

The document can be [printed](#), [validated](#) and [finalized](#).

**CREATING ADDITIONAL MET MEETING REQUEST DOCUMENTS**

In cases where additional attempts are made to schedule a MET Meeting, multiple MET Meeting Request documents may need to be created. Before an additional MET Meeting Request document can be created, the previous document must be finalized.

1. Click on the green icon that represents the finalized MET Meeting Request document. The DocumentViewList view will open displaying the previously finalized Parent Permission document.



Figure 3-77 Finalized Parent Permission Icon

2. Click . A new Parent Permission will open.

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 08 – NOTICE OF ELIGIBILITY

The Notice of Eligibility is located in the Initial, Reevaluation and Preschool Process.

The Notice of Eligibility provides several options:

- **Eligible for Placement:** If this option is selected, the document will be created and finalized and the student will remain in the Initial process.
- **Not Eligible for Placement:** If this option is selected, the document will be created and finalized and the student will be exited from Synergy SE. This notice and all other previously created documents will move to the student's historical documents.
- **Not Eligible for One Placement, but Eligible for Another:** In certain cases the student may be found not eligible for a certain special education category and eligible for another. If this option is selected, the user will be given the option during the finalizing process of this document, to determine whether to keep the student in Synergy SE.

[\(See: Documents With Unique Functionality\)](#)



**Note:** The Notice of Eligibility has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Eligibility contains one tab:

- **Prior Written Notice**

**▼ Prior Written Notice**

Student Name: **Saager, Philip T.** Document: **GENAZ 08** Description: **Notice of Eligibility**

**Prior Written Notice**

Document Name
Document Date

**Decision**

Current Decision:  Change Decision To "Not Eligible for Placement"

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Educational Placement

The Multidisciplinary Evaluation Team (MET) has found that Philip is a child with a disability as defined in the IDEA within the category or categories of:

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

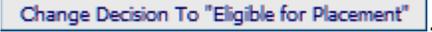
Procedural Safeguards provided to parent(s)  
 (initials)

This document was prepared by:

Case Manager  Case Manager Phone

Figure 3-78 Notice of Eligibility Screen

To create a Notice of Eligibility document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. The Notice of Eligibility opens in Eligible mode. To change the decision, click .
3. The Decision can be changed back to Evaluate by clicking .

Based on the decision made above, the document will state that the student is or is not eligible for placement in the selected category or categories.

4. Select the category or categories from the drop-down list.

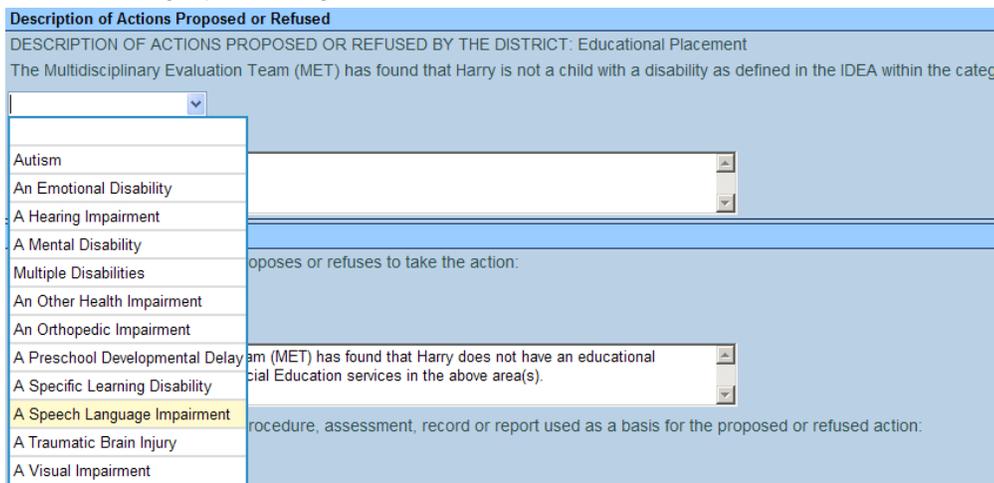


Figure 3-79 Notice of Eligibility Screen Disability Drop-down

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

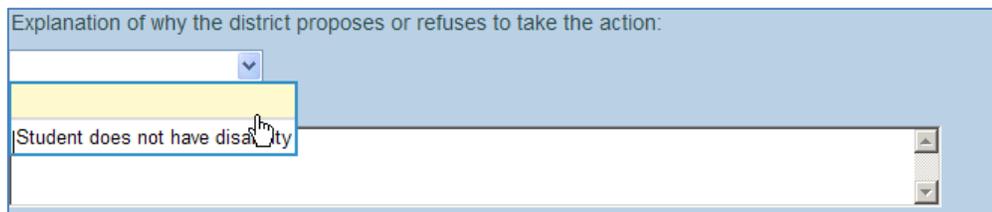


Figure 3-80 Notice of Eligibility Screen Section Drop-down

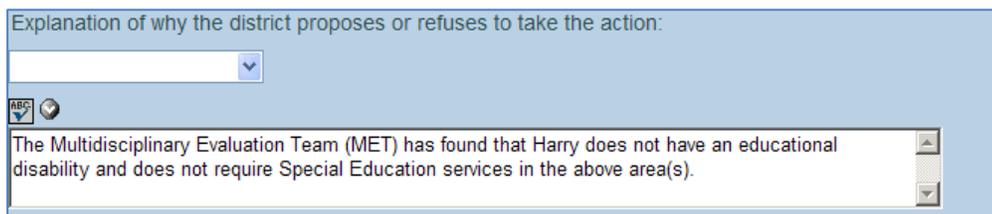
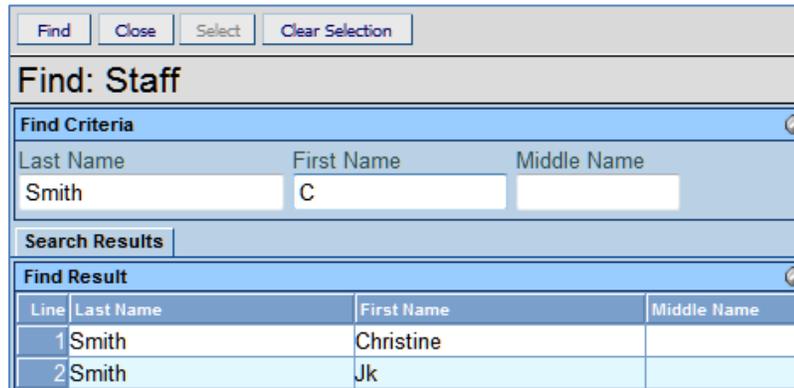


Figure 3-81 Notice of Eligibility Screen Section Populated

5. Click on the drop-down box located above the textbox.
6. Select the desired key-word stem in the drop-down list.
7. The statement associated with the key-word stem selected will appear in the textbox. Use  to spellcheck. Use  for more space.

8. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
9. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.



Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-82 Find: Staff Screen

10. Click  next to **This document was prepared by:**. The Find: Staff screen displays.
11. Enter all or part of staff Last Name, First Name.
12. Click  or press ENTER. Search Results displays a list of matching criteria.
13. Click line of staff name. Line highlights. Click again or click . Find: Staff screen closes and staff name displays.
14. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

#### NOTICE OF ELIGIBILITY AND INELIGIBILITY

Students who ARE eligible for placement in one or more categories but NOT eligible for another:

1. Create the Notice of Eligible for Placement with the decision of Eligible for Placement as directed above and proceed to finalize.
2. Click on the green icon that represents the finalized Notice of Eligibility document.



Figure 3-83 Notice of Eligibility Icon

The DocumentViewList screen opens displaying the previously finalized Notice of Eligibility document.

3. Click . A new Notice of Eligibility document opens.
4. Create this notice with the decision of Not Eligible for Placement as directed above.

**Exit Process**

You have indicated the student is not eligible for special ed for this disability. Is the student continuing in special ed because they are eligible for another disability? If you are sure you want to exit from special ed, please type in the fields below.

Exit Date: 07/05/2012

Exit Reason: [Dropdown menu]

Exit Explanation: [Text field]

Buttons: Continue in Special Ed (highlighted), Exit from Special Ed, Cancel

Figure 3-84 Exit Process Screen Continue in Special Ed

5. Finalize the document. Upon [finalizing](#), an Exit Process window will appear:
6. Click **Continue in Special Ed**. The student is to remain in special education since they are eligible for other disability placements.

Students who are NOT eligible for any special education services:

7. Create the Notice of Eligible for Placement with the decision of Not Eligible for Placement as directed above and proceed to finalize. Upon [finalizing](#), an Exit Process window will appear.

**Exit Process**

You have indicated the student is not eligible for special ed for this disability. Is the student continuing in special ed because they are eligible for another disability? If you are sure you want to exit from special ed, please type in the fields below.

Exit Date: 07/05/2012

Exit Reason: [Dropdown menu] (highlighted)

Exit Explanation: [Text field]

Buttons: Continue in Special Ed, Exit from Special Ed (highlighted), Cancel

Figure 3-85 Exit Process Screen Exit from Special Ed

8. Select the **Exit Reason** from the available drop-down statement.
9. Enter the Exit Explanation.
10. Click **Exit from Special Ed**. The student will be exited from Synergy SE. All previously created documents will move to the student's Historical Documents tab.

## GENAZ 09 – IEP MEETING REQUEST

The IEP Meeting Request is located in the Initial, Annual Review, Reevaluation, Transfer and Preschool Process.

The IEP Meeting Request contains two tabs:

- Meeting Participants
- Parent Rights

**MET Meeting Request**

Student Name: Saager, Philip T. Document: GENAZ 09 Description: IEP Meeting Request

**Meeting Participants** Parent Rights

Document Name: MET Meeting Request Document Date: [ ]

**Meeting Participants**

The following are invited to attend and participate in the meeting: [ ] meeting with you. The purpose of the meeting is to discuss the data gathered in the evaluation for special education services of your child and to make a determination regarding eligibility. Parents are permitted to bring guests to the meeting, and are encouraged to invite the child's support coordinator if the student is served by another public agency, but are requested to inform the team ahead of time.

If you would like to review the records prior to the meeting, please contact Staff Name [ ]

**The following are invited to attend and participate in the meeting:**

Student (grades 7 - 12 must be involved)

**Parents**

Line	Parent Name	Participant
1	Saager, Arthur	<input type="checkbox"/>
2	Saager, Melissa	<input type="checkbox"/>

**Staff** Add

Line	Staff Name	Role
1	User, Admin	Case Carrier

**Other Specialists** Add

Line	Name	Role
	Name of District Representative [ ]	
	Name of Individual to Interpret Instructional Implications of Evaluation Results [ ]	

We would like to schedule a meeting with you at:

Location, Building, Room [ ]

Meeting Date [ ] Meeting Time [ ]

This meeting was confirmed on [ ] Contact Method [ ] This meeting was confirmed by [ ]

Comments [ ]

If you need to change the date and/or time of the meeting, please call [ ]

at [ ]

Figure 3-86 IEP Meeting Request Screen

To create an IEP Meeting Request document:

**MEETING PARTICIPANTS TAB**

1. Enter the Document Date (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Click on  next to **Staff Name** (see above) to enter the contact name for the parent. The Find: Staff screen displays.

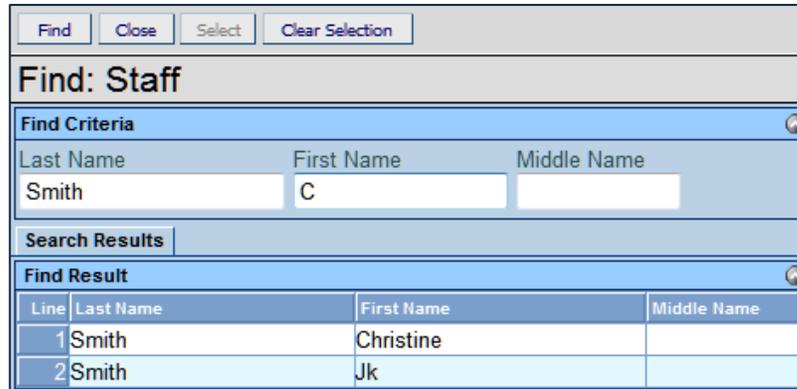


Figure 3-87 Find: Staff Screen

3. Enter all or part of staff **Last Name, First Name**.
4. Click  or press ENTER. Search Results displays a list of matching criteria.
5. Click line of staff name. Line highlights.
6. Click again or click . Find: Staff screen closes and staff name displays.
7. Check **The Purpose of the meeting** or check **Other** and enter another purpose.

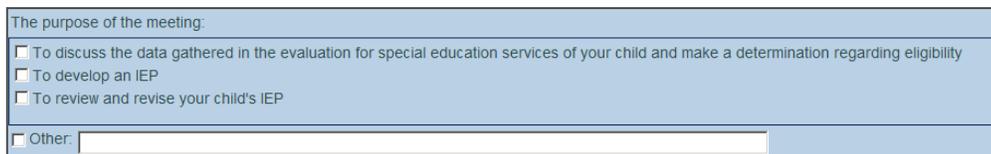


Figure 3-88 IEP Meeting Request Screen Check Purpose

8. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.

Parent(s)/Guardian(s)					
Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Participant
1	Kelly, Louise	Mother	Yes	Yes	<input checked="" type="checkbox"/>
2	Wilkinson, Samuel	Step-Father	Yes	Yes	<input type="checkbox"/>
3	Smith, Brian	Father	No	No	<input type="checkbox"/>

Figure 3-89 IEP Meeting Request Screen Parent(s)/Guardian(s) Check Parent

9. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

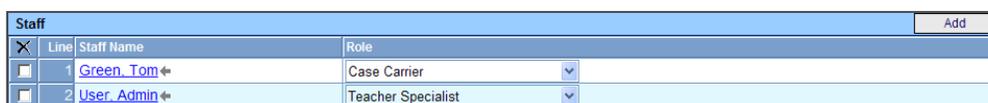


Figure 3-90 IEP Meeting Request Screen Meeting Request Staff Section Change/Add

Change current staff names:

10. Click  next to the Staff Name to change. The Find: Staff screen displays.

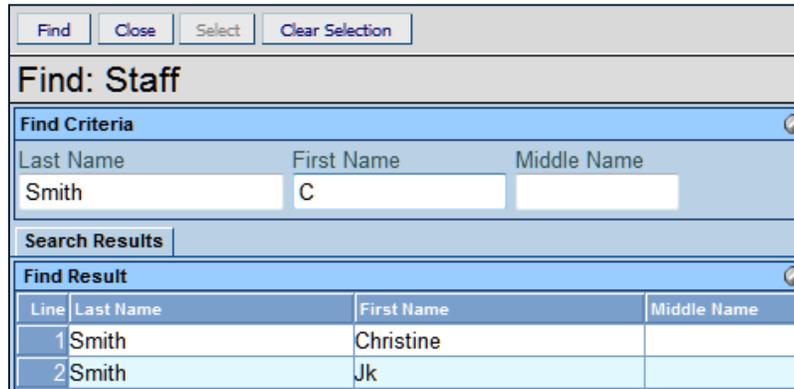


Figure 3-91 Find: Staff Screen

11. Enter all or part of staff **Last Name, First Name**.
12. Click  or press ENTER. Search Results displays a list of matching criteria.
13. Click line of staff name. Line highlights.
14. Click again or click . Find: Staff screen closes and staff name displays.



Figure 3-92 IEP Meeting Request Screen Meeting Request Staff Section Select Role

15. Click the **Role** dropdown and select the staff role.

Add staff names:

16. Click **Add** on the Staff bar. A new line is added to the grid.
17. Repeat the procedure above.

18. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Specialists section will allow for participant names that are not available in the Staff directory.

19. Click the **Add** button on the Other Specialists bar. A new row will be added.
20. Enter the **Name** and **Role** of the specialist.



Figure 3-93 IEP Meeting Request Screen Meeting Request Other Specialists

21. If needed, check  on the line of the staff name to remove. The row is removed.

22. Enter meeting information in the textboxes provided.

We would like to schedule a meeting with you at:  
 Location, Building, Room  
 Hope High School, Room 302

Meeting Date: 08/26/2010  
 Meeting Time: 3:30 PM

This meeting was confirmed by phone on: 07/21/2010  
 This meeting was confirmed by: Sally Secretary

Comments: [Empty text area]

If you need to change the date and/or time of the meeting, please call  
 Sally Secretary  
 at  
 800-555-1234

Interpreter Needed  
 Procedural Safeguards Enclosed

Figure 3-94 IEP Meeting Request Screen Information

23. Click **Save**.

**PARENT RIGHTS TAB**

The Parent Rights tab is for the parent to manually update when they receive the printed hard copy of the completed Meeting Request. This area is editable and can be completed for the parent or left blank for the parent to complete.

*Editable Version:*

**Parent Rights**

A parent has the Right to participate in all meetings regarding Identification, Evaluation, Placement, and Free Appropriate Education (FAPE) for their child. A parent has the Right to advance notice (approximately 10 days) for scheduled meetings on their child.

Please check the following, if applicable:

- I do not require a 10 day advance notice for the proposed meeting.
- I plan to attend this meeting.
- I do not plan to attend the proposed meeting, but am requesting an alternate meeting time.
- I do not plan to participate. Please meet and inform me of the outcome.
- Phone conference is requested.
- I need a copy of the Release of Student Records form and plan to bring \_\_\_\_\_ to the meeting whose position is \_\_\_\_\_
- I grant my consent for the individual(s) listed in the Other Specialists section of this document to attend this meeting.

Figure 3-95 IEP Meeting Request Screen Parents Rights Tab

*Printable Version (This is what the parent will see).*

**Parent Rights**

A parent has the Right to participate in all meetings regarding Identification, Evaluation, Placement, and Free Appropriate Education (FAPE) for their child. A parent has the Right to advance notice (approximately 10 days) for scheduled meetings on their child.

Please check the following, if applicable:

- I do not require a 10 day advance notice for the proposed meeting.
- I plan to attend this meeting.
- I do not plan to attend at the proposed time, but am requesting an alternate meeting time.
- I do not plan to participate. Please meet and inform me of the outcome.
- Phone conference is requested.
- I need a copy of the Release of Student Records form and plan to bring \_\_\_\_\_ to the meeting, whose position is \_\_\_\_\_

Parent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Figure 3-96 Parents Rights Printable View

The document can be [printed](#), [validated](#) and [finalized](#).

**CREATING ADDITIONAL MEETING REQUEST DOCUMENTS**

In cases where additional attempts are made to schedule a MET Meeting, multiple MET Meeting Request documents may need to be created. Before an additional MET Meeting Request document can be created, the previous document must be finalized.

1. Click on the green icon that represents the finalized MET Meeting Request document. The DocumentViewList view will open displaying the previously finalized Parent Permission document.



Figure 3-97 Finalized Parent Permission Icon

2. Click . A new Parent Permission will open. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 10 – NOTICE OF PLACEMENT (INITIAL)

The Notice of Placement (Initial) is located in the Initial Process.



**Note:** The Notice of Placement (Initial) has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Placement contains one tab:

- **Prior Written Notice**

**▼ Prior Written Notice**

Student Name: **Akins, Shawn E.** Document: **GENAZ 10** Description: **Notice of Placement**

**Prior Written Notice**

Document Name

Document Date

Notice of Placement

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
The evaluation team has received a referral for a possible comprehensive evaluation of your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)

(initials)

This document was prepared by:

Admin User

Case Manager  Case Manager Phone

Figure 3-98 Notice of Placement Screen

To create a Notice of Placement document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

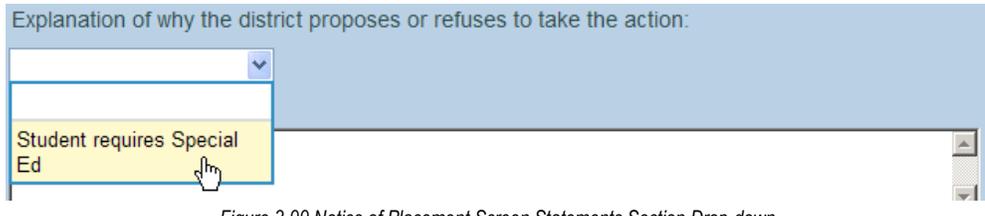


Figure 3-99 Notice of Placement Screen Statements Section Drop-down

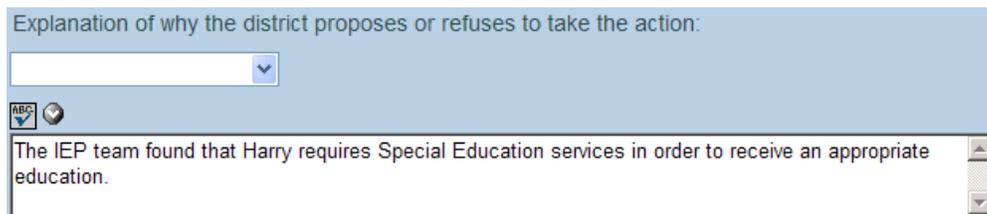


Figure 3-100 Notice of Placement Screen Statements Section Populated

2. Click on the drop-down box located above the textbox.
3. Select the desired key-word stem in the drop-down list.
4. The statement associated with the key-word stem selected will appear in the textbox. Use  to spellcheck. Use  for more space.
5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click  next to **This document was prepared by:**. The Find: Staff screen displays.

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-101 Find: Staff Screen

8. Enter all or part of staff **Last Name, First Name**.
9. Click  or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.
11. Click again or click . Find: Staff screen closes and staff name displays.
12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 11 – NOTICE OF IEP (INITIAL)

The Notice of IEP is located in the Initial Process.



**Note:** The Notice of IEP (Initial) has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of IEP contains one tab:

- **Prior Written Notice**

**Prior Written Notice**

Student Name: **Akins, Shawn E.** Document: **GENAZ 11** Description: **Notice of IEP**

**Prior Written Notice**

Document Name: **Notice of IEP** Document Date:

---

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
 The evaluation team has received a referral for a possible comprehensive evaluation of your child.

---

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

---

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
 (initials)

This document was prepared by:  
 **Admin User**

Case Manager:  Case Manager Phone:

Figure 3-102 Notice of IEP Screen

To create a Notice of IEP document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

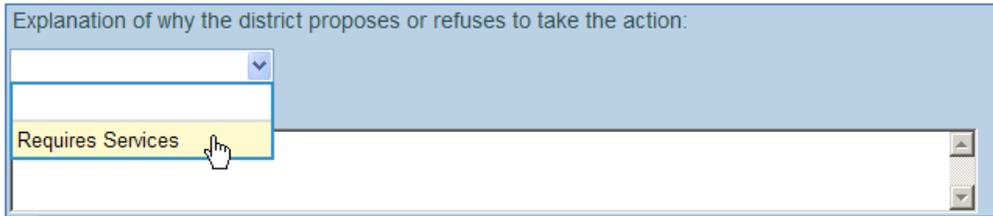


Figure 3-103 Notice of IEP Screen Statements Section Drop-down

2. Click on the drop-down box located above the textbox.
3. Select the desired key-word stem in the drop-down list.

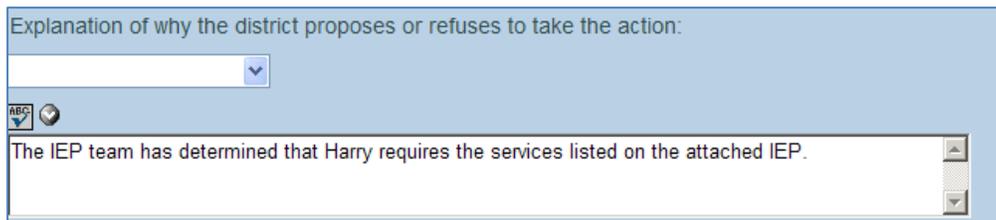


Figure 3-104 Notice of IEP Screen Statements Section Populated

4. The statement associated with the key-word stem selected will appear in the textbox. Use  to spellcheck. Use  for more space.



**Tip:** When entering, editing or viewing information in a textbox, grab  in the bottom right corner, to resize the box. The box can be adjusted larger to view more of the information or smaller to provide more room on the screen.

5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click  next to **This document was prepared by:**. The Find: Staff screen displays.

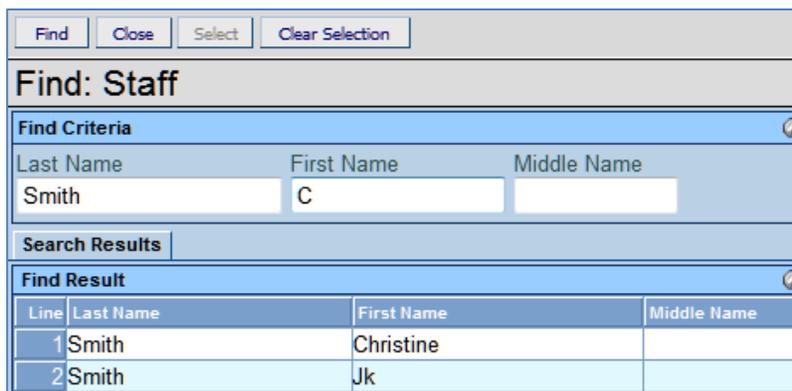


Figure 3-105 Find: Staff Screen

8. Enter all or part of staff **Last Name, First Name**.
9. Click  or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.
11. Click again or click . Find: Staff screen closes and staff name displays.
12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 12 – IEP

The IEP is located in the Initial, Annual Review, Reevaluation and Preschool Process.

The screenshot displays the 'Student IEP' interface for a student named Sabin, Heather R. The interface includes a top navigation bar with tabs: Cover (selected), Medical, PLAAFP, Special Cons., Goals, Services, Supl. Aids & ESY, Testing, LRE, Parent St., Medicaid, and Attachments. Below the tabs, the 'Dates' section contains fields for Re-evaluation Due Date, IEP Date (09/05/2012), IEP Review Due Date (09/04/2013), Process Name (Initial Evaluation), and a Display 'DRAFT' checkbox. The 'Eligibility' section includes a Primary Eligibility dropdown and a Secondary Eligibility area with checkboxes for various conditions: AUTISM, COMMUNICATION DISORDER, DEAFBLINDNESS, EMOTIONAL DISTURBANCE, HEARING IMPAIRMENT, INTELLECTUAL DISABILITY, ORTHOPEDIC IMPAIRMENT, OTHER HEALTH IMPAIRMENT, SPECIFIC LEARNING DISABILITY, TRAUMATIC BRAIN INJURY, and VISUAL IMPAIRMENT. The 'Program Recommended' section has a text input field. The 'IEP Team Members' section includes a dropdown for 'Student Consulted/Present' and a 'Refresh Participants from Team' button. The 'Parent Participants' table lists Sabin, Brian (Father) and Sabin, Judith (Mother), both with 'Yes' for 'Contact Allowed' and 'Consulted/Present' status. The 'Staff Participants' table lists User\_Admin (Case Carrier) and Horn\_Cissy (Special Ed Teacher), both with 'Consulted/Present' status. The 'Other Participants' section has an 'Add' button and a table header with columns for Line, Name, Title, Role, and Consulted/Present.

Figure 3-106 IEP Screen

(See: [Documents With Unique Functionality](#))

The IEP contains twelve tabs. The tabs include:

- **Cover**
- **Medical**
- **PLAAFP (Present Levels of Academic Achievement and Functional Performance)**
- **Special Cons. (Considerations)**
- **Goals**
- **Services**
- **Supl. Aides and ESY (Supplementary Aides and Extended School Year)**
- **Testing**
- **LRE (Least Restrictive Environment)**
- **Parent St. (Parent Statement - Optional for Annual Review and Reeval IEP's)**
- **Medicaid**
- **Attachments**

To create an IEP document:

**COVER TAB**

Figure 3-107 IEP Screen Cover Tab

The Reevaluation Due Date will display the date that the next Reevaluation is due for the student. This date is pulled from the most recent finalized MET Report.

1. The IEP Date will display the date from the most recent IEP. This date will control the IEP Review Due Date. If desired, enter a different **IEP Date** (MMDDYY) or click and select date. The IEP Review Due Date is pulled from the IEP Date field. It calculates by adding one year minus one day to determine the next annual review due date.

The Process Name indicates the process the student currently resides in.

2. Checking **Display “DRAFT”** will display the word DRAFT on all pages of the IEP. Make sure to uncheck this box prior to finalizing or it will display on the finalized IEP.
3. A section is available for **Documentation of efforts to schedule the IEP meeting**. Click the **Add** button to create a new row.
4. Enter **Date** (MMDDYY) or click and select date.
5. Enter the **Description** of the effort into the box.

6. If needed, check on the line of the documentation record to remove. The row is removed.

7. Indicate if **Interpreter Needed** by selecting **Yes** or **No** from the drop-down provided. If yes is selected, a staff member with the Role of Interpreter must be added.

The Primary Eligibility field is filled in automatically from the MET Report - GENAZ 06 or the Transfer Process – GENAZ 24.

8. Check the Secondary Eligibilit(ies), if any.
9. Enter the **Program Recommended** for this student.
10. Click **Refresh Participants from Team** to display the participants who have been added to the student's Team List. A confirmation screen displays.
11. Confirm Refresh Staff by entering **Yes** and clicking the **Continue** button.

Participant changes can be made directly to this document, also.

1. Click **Student Consulted/Present** drop-down and select the appropriate option. Selecting either option will place the student in the Participants section of the printable document. If the field is left blank the student will not be included in the Participants list.
2. On the Parent Participants section, click the **Consulted/Present** drop-down and select the appropriate option. The Parent Participants section will display the Parent/Guardians for the student as they appear in Synergy SIS (or other district SIS). Selecting from the Consulted/Present dropdown will place the specific parent in the Participants section of the printable document. If the drop-down is left blank the parent will not be included in the Participants list.

The Staff Participants section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List.

Staff Names displaying will be included as either consulted or present, however changes may be made including additional staff names added.

1. If the staff members **Role** is different for this IEP meeting, click the drop-down and make the appropriate selection.
2. Click the **Consulted/Present** drop-down and select the appropriate option, for each staff participant. If the field is left blank, the staff member will not appear in the Participant Section of the Printable IEP.

Change current staff participant names:

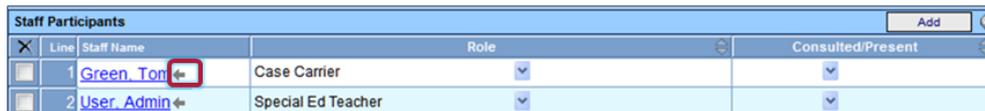
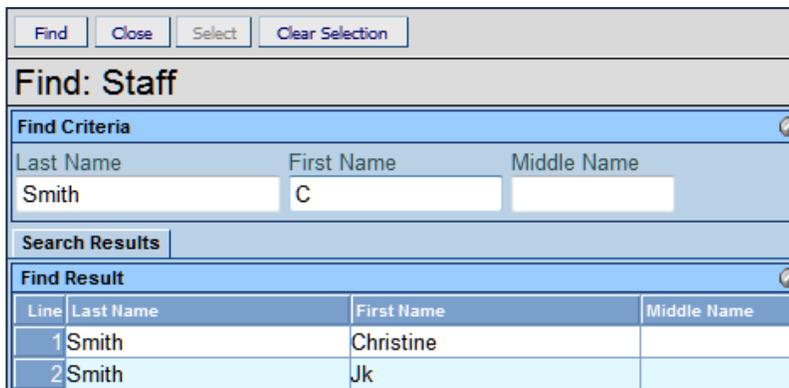


Figure 3-108 IEP Screen Cover Tab Staff Section Change/Add

3. Click **Find** next to the **Staff Name** to change. The Find: Staff screen displays.



4. Enter all or part of staff **Last Name, First Name**.
5. Click  or press ENTER. Search Results displays a list of matching criteria.
6. Click line of staff name. Line highlights.
7. Click again or click . Find: Staff screen closes and staff name displays.
8. Click the **Role** dropdown and select the staff role.

Add staff names:

1. Click **Add** on the **Staff Participants** bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the **Staff Name** to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

4. Click the **Add** button on the Other Participants bar. A new row will be added.
5. Enter the **Name, Title and Role** of the participant.
6. Click the **Consulted/Present** drop-down and select the appropriate option, for each participant.
7. Click .



**Note:** Staff roles of District Representative and Individual to Interpret Results are required fields. The IEP will display a validation error when finalizing if Staff Participants have not been added with those roles.

**MEDICAL TAB**

The Medical Tab will display information from the most recent finalized IEP, or if this is a new referral, it will have imported the medical data from the Parent Input / Pertinent Medical Information.

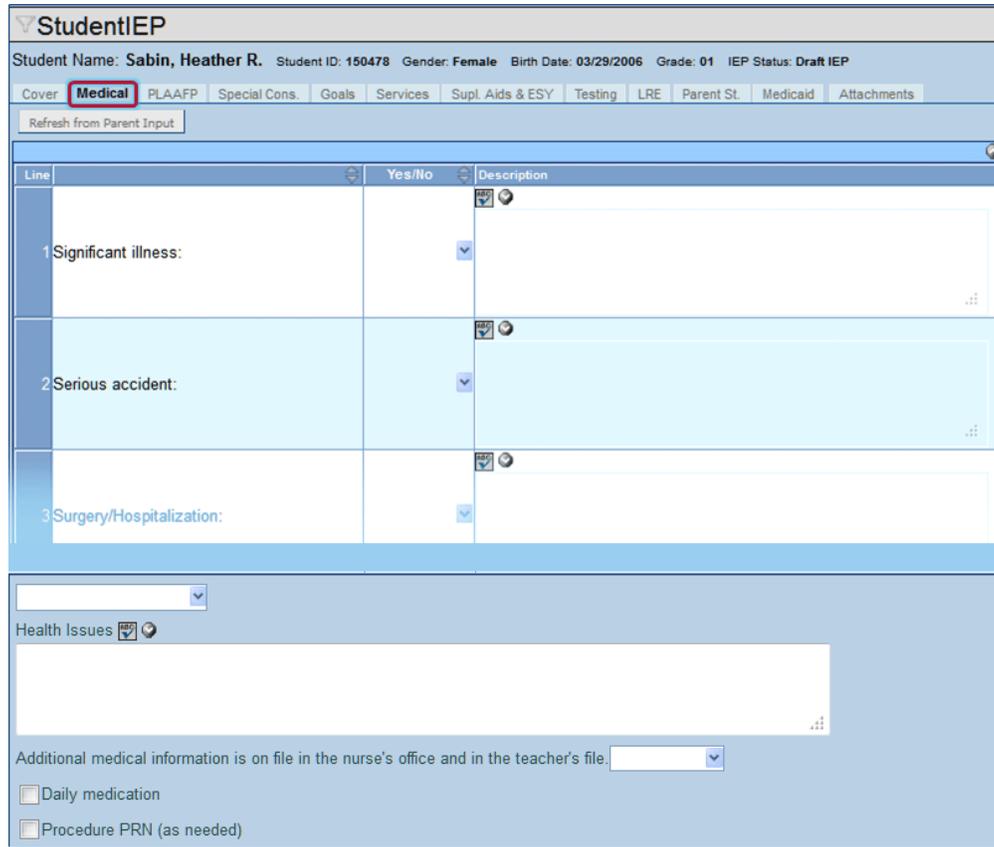


Figure 3-110 IEP Screen Medical Tab

1. To import the most recent data from the Parent Input, click Refresh from Parent Input. A confirmation screen displays.
2. Confirm Refresh Medical Information by entering **YES** and clicking the **Continue** button.

If there is no Parent Input document created or if this is an Annual Review IEP the button will not be available.

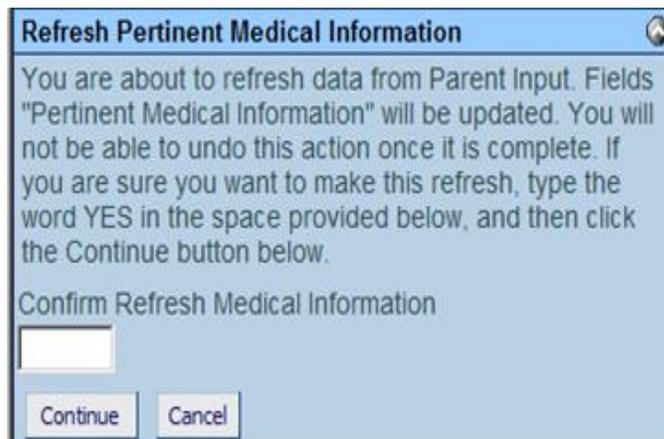


Figure 3-111 IEP Screen Medical Tab Refresh Confirmation



**Caution:** If any text has been manually added to the fields prior to clicking the Refresh button, the data will be over-written with the imported data.

Changes can be made directly to this section. (This will not affect the data currently in the Parent Input or MET Report).

3. Select from the **Yes/No** dropdowns.
4. Type the details of the selection by entering data in the Description Textbox provided. Use  to spellcheck. Use  for more space.



**Note:** Individual school districts can make the decision to hide the Medical List Items or have only items marked Yes/No appear on the printable IEP. Check with your district's System Administrator for more information on how your district has set up the Medical section.

5. Select **Health Issues** from the drop-down list of key words provided. Data can also be typed directly into the Health Issues textbox.
6. Select the desired key-word stem in the drop-down list.
7. The statement associated with the key-word stem selected displays in the textbox. Use  to spellcheck. Use  for more space.

Figure 3-112 IEP Screen Medical Tab Health Issues

8. Data can also be typed directly into the Health Issues textbox.
9. Indicate if Additional Medical Information is on file in the nurse's office and in the teacher's file.
10. Indicate if **Daily medication** or **Procedure PRN (as needed)** is necessary for this student by clicking in the checkboxes.
11. Click .

Daily Medication and Procedures PRN are Medicaid billable items. If either is selected, those items will be placed on the CONSENT TO CLAIM MEDICAID REIMBURSEMENT page which will print as part of the IEP document.

**PLAAFP TAB**

(Present Levels of Academic Achievement and Functional Performance)

**Student IEP**  
 Student Name: Sabin, Heather R. Student ID: 150478 Gender: Female Birth Date: 03/29/2006 Grade: 01 IEP Status: Draft IEP

Cover Medical **PLAAFP** Special Cons. Goals Services Supl. Aids & ESY Testing LRE Parent St. Medicaid Attachments

Include Transition in IEP

**Assessment Results including Age-Appropriate Transition-based Assessments**

**Standardized Test** Show Detail

Line	Test Name	Test Grade	Test Date	Print Test
1	District Assessment			<input checked="" type="checkbox"/>
2	Terra Nova			<input checked="" type="checkbox"/>

Refresh Tests from Referral

Summary of Current Assessments Refresh from MET

Please enter any current information regarding the student

---

**Summary of Present Levels of Academic Achievement and Functional Performance**

Strengths of Student (Academic, Behavioral, Learning Characteristics)

Needs as They Affect Learning

Effect of disability on Progress in the General Curriculum and Needs of Student to Access the General Curriculum

Refresh from MET

Medicaid Service Category Medicaid Service Code

Medicaid Service

Parent Input for Enhancing Child's Education Refresh from Parent Input

---

**Performance in General Education**

Refresh Current Performance from Referral

Additional Information:

Figure 3-113 IEP Screen PLAAFP Tab Elementary

1. If the student is a Secondary student and requires Transition Services, the Transition-based Assessment section displays on the IEP. For Elementary students not requiring Transition Services, skip to the Standardized Test section of this tab.



**Note:** Individual Districts can decide at what grade level to have the Transition section available in the IEP. The Synergy SE default is grades 9 – 12.

2. If you would like to include Transition Services for students who do not require it, check **Include Transition in IEP**.
3. Click .
4. Enter Assessment Results including Age-Appropriate Transition-based Assessments in the textbox provided.
5. Enter Measurable Postsecondary Goals for Training/Education, Employment and Independent Living Skill in the textboxes provided.

If the student has an existing IEP, there may be a Projected Course of Study added already. This section can be modified.

To add a Projected Course of Study:

6. Click the **Add** button on the Projected Course of Study bar. A new line displays.
7. Enter the **School Year** from the drop-down list.

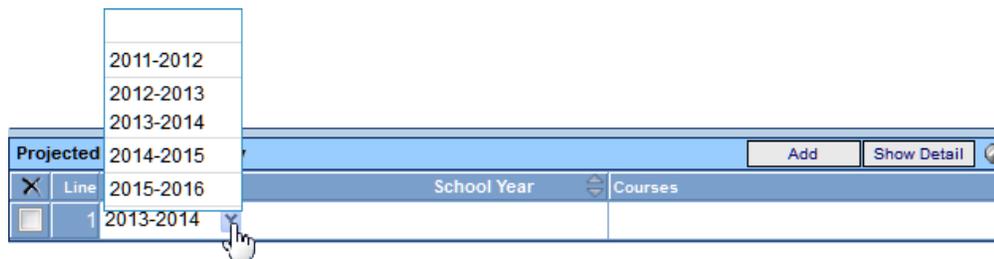


Figure 3-114 IEP Screen PLAAFP Tab Projected Course of Study School Year

8. Click .
9. Highlight the row by clicking on the **Line** number.
10. Click the **Show Detail** button. The detailed view displays on right.
11. Select the **Projected Course of Study** by selecting from the drop-down list, or type directly into the text box provided.
12. Add Courses by clicking on the **Add** button. A row displays.

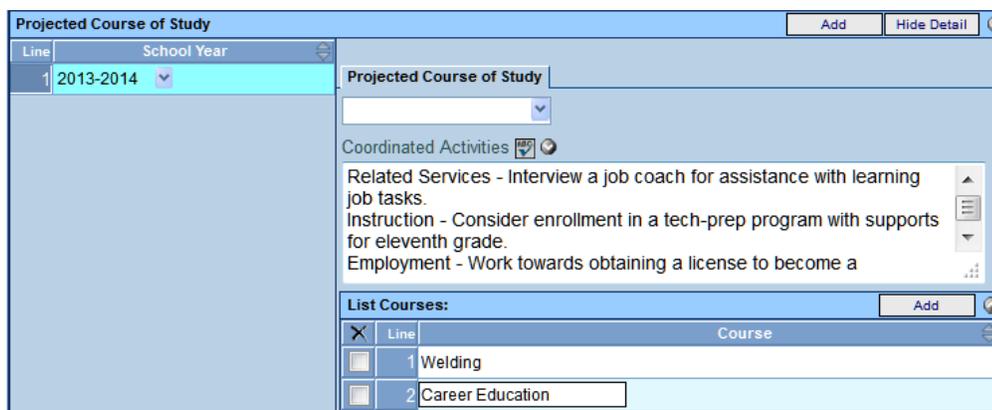


Figure 3-115 IEP Screen PLAAFP Tab Projected Course of Study Detailed View

13. Type directly into the textbox to name **Course**.
14. If needed, check  on the line of the **Course** to remove. The row is removed.

**Standardized Test Section (Elementary and Secondary IEPs)**

The State and District Testing contains tests used by the school district. Data in this grid will import from the Referral document or changes can be made directly to this document.

1. If changes have been made to the Standardized Tests since the IEP has been opened, click **Refresh from Referral**. (If there is no Referral document created or if this is an Annual Review IEP the button will not be available.) A confirmation screen displays.
2. Confirm Refresh Standard Tests from Referral by entering **Yes** and clicking the **Continue** button.

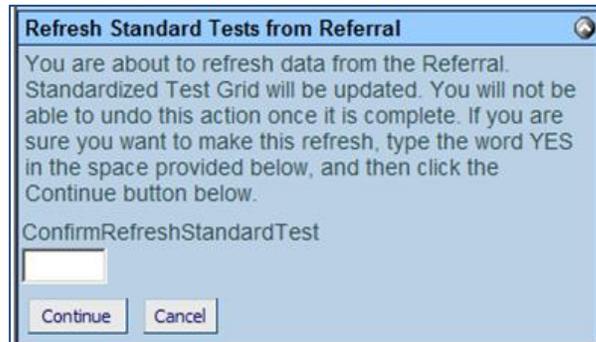


Figure 3-116 IEP Screen PLAAFP Tab Refresh Confirmation

3. Standardized Tests cannot be removed but can be set not to print on the printable documents. Remove the checkmark in the **Print Test** column on the test rows that will not be used.

Line	Test Name	Test Grade	Test Date	Print Test
1	District Assessment			<input type="checkbox"/>
2	Terra Nova			<input checked="" type="checkbox"/>
3	AIMS			<input checked="" type="checkbox"/>
4	AIMS-A			<input checked="" type="checkbox"/>

Figure 3-117 IEP Screen PLAAFP Tab Standard Test Print Selection

To add Standardized Test data:

4. Click the line of the **Test Name**. The line highlights.
5. Click the line again or click the **Show Detail** button.

Figure 3-118 IEP Screen PLAAFP Tab Standard Test Detail View

6. Add the grade from the **Test Grade** drop-down.
7. Enter the **Test Date** (MMDDYY) or click and select date..
8. Add Test Scores by clicking on the **Add** button on the Test Scores bar.
9. If needed, check on the line of the **Test Score** to remove. The row is removed.
10. Click **Save**.
11. Repeat instructions above to update each test.

12. Import data for the **Summary of Current Assessments** by clicking . (If there is no MET Report document created or if this is an Annual Review IEP the button will *not* be available.)
13. Enter any current information regarding the student's current assessments in the following textbox. Use  to spellcheck. Use  for more space.

The **Summary of Present Levels of Academic Achievement and Functional Performance in General Education** sections contain textboxes where descriptions and explanations are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

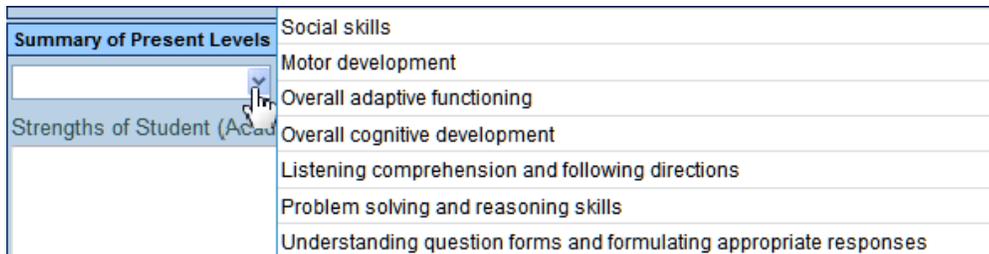


Figure 3-119 IEP Screen PLAAFP Tab Present Levels Stem Drop-down

14. Click on the drop-down box located above the textbox.
15. Select the desired key-word stem in the drop-down list.
16. The statement associated with the key-word stem selected displays in the textbox. Use  to spellcheck. Use  for more space.

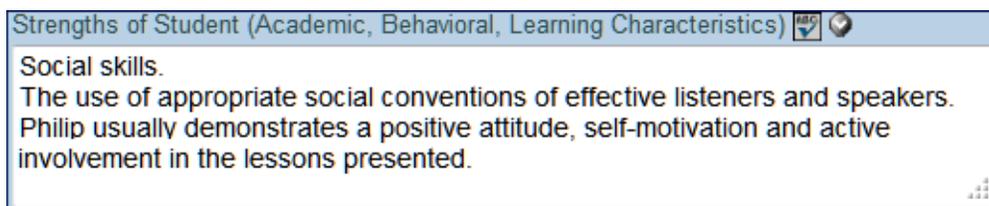


Figure 3-120 IEP Screen PLAAFP Tab Present Levels Statement Populated

OR Your screen may look like this:

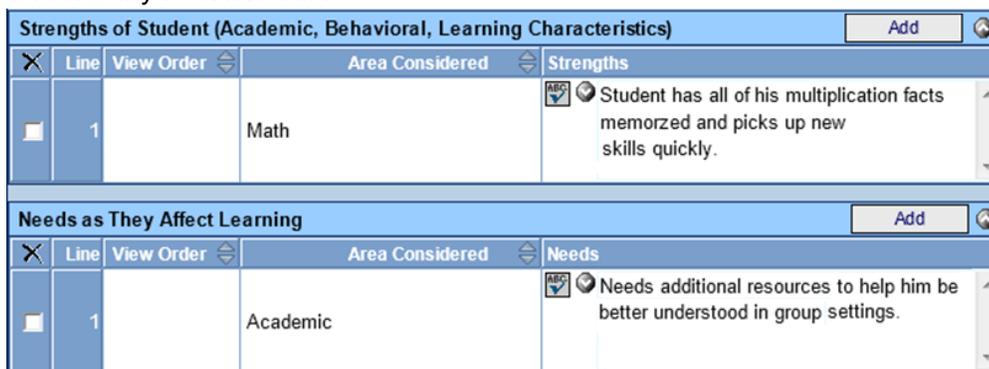


Figure 3-121 IEP Screen PLAAFP Tab Present Levels Alternate View

17. Click the **Add** button to add a new row.
18. Type in the **Area Considered** and the **Strengths** of the student..
19. Additional rows may be added until all areas have been added.

20. If needed, check  on the line of a row to remove. The row is removed.

Effect of Disability on Progress in the General Curriculum and Needs of Student to Access the General Curriculum is imported from the MET Report.

- 21. Additional data can be entered into this textbox.
- 22. If changes have been made to the MET Report since the IEP has been opened, click  (If there is no MET Report document created or if this is an Annual Review IEP the button will not be available.) A confirmation screen displays.

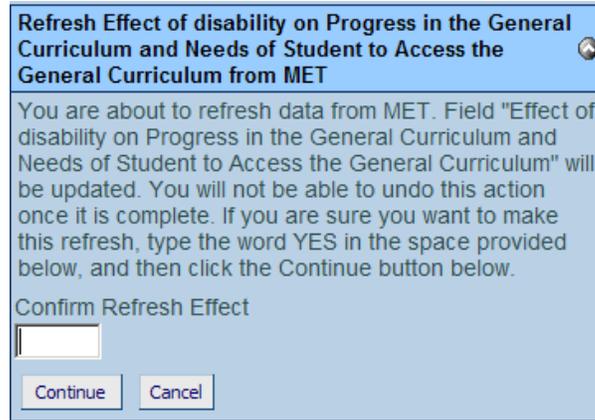


Figure 3-122 IEP Screen PLAAFP Tab Refresh Confirmation

- 23. Enter **YES** and click **Continue**.

(Medicaid Service times are set up and calculated in the Services tab.)

- 24. If any Medicaid Services are provided to the student, select from the **Medicaid Service Category** dropdown list to select a category.

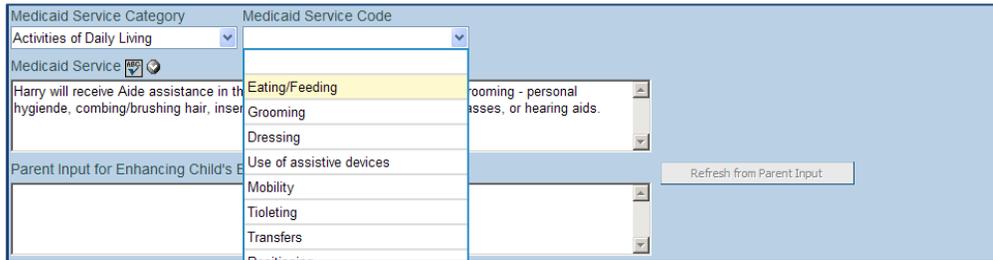


Figure 3-123 IEP Screen PLAAFP Tab Medical Services Stem Drop-down

Based on the Category selected from the dropdown box, the applicable service code statements become available in the Service Code dropdown box.

- 25. Select the appropriate **Service Code**. A statement based on the Category and Code selected displays in the Medicaid Service textbox.
- 26. The statement can be edited directly in the textbox, if desired.



Figure 3-124 IEP Screen PLAAFP Tab Medical Services Statement Completed

Parent Input for Enhancing Child’s Education is imported from the Parent Input document. Additional data can be entered into this textbox.

1. If changes have been made to the Parent Input document since the IEP has been opened, click **Refresh from Parent Input**. (If there is no Parent Input document created or if this is an Annual Review IEP the button will not be available.) A confirmation screen displays.

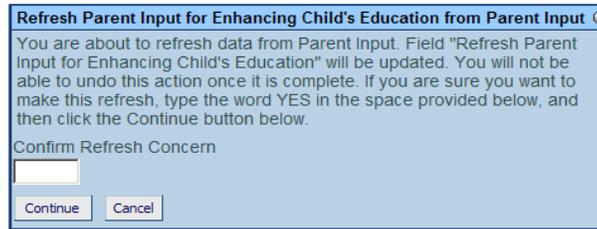


Figure 3-125 IEP Screen PLAAFP Tab Refresh Confirmation

2. Enter **Yes** and click **Continue**.

Performance in General Education is imported in from the Referral document.

3. If changes have been made to the Referral document since the IEP has been opened, click **Refresh Current Performance from Referral**.
4. To view the student’s Current Performance click the **Show Detail** button.

All performance entries will be viewable as read only items. If changes are needed they will have to be made in the Referral document.

If this is an Annual Review IEP there will be no Referral document so the button will not be available.

5. An **Additional Information** textbox is available for summarization, if needed.

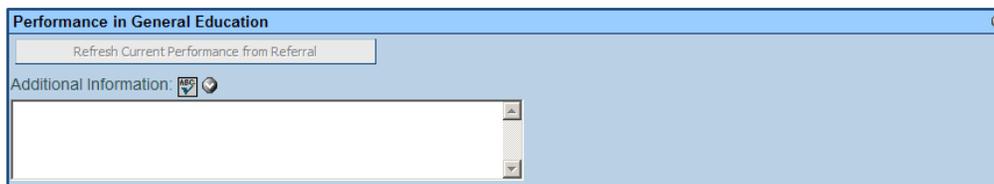
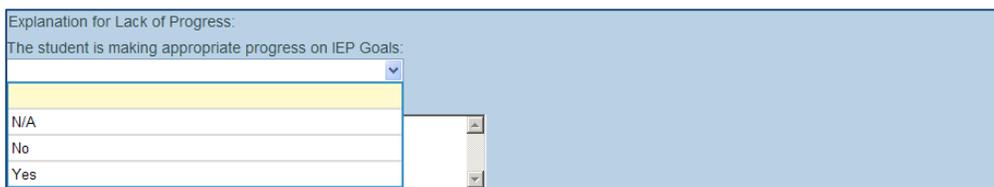


Figure 3-126 IEP Screen PLAAFP Tab Performance in General Education

6. Enter **Progress on IEP Goals** in the textbox provided.
7. Select if the student is making appropriate progress on IEP goals from the drop-down list.
8. If **No** is selected, enter **Explanation for Lack of Progress** in the textbox provided.



PRESCHOOL STUDENTS



Figure 3-128 IEP Screen PLAAFP Tab Preschool

1. Select the appropriate response from the drop-down provided. The statement displays in the editable textbox.

**SPECIAL CONS. TAB**

(Special Considerations)

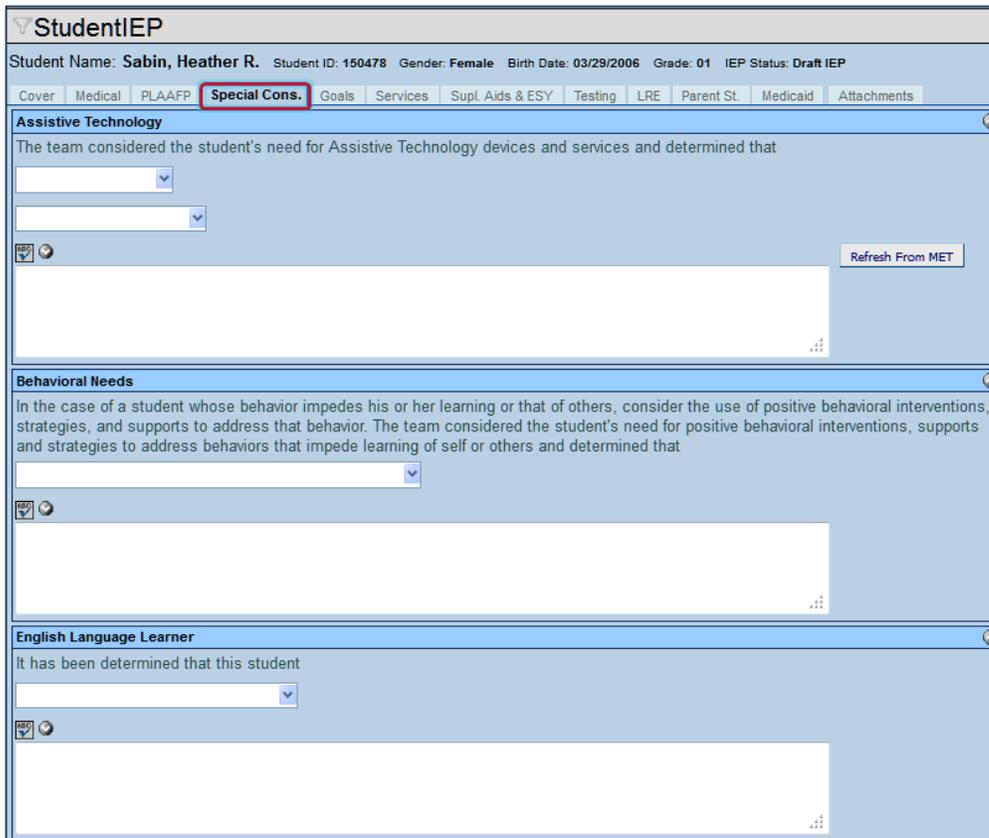


Figure 3-129 IEP Screen Special Cons. Tab

1. If changes have been made to the MET document since the IEP has been opened, click [Refresh from MET](#). (If the MET document has not been created or if this is an Annual Review IEP the button will not be available.) A confirmation screen displays.

2. Type **Yes** and click **Continue**.



Figure 3-130 IEP Screen Special Cons. Tab Confirmation Window

3. Select if Assistive Technology **is or is not necessary** from the drop-down list.
4. If Assistive Technology is necessary, select the Technology options from the drop-down list. The statement will populate the textbox.

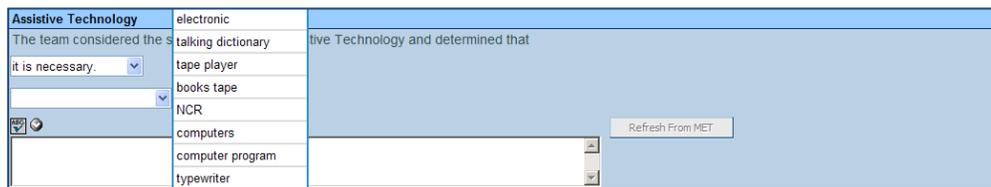


Figure 3-131 IEP Screen Special Cons. Tab Assistive Technology

5. Select if school and classroom rules **should or should not** be applied from the drop-down list.

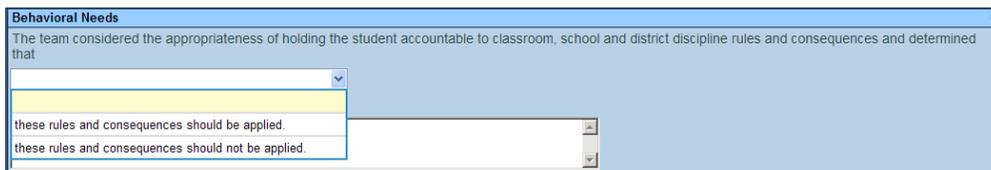


Figure 3-132 IEP Screen Special Cons. Tab Discipline Rules

6. Select if a Behavioral Intervention Plan **is or is not necessary**. (The BIP is available in the Ad Hoc Documents).



Figure 3-133 IEP Screen Special Cons. Tab Behavioral Intervention Plan Consideration

7. Select if the student **is or is not an English Language Learner** from the drop-down list.



Figure 3-134 IEP Screen Special Cons. Tab ELL

8. Select if Braille services **are or are not needed** for the student from the drop-down list.

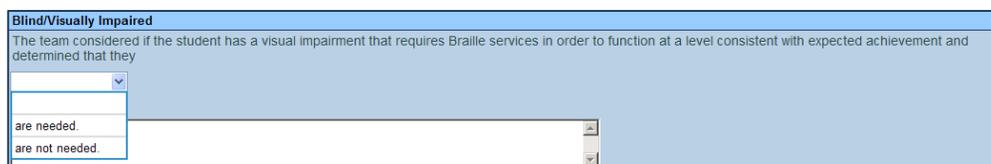


Figure 3-135 IEP Screen Special Cons. Tab Braille

9. Select if the communication needs **are or are not** necessary for the student from the drop-down list.

Figure 3-136 IEP Screen Special Cons. Tab Deaf and Hearing Impaired

10. Select if other communication services, supports and goals **are or are not** necessary for the student.

Figure 3-137 IEP Screen Special Cons. Tab Communication

11. Select if the student **is or is not** in need of related services from the drop-down list.

Figure 3-138 IEP Screen Special Cons. Tab Related Service

12. Click .

## GOALS TAB

Goals added to this IEP will be available in the student's Progress Report once this IEP is finalized.

1. Add the **Grading Periods** dates for Progress Reports. (MMDDYY) or click  and select date.
2. Click the **Add** button on the grading Periods bar. A new line displays.

Line	Grading Period Label	Grading Period
1	1st Grading Period	09/30/2010
2	2nd Grading Period	11/24/2010

Figure 3-139 IEP Screen Goals Tab Progress on Goals

3. Label the **Grading Period** as desired, (1st Grading Period, 1st Grading Quarter, etc.)
4. Enter the date for the **Grading Periods** (MMDDYY) or click  and select date.
5. If needed, check  on the line of the **Grading Periods** record to remove. The row is removed.

ADDING GOALS

Goals can be added to the IEP in five ways:

- **New Blank Goal**
- **Goal Library**
- **Personal Goal Library**

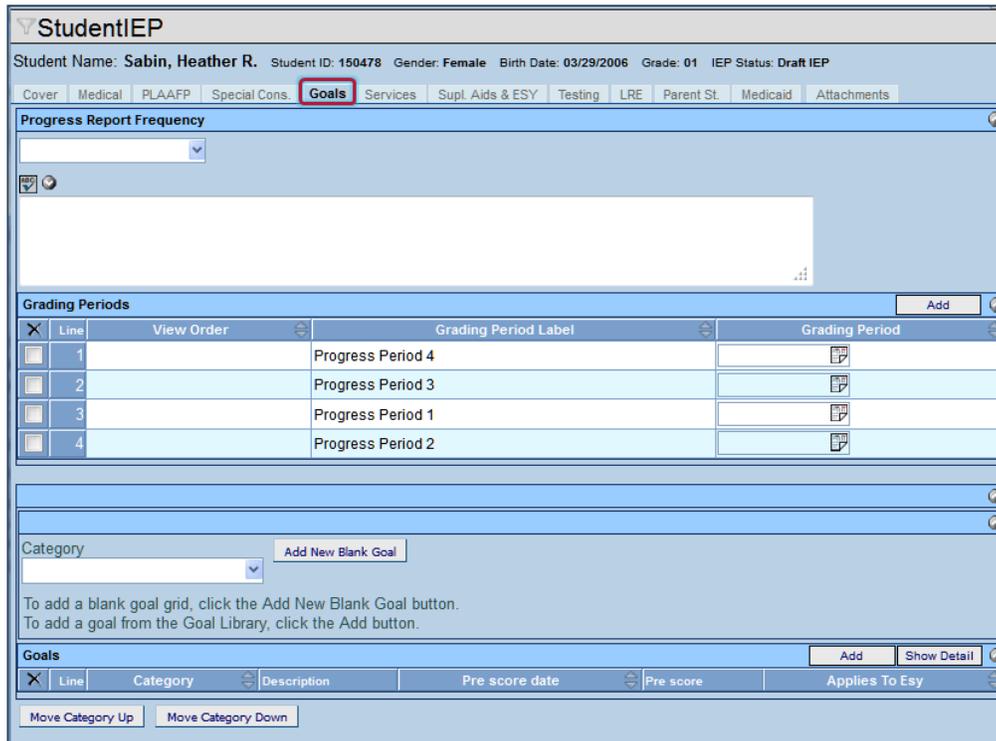


Figure 3-141 IEP Screen Goals Tab

- **Goal Builder**
- **Standard Goal Library**

**NEW BLANK GOAL**

1. Select the goal **Category** from the drop-down box.
2. Click **Add New Blank Goal**. A new row is now added to the Goals section.

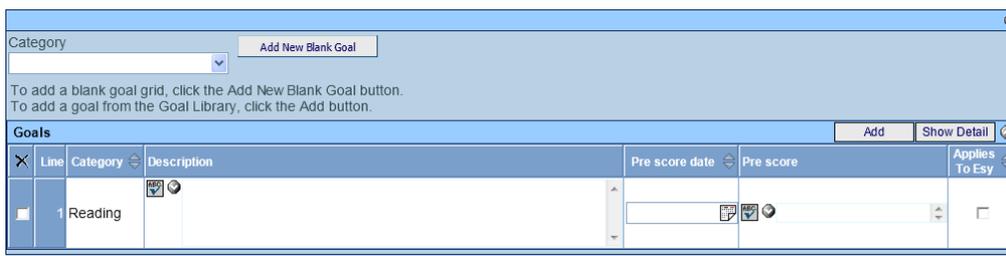


Figure 3-140 IEP Screen Goals Tab Add New Blank Goal

3. Type the goal in the **Description** textbox. Use  to spellcheck. Use  for more space.
4. Add the **Goal Pre score date** (MMDDYY) or click  and select date.
5. Type the **Pre score** information.
6. If this goal will apply to ESY place a check in the **Applies To ESY** column. By placing a checkmark in this area, the goal will then be imported into appropriate fields the ESY Progress Report and ESY Addendum – GENAZ 505.
7. Repeat above directions to add additional goals.
8. If needed, check  on the line of the **Goal** record to remove. The row is removed.
9. Click on the line of the goal. The line highlights.

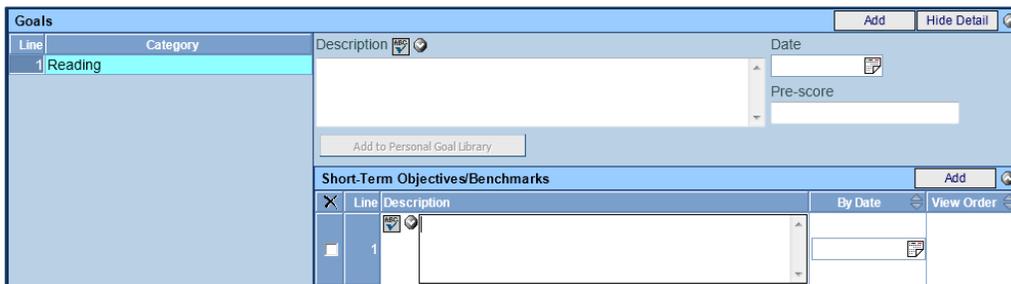


Figure 3-142 IEP Screen Goals Tab Detail View

10. Click the **Show Detail** button. The detail view displays on the right.
11. Click the **Add** button on the Short-term Objectives/Benchmarks bar. A new line is added..
12. Enter the Short-Term Objectives/Benchmarks information in the **Description** textbox. Use  to spellcheck. Use  for more space.
13. Insert the **By Date**, (MMDDYY) or click  and select date when the student will meet the Short-Term Objective/Benchmark.
14. Type a number to indicate **View Order** you would like the Short-Term Objective/Benchmark to appear.
15. Repeat above directions to add additional Short-Terms Objectives.
16. If needed, check  on the line of the **Short-Terms Objective** to remove. The row is removed.
17. Click the **Hide Detail** button to close the detailed view.

**GOAL LIBRARY**

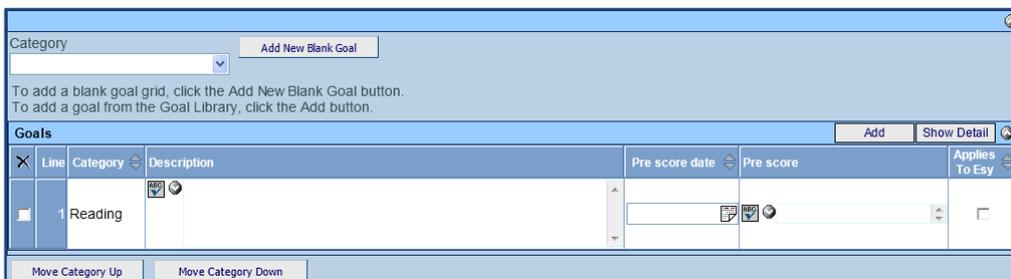


Figure 3-143 IEP Screen Goals Tab Add Goal

1. Click the **Add** button on the Goals bar. The Goal Library Search screen opens.
2. Click the **Category** drop-down and select.

3. Click the **Sub Category** drop-down and select.
4. Click the **Find** button. The goals matching the criteria selected displays.

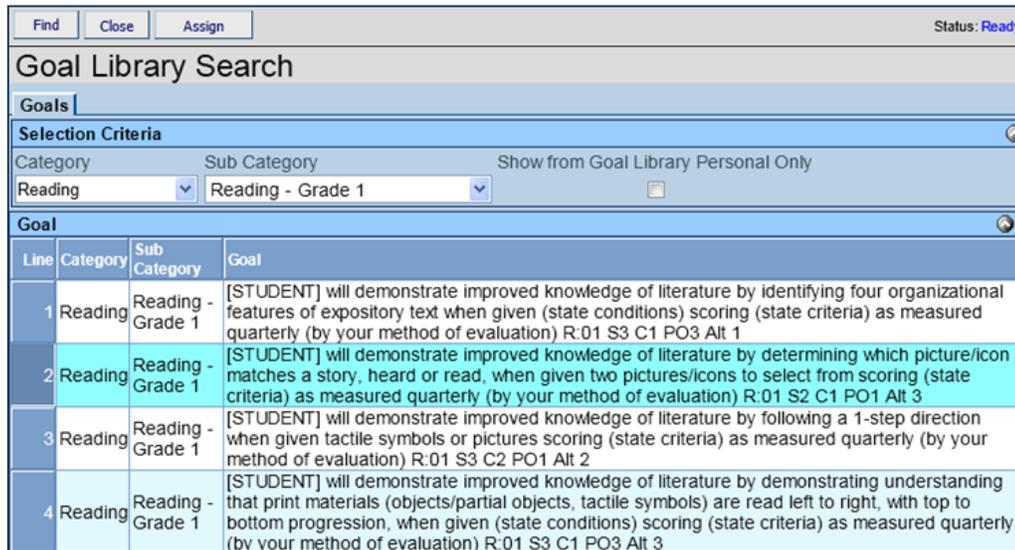


Figure 3-144 IEP Screen Goals Tab Assign Goal

5. Click anywhere on the line of the appropriate goal. The line highlights.
6. Click the **Assign** button to add the selected goal to the student’s IEP. A pop-up window displays containing the goal and stating that the goal has been added successfully to the IEP.
7. Click **OK**.
8. The Goal Library Search screen will remain open, allowing for additional goals to be added. When all goals have been added, close this window. The selected goals will populate in the IEP.
9. The goals are contained in editable textboxes. Edit the criteria as necessary. Use to spellcheck. Use for more space.
10. Add **Pre score date** and **Pre score** in textboxes provided.
11. Place a check in the **Applies to ESY** column checkbox, if this goal should apply to ESY. The selected goal will be imported into the ESY Progress Report and the ESY Addendum – GENAZ 505.
12. Click on the line of the goal. The line highlights.

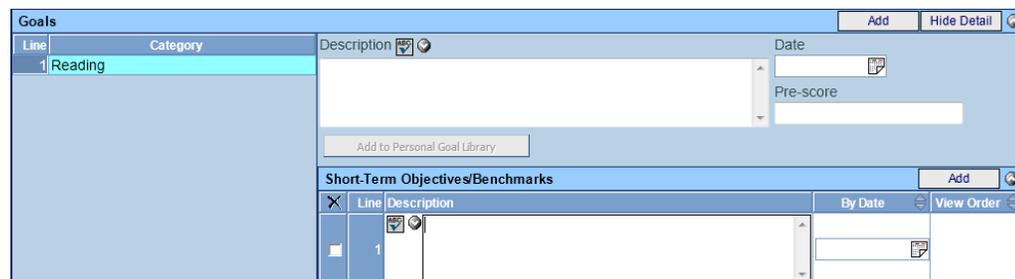


Figure 3-145 IEP Screen Goals Tab Detail View

13. Click the **Show Detail** button. The detail view displays on the right.
14. Click the **Add** button on the Short-term Objectives/Benchmarks bar. A new line is added..
15. Enter the Short-Term Objectives/Benchmarks information in the **Description** textbox. Use to spellcheck. Use for more space.

16. Insert the **By Date**, (MMDDYY) or click  and select date when the student will meet the Short-Term Objective/Benchmark.
17. Type a number to indicate **View Order** you would like the Short-Term Objective/Benchmark to appear.
18. Repeat above directions to add additional Short-Terms Objectives.
19. If needed, check  on the line of the **Short-Terms Objective** to remove. The row is removed.
20. Click the **Hide Detail** button to close the detailed view.

**PERSONAL GOAL LIBRARY**

Before adding a goal from your Personal Goal Library you must first add goals to your library. Goals are added to your Library after you have added commonly used goals to you IEP.

1. To add goals to your Personal Goal Library, open an IEP you have already completed with the desired goals:
2. Click on the line of the goal. The row highlights.
3. Click the **Show Detail** button. The detail view displays on the right.
4. Click . The Goal Personal Library window opens allowing you to edit the goal selected. State Standards and Benchmarks may be added in this section to allow for easier Goal adding.

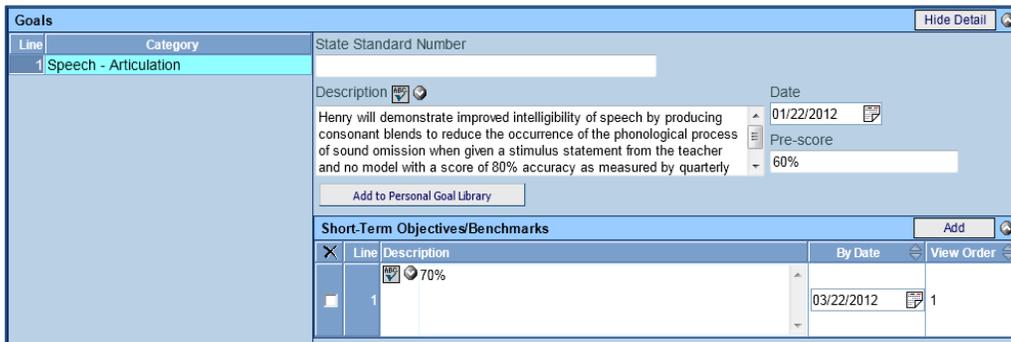


Figure 3-146 IEP Screen Goals Tab Add to Personal Goal Library

5. Click .

Once you have added goals to your Personal Goal Library they are available for use.

6. Click the **Add** button on the Goals bar. The Goal Library Search screen opens.
7. Click the **Category** drop-down list and select.

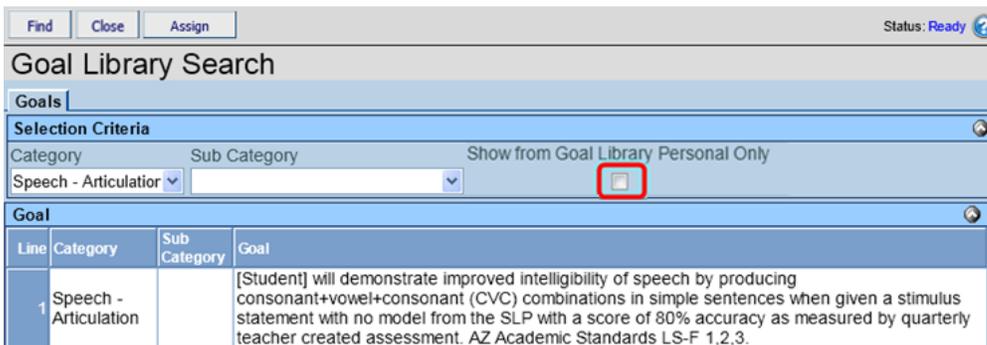


Figure 3-147 IEP Screen Goals Tab Goal Library Personal Only

8. Click on the Show from Goal Library Personal Only checkbox.

9. Click **Find**. The goals matching the criteria selected displays
10. Select the appropriate goal by highlighting the goal statement anywhere in the row.
11. Click  to add the selected goal to the student's IEP.

A pop-up window displays containing the goal stating that the goal has been added successfully to the IEP.

12. Click **OK**. The Goal Library Search Window will remain open allowing for additional goals to be added.
13. When all goals have been added, close this window. The selected goals will populate in the IEP.

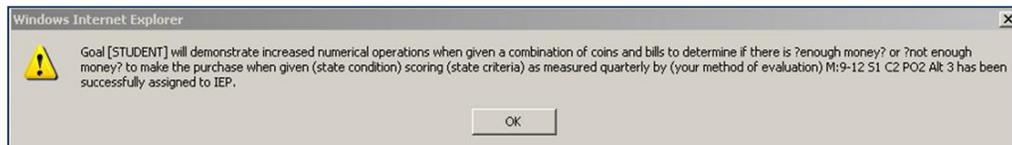


Figure 3-148 IEP Screen Goals Tab Goal Added Successfully

14. The goals are contained in editable textboxes. Edit the criteria as necessary.
15. Add **Pre score date** and **Pre score** in textboxes provided.
16. Place a check in the **Applies to ESY** column if this goal should apply to ESY. The selected goal will be imported into the ESY Progress Report and the ESY Addendum – GENAZ 505.
17. Click on the line of the goal. The line highlights.
18. Click the **Show Detail** button. The detail view displays on the right.
19. Click the **Add** button on the Short-term Objectives/Benchmarks bar. A new line is added..
20. Enter the Short-Term Objectives/Benchmarks information in the **Description** textbox. Use  to spellcheck. Use  for more space.
21. Insert the **By Date**, (MMDDYY) or click  and select date, of when the student will meet the Short-Term Objective/Benchmark.
22. Type a number to indicate **View Order** you would like the Short-Term Objective/Benchmark to appear.
23. Repeat above directions to add additional Short-Terms Objectives.

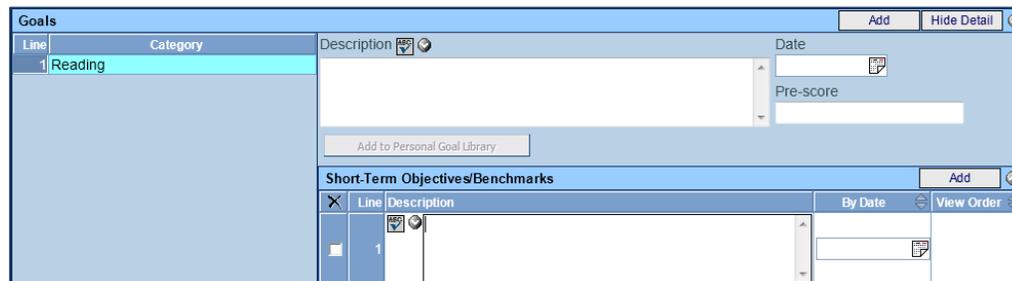


Figure 3-149 IEP Screen Goals Tab Detailed View

24. If needed, check  on the line of the **Short-Terms Objective** to remove. The row is removed.
25. Click the **Hide Detail** button to close the detailed view.

**GOAL BUILDER**

1. Select the goal **Category** using the available categories in the drop-down box.
2. Type in the **Timeframe** for the goal.
3. Type in the **Condition** for the goal.
4. Type in the **Behavior** for the goal.
5. Type in the **Criterion**.

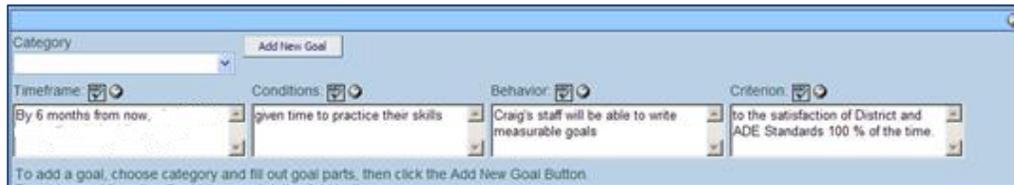


Figure 3-150 IEP Screen Goals Tab Goal Builder

6. Click the **Add New Goal** button. The goal builder automatically combines the entered information into a complete goal in the Goals Section.

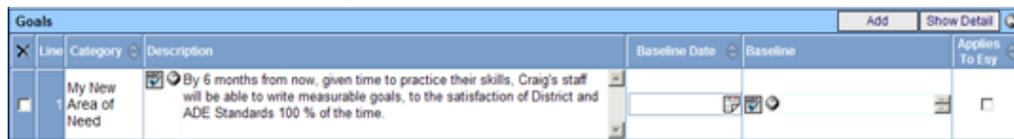


Figure 3-151 IEP Screen Goals Tab Goal Builder Completed

7. Add **Baseline Date** (MMDDYY) or click  and select date.
8. Enter **Baseline** in the textbox provided.
9. Place a check in the **Applies to ESY** column if this goal should apply to ESY. The selected goal will be imported into the ESY Progress Report and the ESY Addendum – GENAZ 505.

10. If needed, check  on the line of the **Goal** to remove. The row is removed.
11. Click on the line of the goal. The line highlights.

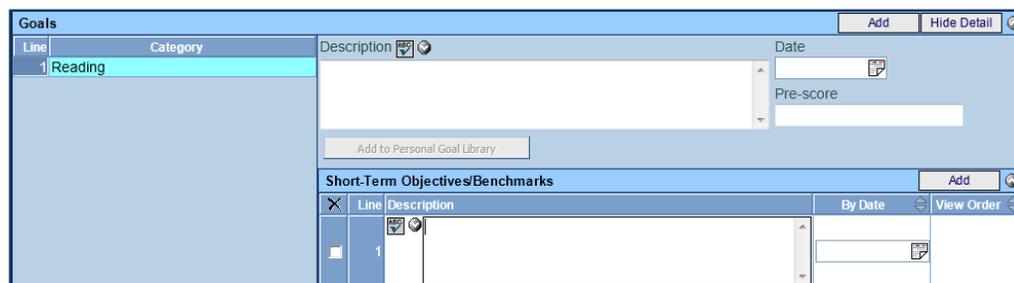


Figure 3-152 IEP Screen Goals Tab Detailed View

12. Click the **Show Detail** button. The detail view displays on the right.
13. Click the **Add** button on the Short-term Objectives/Benchmarks bar. A new line is added..
14. Enter the Short-Term Objectives/Benchmarks information in the **Description** textbox. Use  to spellcheck. Use  for more space.
15. Insert the **By Date**, (MMDDYY) or click  and select date, of when the student will meet the Short-Term Objective/Benchmark.
16. Type a number to indicate **View Order** you would like the Short-Term Objective/Benchmark to appear.
17. Repeat above directions to add additional Short-Terms Objectives.

18. If needed, check  on the line of the **Short-Terms Objective** to remove. The row is removed.
19. Click the **Hide Detail** button to close the detailed view.

**STANDARD GOAL LIBRARY**

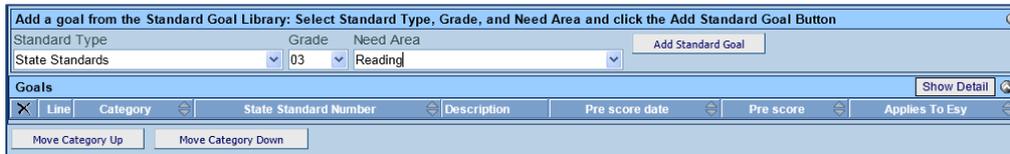


Figure 3-153 IEP Screen Goals Tab Standard Goal Library

1. From the **Standard Type** drop-down select the standard area for the goal.
2. Select the **Grade** level of the standard to add using the drop-down.
3. Select the **Need Area** from the drop-down.
4. Click the **Add Standard Goal** button. The Standard window will open.
5. Click on  next to the desired standard. The performance objectives display below and  turns to .

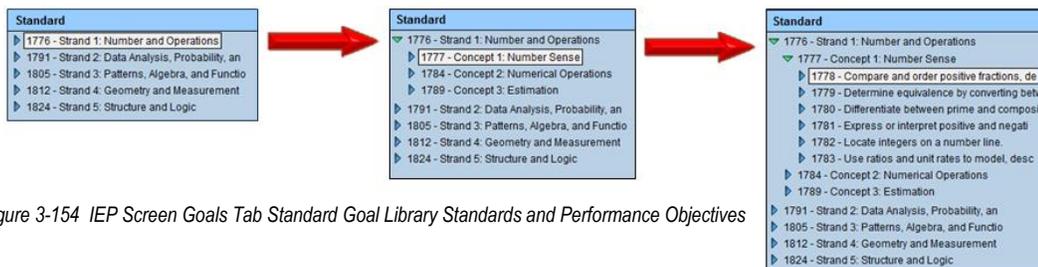


Figure 3-154 IEP Screen Goals Tab Standard Goal Library Standards and Performance Objectives

6. Click on the desired performance objective.
7. Check the goals desired in the **Add** column.
8. Click Add Goals.

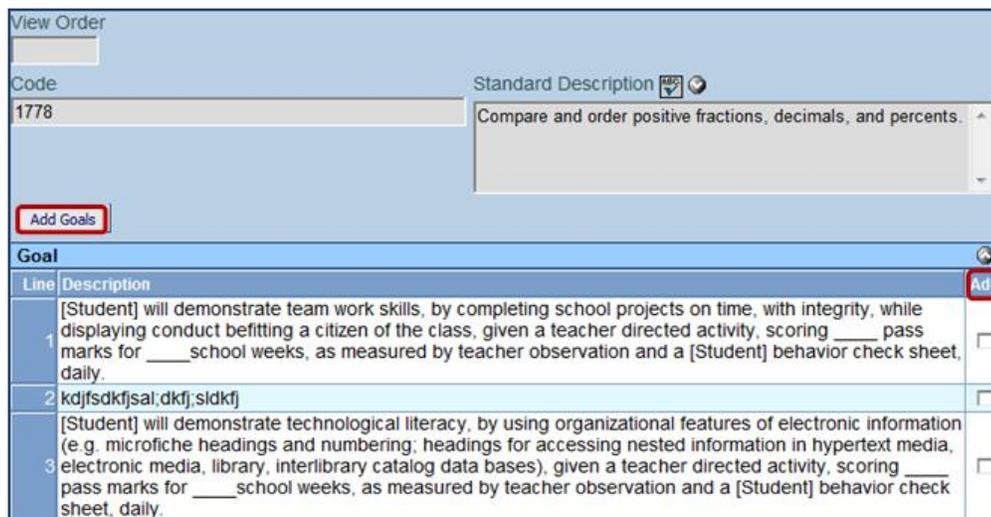


Figure 3-155 IEP Screen Goals Tab Add Goals

9. A pop-up message displays for each added goal letting you know that the goal(s) has/have been successfully assigned to the IEP. Click the **OK** button to close the message.

10. Close the **Standard** screen. The goals have now been added and are ready for editing.

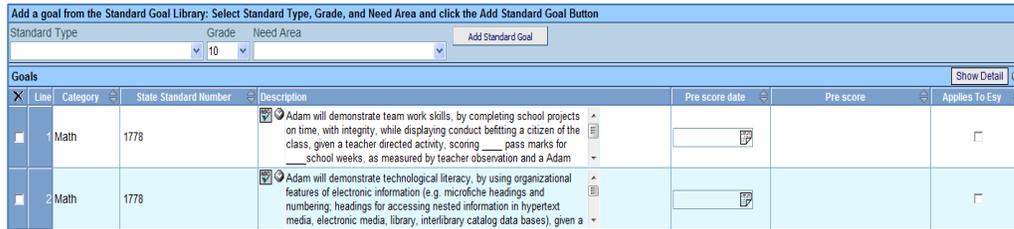


Figure 3-156 IEP Screen Goals Tab Goals Added

Goals will automatically be sorted by Category. The order of categories can be changed.

11. Click the line number of a goal. The goal highlights.

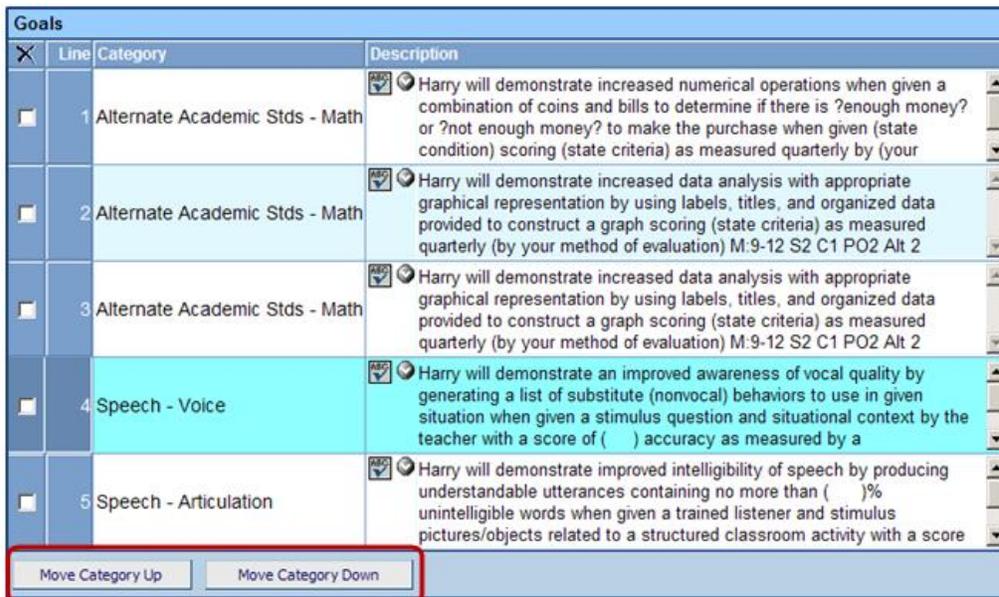


Figure 3-157 IEP Screen Goals Tab Sort

12. Click **Move Category Up** or **Move Category Down** to move the goal to the top or bottom of the Goals list.

13. Click .

**SERVICES TAB**

Services will display the type, location and duration of special education services provided to the student. If the service is a Medicaid Billable service it will calculate the service hours.

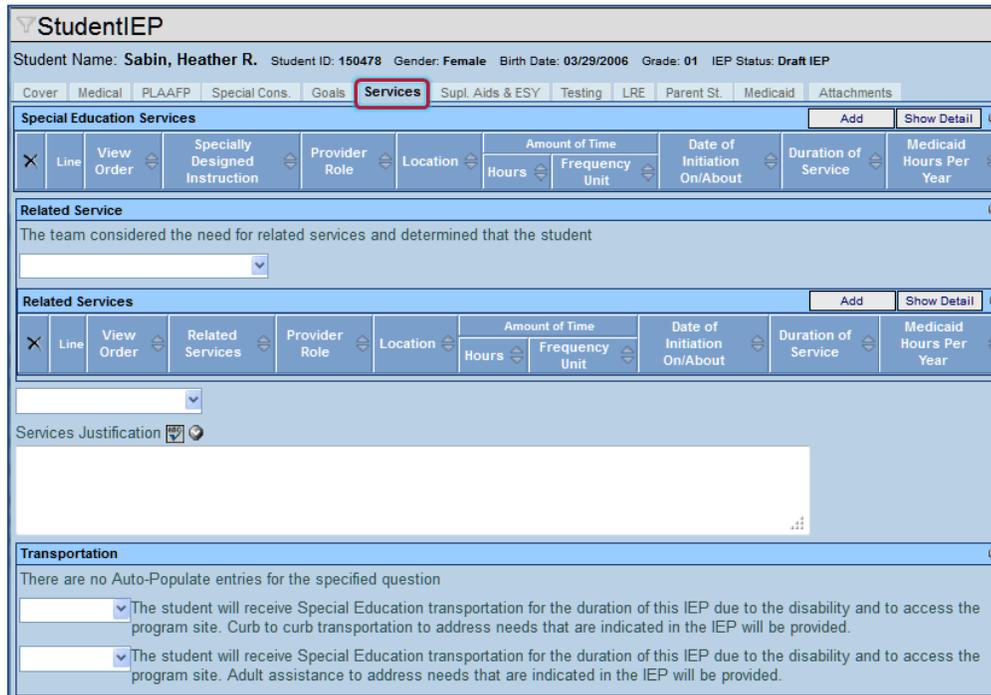


Figure 3-158 IEP Screen Services Tab

1. Click the **Add** button to add a new special education service. A new row displays.
2. Click the **Provider Role** drop-down box and select the appropriate provider.
3. Click the **Location** drop-down box and select the appropriate location.
4. Enter the **Amount of Time** using quarter hour increments in the **Hours** textbox. (i.e., 2.25, 5.50, 3.75, etc.)
5. Select the correct **Frequency Unit** using the options in the frequency drop-down box.
6. Enter **Date of Initiation On/About** (MMDDYY) or click and select date.
7. Enter **Duration of Service** (MMDDYY) or click and select date. If left blank, upon saving, the Duration of Service automatically populates the date, calculated for the next IEP (1 year minus 1 day).

Special Education Services									
X	Line	View Order	Specially Designed Instruction	Provider Role	Location	Amount of Time		Date of Initiation On/About	Medicaid Hours Per Year
						Hours	Frequency Unit		
	1		Advocacy Skills	Special Ed T	Special Ed Class	2.50	per week	07/06/2012	

Figure 3-159 IEP Screen Services Tab Duration of Service

If the service added is Medicaid billable the Medicaid Hours Per Year will automatically calculate and be entered into the Medicaid Column.

8. Click line of **Specially Designed Instruction**. Line highlights.
9. Click again or click **Show Detail**. The detailed view displays on right.
10. Select the **Detail Description Code** using the drop-down statement box.

11. Type in the **Detail Description**. Use  to spellcheck. Use  for more space.

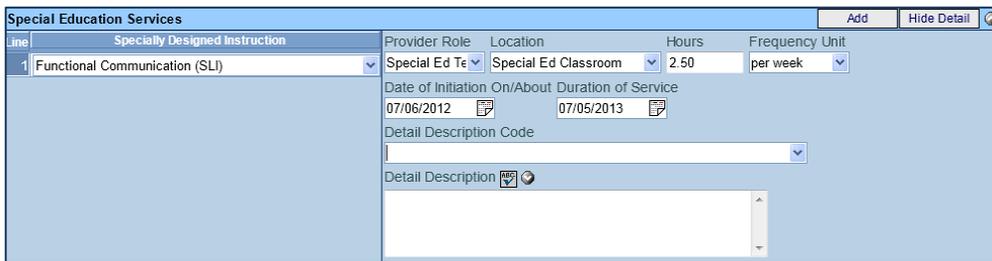


Figure 3-160 IEP Screen Services Tab Specifically Designed Instruction

12. Click **Hide Detail** to close the detailed view.

Related Services

- 13. Click the drop-down in the **Related Service** box and complete the statement.
- 14. If the student is not in need of Related Services, move on to the Transportation section.

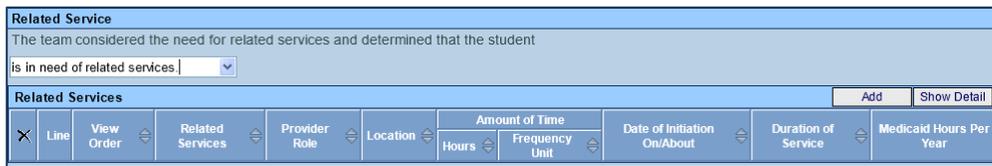


Figure 3-161 IEP Screen Services Tab Related Service Statement

- 15. If the student requires Related Services, click **Add** on the Related Services bar.
- 16. Click the **Related Service** drop-down and select.
- 17. Click the **Provider Role** drop-down box and select.

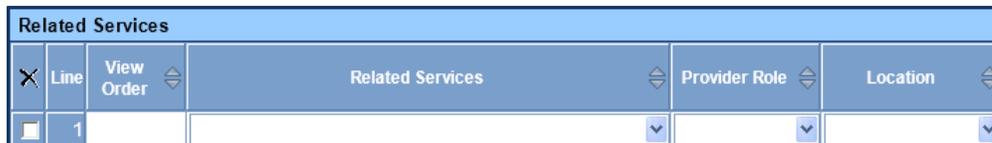


Figure 3-162 IEP Screen Services Tab Related Service

- 18. Click the **Location** drop-down and select.
- 19. Enter the **Amount of Time** using quarter hour increments in the **Hours** textbox. (i.e., 2.25, 5.50, 3.75, etc.)
- 20. Select the correct **Frequency Unit** using the options in the frequency drop-down box.
- 21. Enter **Date of Initiation On/About** (MMDDYY) or click  and select date.
- 22. Enter **Duration of Service** (MMDDYY) or click  and select date. If left blank, upon saving, the Duration of Service automatically populates the date, calculated for the next IEP (1 year minus 1 day). Enter the Amount of Time using quarter hour increments in the Hours textbox. (i.e., 2.25, 5.50, 3.75, etc.)

If the related service is Medicaid billable, the Medicaid Hours Per Year will automatically populate, based upon the Amount of Time selected and the Duration of Service.



Figure 3-163 IEP Screen Services Tab Medicaid Hours Per Year

23. Click the **Services Justifications** drop-down and select. The statement will populate the textbox below. Custom statements may be added directly to the textbox, also.

Figure 3-164 IEP Screen Services Tab Services Justifications

24. After reading the text in the transportation section, answer **Yes** or **No** to each statement using the drop-downs. If **No** is selected, continue to the Services Tab. If **Yes** is selected to either statement, additional fields display.
25. In the second section, select **Yes** or **No** from The student requires... drop-down box.

Figure 3-165 IEP Screen Services Tab Transportation Section

26. Check if the **Student requires transportation in an adapted vehicle**. If selected, either type in a **Description** of the necessary vehicle adaptations or select the appropriate statements from drop-down box. As many adaptations may be selected as needed using the drop-down statements.
27. Check if the **Student has behavioral problems and must be transported separately from non-disabled students**. If selected, either type in a **Description** of the behavioral concerns or select the appropriate statements from drop-down box. As many behavioral concerns may be selected as needed using the drop-down statements.
28. Click [Save](#).

These are Medicaid Billable items that, if selected, will reflect on the Consent to Claim Medicaid Reimbursement that prints with the IEP.

**SUPL. AIDES AND ESY TAB**

(Supplementary Aides and Extended School Year)

StudentIEP

Student Name: **Sabin, Heather R.** Student ID: 150478 Gender: Female Birth Date: 03/29/2006 Grade: 01 IEP Status: Draft IEP

Cover Medical PLAAFP Special Cons. Goals Services **Supl. Aids & ESY** Testing LRE Parent St. Medicaid Attachments

**Supplemental Aids and Services**

Need for Aids and Services

Supplementary Aids and Services Add

X Line Order Service Description Location Frequency/Amount of Time Date of Initiation On/About Duration of Service

Need for Program Modifications

**Program Modifications and/or Supports for School Personnel** Add

X Line Order Service Description Location Frequency/Amount of Time Date of Initiation On/About Duration of Service

**Accommodations**

Accommodation Category Accommodation Category Detail

Accommodation Description Refresh From MET

**Extended School Year**

The team considered the need for ESY

Student has received ESY services in the past

Describe the most recent services and what year(s) they were provided

Figure 3-166 IEP Screen Supl. Aides and ESY Tab

1. Click the **Need for Aids and Services** drop-down and select if Supplemental Aides and Services are required.
2. If there is a Need for Aids and Services, click **Add**. A new line displays on grid.
3. Type in the **Order** number.

Supplementary Aids and Services							
X	Line	Order	Service Description	Location	Frequency/Amount of Time	Date of Initiation On/About	Duration of Service
	1						

Figure 3-167 IEP Screen Supl. Aides and ESY Tab Supplementary Aides and Services

4. Type in the Service Description.
5. Click the **Location** drop-down box and select the appropriate location.
6. Enter the **Amount of Time** using quarter hour increments in the **Hours** textbox. (i.e., 2.25, 5.50, 3.75, etc.)
7. Enter the **Frequency/Amount of Time** that is needed in the Frequency/Amount of Time textbox. (ex. 3 hours/per day).
8. Enter **Date of Initiation On/About** (MMDDYY) or click and select date.
9. Enter **Duration of Service** (MMDDYY) or click and select date. If left blank, upon saving, the Duration of Service automatically populates the date, calculated for the next IEP (1 year minus 1 day).

Line	Order	Service Description	Location	Frequency/Amount of Time	Date of Initiation On/About	Duration of Service
1						

Figure 3-168 IEP Screen Supl. Aides and ESY Tab Program Modifications and Supports

10. Click the **Need for Program Modifications** drop-down and select appropriate statement.
11. If there is a **Need for Program Modifications**, click **Add**. A new line displays on grid.
12. Type in the **Order** number.
13. Type in the **Service Description**.
14. Click the **Location** drop-down box and select the appropriate location.
15. Enter the **Amount of Time** using quarter hour increments in the **Hours** textbox. (i.e., 2.25, 5.50, 3.75, etc.)
16. Enter the **Frequency/Amount of Time** that is needed in the Frequency/Amount of Time textbox. (ex. 3 hours/per day).
17. Enter **Date of Initiation On/About** (MMDDYY) or click and select date.
18. Enter **Duration of Service** (MMDDYY) or click and select date. If left blank, upon saving, the Duration of Service automatically populates the date, calculated for the next IEP (1 year minus 1 day).

The Accommodations from the MET Report can be imported into this section.

19. Click the **Refresh From MET** button to import.
20. From the **Accommodations** drop-down list specify if accommodations are necessary for the student.

Figure 3-169 IEP Screen Supl. Aides and ESY Tab Accommodations Necessary

21. If **No accommodations are necessary** is selected, move down to Program Supports for School Personnel.
22. If The following accommodations are necessary..... is selected, click the **Accommodation Category** drop-down and select.
23. Select the specific accommodation from the **Accommodation Category Detail** drop-down list. The accommodations displays in the Accommodation Description textbox. Data can be edited.

Figure 3-170 IEP Screen Supl. Aides and ESY Tab Accommodation Detail

- Click **The Team considered the need for ESY** drop-down and select the appropriate statement from the drop-down list.

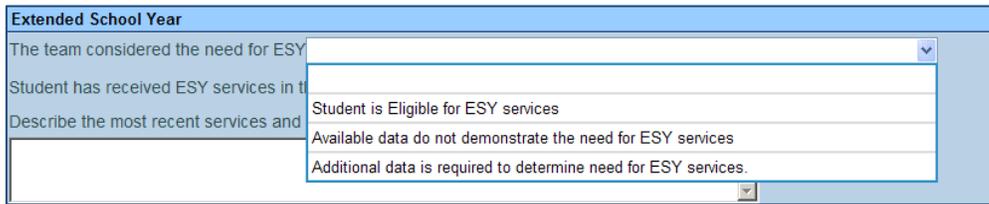


Figure 3-171 IEP Screen Supl. Aides and ESY Tab ESY Consideration

- Click **Student has received ESY services in the past** drop-down and select No or Yes.

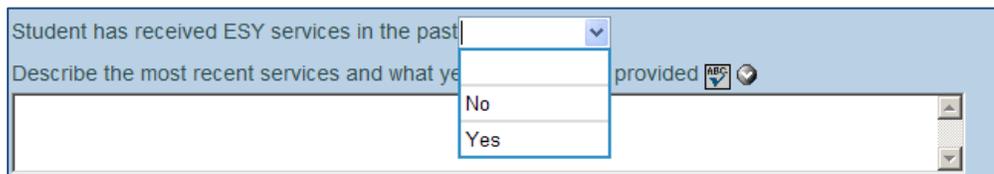


Figure 3-172 IEP Screen Supl. Aides and ESY Tab ESY Statement

- Enter a description of the most recent services. Use to spellcheck. Use for more space.
- Click **Save**.

**TESTING TAB**

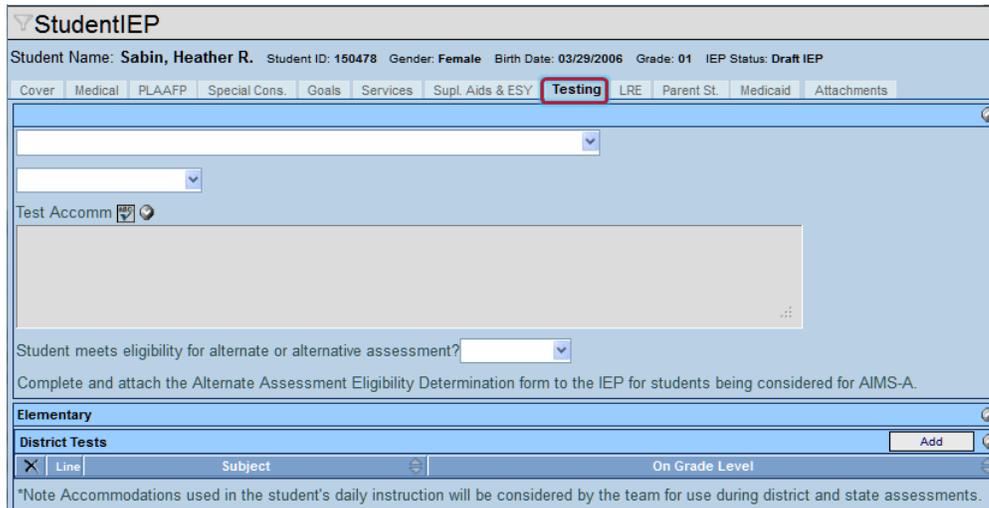


Figure 3-173 IEP Screen Testing Tab

**PRESCHOOL STUDENTS**

No testing is required for Preschool students.

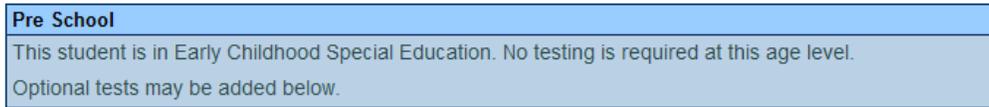


Figure 3-174 IEP Screen Testing Tab Pre School Statement

**ELEMENTARY AND SECONDARY STUDENTS**

The Testing tab opens with the **Test Accomm** textbox grayed out.

28. Click the first drop-down and select if this student will participate **with** or **without** accommodations.

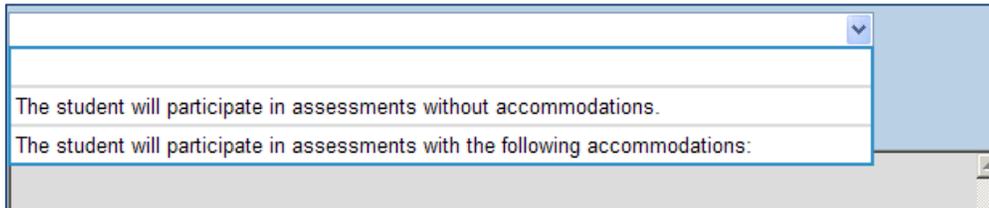


Figure 3-175 IEP Screen Testing Tab Accommodations Statement

29. Click **Save**.

If "The student will participate...with the following accommodations" was selected, the textbox will now be editable.

30. Select the appropriate **Test Accommodation** from the drop-down list.

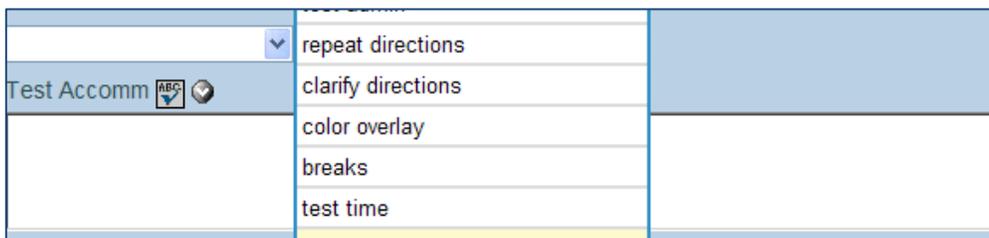


Figure 3-176 IEP Screen Testing Tab Test Accommodation Drop-down

31. Click Student meets eligibility on Form 1 for alternative assessments drop-down and select Yes or No.



**Note:** The Alternate Assessment Eligibility Criteria Form is available as a print-only document in Ad Hoc Documents.

This section displays the appropriate screen based on the student's grade level.

**ELEMENTARY AND PRESCHOOL STUDENTS**

1. Click the **Add** button. A new row displays.



Figure 3-177 IEP Screen Testing Tab District Tests

2. Click the **Subject** drop-down and select.

3. Click the **On Grade Level** drop-down and select **Yes** or **No**.
4. If needed, check  on the line of the **Test** record to remove. The row is removed.

**SECONDARY STUDENTS**

5. Check the appropriate testing statement. A textbox is available for more information to be added.

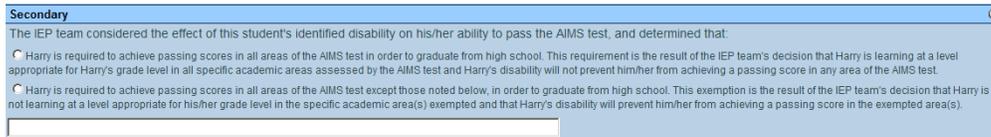


Figure 3-178 IEP Screen Testing Tab Secondary Testing Statement

**LRE TAB**

(Least Restrictive Environment)

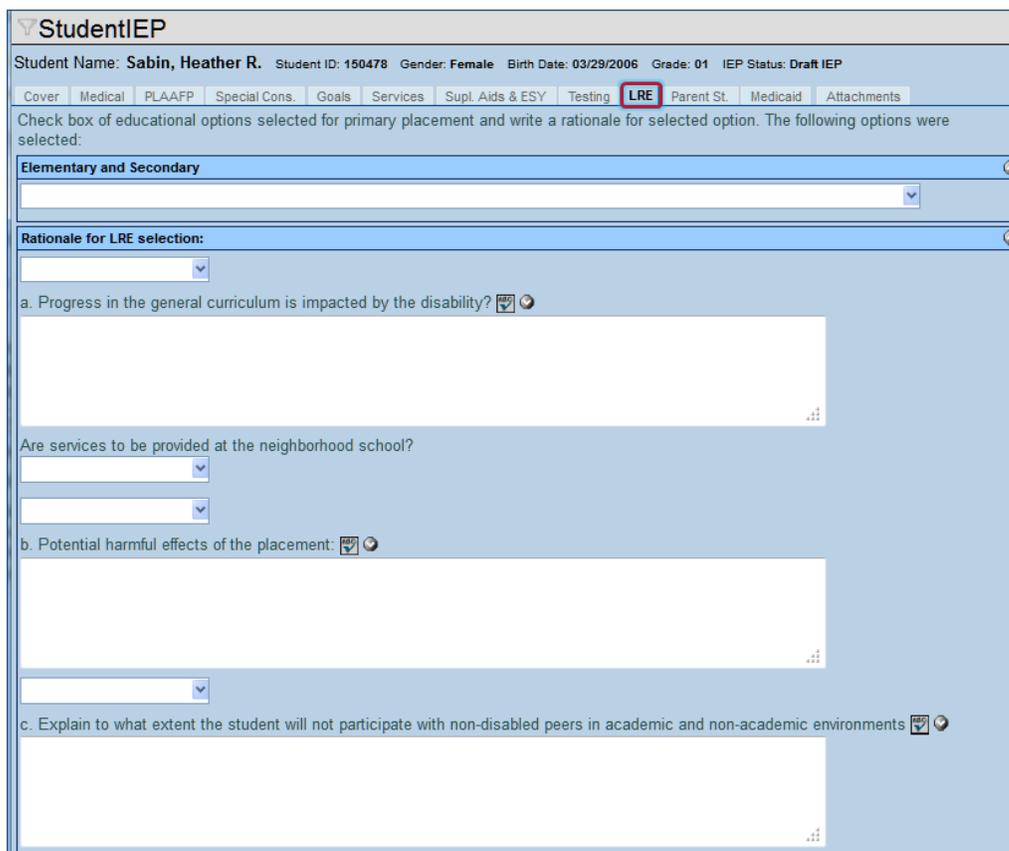


Figure 3-179 IEP Screen LRE Tab

**PRESCHOOL STUDENTS**

If the student is in grade Preschool, the Least Restrictive Environment can be selected for both preschool services and elementary services.

1. Select the appropriate LRE statement from the **Pre School** drop-down list.

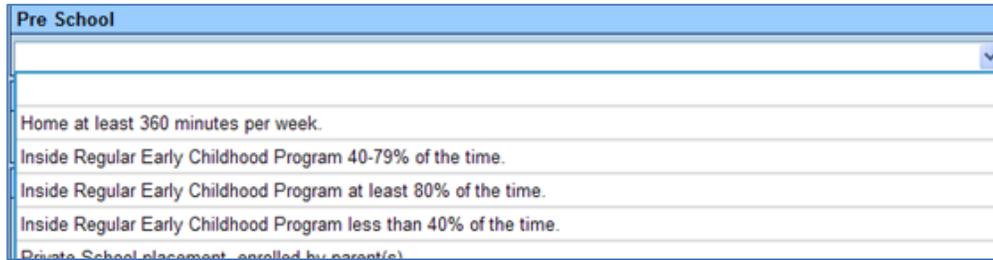


Figure 3-181 IEP Screen LRE Tab Pre School Statement Pre School Drop-down

2. Select the appropriate LRE statement from the **Elementary and Secondary** drop-down

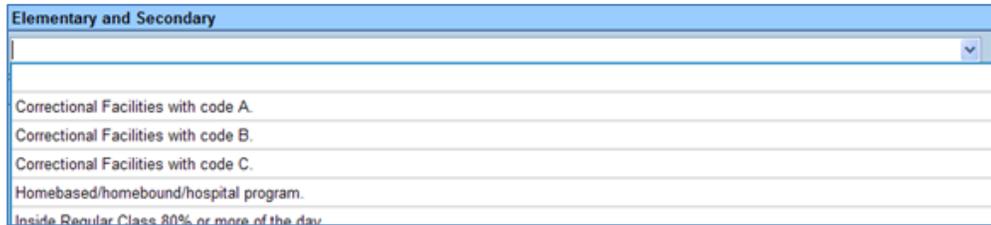


Figure 3-180 IEP Screen LRE Tab Elementary and Secondary Statement Drop-down

list.

### ELEMENTARY AND SECONDARY STUDENTS

3. Select the appropriate LRE statement from the **Elementary and Secondary** drop-down list.

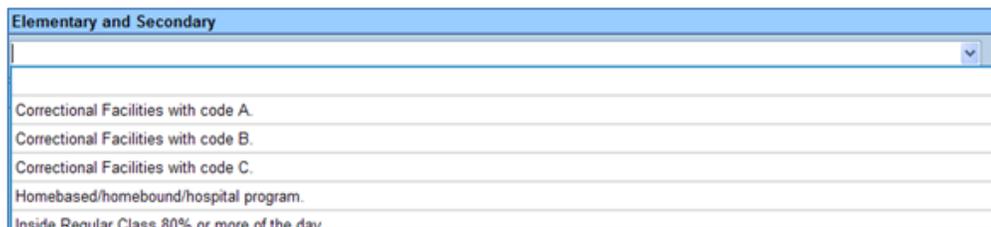


Figure 3-182 IEP Screen LRE Tab Pre School Statement Elementary and Secondary Drop-down

4. Select the appropriate statement from the drop-down list under **Rationale for LRE selection**:. This will populate the textbox below which can be edited.

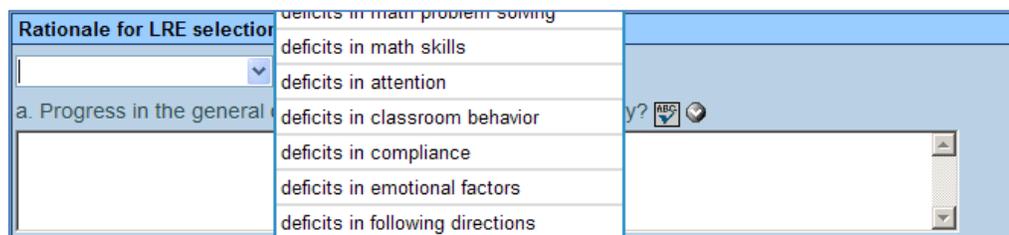


Figure 3-183 IEP Screen LRE Tab A.

5. Select if the services will be provided at the student home school or not using the drop-down statement box. If **No** is selected, an additional box displays asking for an explanation of why.
6. Select the appropriate effect from the drop-down list. This will populate the textbox below which can be edited.

b. Potential harmful effects of the placement:  

Figure 3-184 IEP Screen LRE Tab B.

7. Select the extent the student will not participate from the drop-down list. This will populate the textbox below which can be edited.

c. Explain to what extent the student will not participate with non-disabled peers in academic and non-academic environments  

Figure 3-185 IEP Screen LRE Tab C.

8. Click .

### PARENT ST. TAB

(Parent Statement - Optional for Annual Review and Reeval IEP's)

**StudentIEP**  
 Student Name: **Sabin, Heather R.** Student ID: 150478 Gender: Female Birth Date: 03/29/2006 Grade: 01 IEP Status: Draft IEP

Cover Medical PLAAFP Special Cons. Goals Services Supl. Aids & ESY Testing LRE **Parent St.** Medicaid Attachments

We understand that placement will be reviewed annually and more frequently, if necessary. We also understand we will be contacted if any placement changes are contemplated. Placement does not guarantee success; however, mutual cooperation will result in a greater degree of success in this program. We acknowledge that we have been notified and have received a copy of our due process rights pertaining to Special Education placement and have a basic understanding of these rights. We acknowledge that we have received a copy of the completed IEP form.

Figure 3-186 IEP Screen Parent St. Tab

9. Select the appropriate statement from the Parent Statement drop-down list.
10. Click .



**Note:** By default the Parent Statement tab is available for the Initial and Preschool IEP's. Individual districts have the option to make this tab available for the Annual Review and Reevaluation IEP's. Check with your System Administrator for more information.

**MEDICAID TAB**

The Medical section provides a list of items pertaining to services provided by Health Assistants.

Figure 3-187 IEP Screen Medicaid Tab

1. Check the appropriate boxes and enter any pertinent information in the textboxes provided. Use to spellcheck. Use for more space.
2. Click .

If any Personal Care/ADL Services have been added to the student's Services Tab they will reflect in this section.

X	Line	Specially Designed Instruction/Related Services	Primary	Location	Amount of Time		Date of Initiation On/About	Duration of Service	Medicaid Hours Per Year
					Hours	Frequency Unit			
<input checked="" type="checkbox"/>	1	Aide Svcs - Personal Care/ADL	<input type="checkbox"/>	Classroom/Camp	3.00	per day			540.00

Figure 3-190 IEP Screen Medical Tab Personal ADL Services

Duration/Frequency of Health Aide Assistance - Personal Care/ADL

Figure 3-189 IEP Screen Medical Tab Personal ADL Services Populated.

### ATTACHMENTS TAB

The Attachments tab allows for the attachment of documents to the MET Report (such as Compuscore printouts of testing, supporting documentation from service providers, etc.) Documents included here will print at the back of the MET Report as a single document, but will not have continuous page numbers or headings.



Figure 3-191 IEP Screen Attachments Tab

1. Click the **Add** button to add an attachment. A new window opens.
2. Click the **Browse** button and select the file you wish to upload.

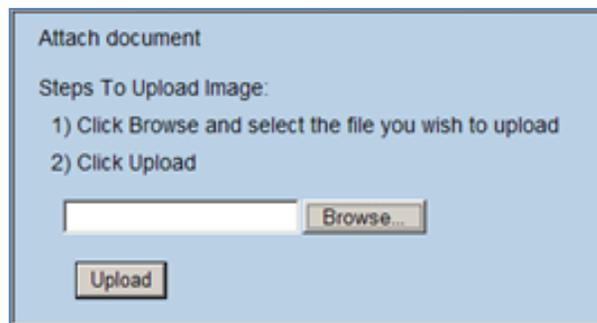


Figure 3-192 Attach Document Screen

3. Click **Upload**.

The name of the document displays in the Comment column. The type of document, Word or PDF, displays in the Document column.



Figure 3-193 IEP Screen Attachments Tab Attachments List

4. The **Print Order** is the order the document will be printed following the IEP. This may be changed by typing in a different order.



**Note:** Attachments must be in Word or PDF format.

## FINALIZE THE IEP



**Caution:** To guard against documents moving to Historical Docs before their time, only the student’s Case Carrier should Finalize the IEP, unless the school district has designated another user to be in charge of finalizing.

When the IEP is finalized, all existing documents, including a copy of the IEP, will be sent to Historical Docs. The student will be moved to the next appropriate process. The next process is usually the Annual Review, unless the student’s next Triennial Reevaluation date is due in less than 6 months, in which case they would be moved to the Reeval process.

1. Click the **Finalize** button in the Action Bar of the document.



Figure 3-194 IEP Finalize Button

If the Validation process has not yet been completed, it will be forced to run now. Once the document has been successfully validated, the Finalize process will begin.

If any active documents for this student HAVE NOT been finalized the Process Move Errors window displays.

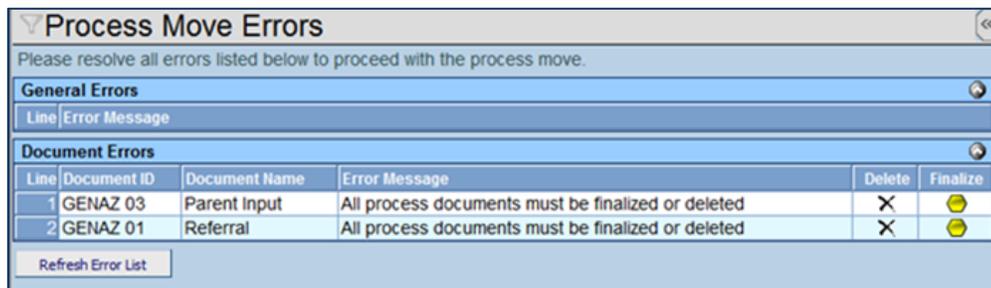


Figure 3-195 IEP Process Move Errors List

Active documents must be either finalized or deleted before advancing through the finalizing process.

2. To finalize, click the **yellow icon** associated with the document. The document will open allowing it to be finalized.
3. To delete, click on the “**X**” in the Delete column. The document will be deleted. The Delete option is a district security option and some users may not have access to the delete option.
4. Once all documents have been deleted or finalized, click .

When the list displays no more **Document Errors** the window can be closed.

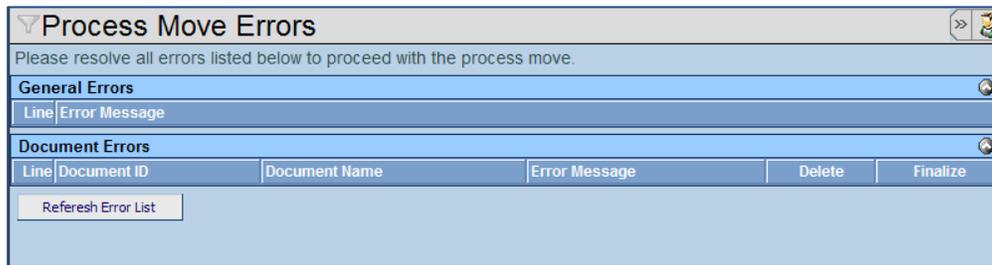


Figure 3-196 IEP Process Move Errors List Cleared

5. Click **Finalize** again from the action bar in the IEP.

Prior to the completion of the Finalize process a window prompt displays confirming the Finalization of the IEP.

6. Type **Yes** in the textbox provided.

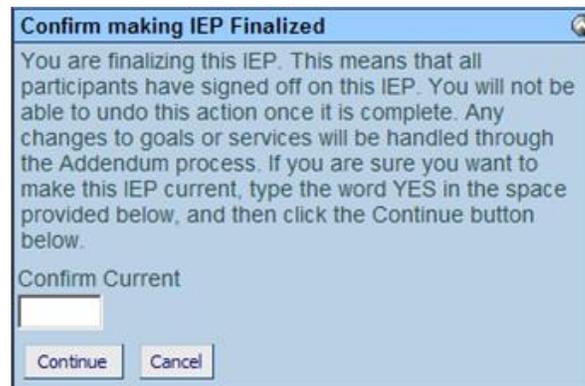


Figure 3-197 IEP Confirm IEP Finalize Message

7. Click **Continue**. A printable version of the IEP will display.
8. Close or print the finalized IEP.

The following events will have occurred:

The student will have been moved to the next appropriate process, most likely the Annual Review process.

The finalized documents are available in Historical Docs with a working copy of the IEP available (yellow icon).

The Progress Report has been created containing the student's goals from the finalized IEP.

The Reevaluation Date and Annual Review Date have been updated and appear in the date columns.

## IEP AMENDMENT

1. Open the Working Copy of the IEP by clicking on the yellow hexagon in the IEP column of the Portfolio screen.

Portfolio

Good evening, Admin User

Portfolio Name

Initial Evaluation

Annual Review

Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs	IEP	Prg	Process Docs		A-R Date	R-E Date
								IEP	Doc		
1	<a href="#">Ackerman, Brian M.</a>	09	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">View</a>	IEP	PRG	▲	●	01/17/2013	04/28/2014
2	<a href="#">Babb, Mark M.</a>	08	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">View</a>	IEP	PRG	▲	▲	05/09/2012	11/14/2013
3	<a href="#">Facio, Wayne E.</a>	05	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">View</a>	IEP	PRG	▲	▲	02/14/2012	04/10/2013

Figure 3-198 Portfolio Screen IEP Icon

OR

Using the SE Student screen go to the Process Docs tab and select the Working Copy of the IEP by clicking on the **green circle** in the Doc column.

Current Process: Annual Review

Process Documents

Line	Name	Status	Doc
1	GENAZ 09 - IEP Meeting Request	In Progress	●
2	GENAZ 13 - Notice of Placement	In Progress	●
3	GENAZ 14 - Notice of IEP	Skipped	▲
4	IEP	In Progress	●

Manual Process Move

Move To:  Move To:

Figure 3-199 SE Student Screen Process Documents Tab IEP Icon

**Confirm Make Amendment**

You are creating an Amended IEP. This means that this IEP will become a copy of the current Finalized IEP. Any changes you have made to the draft IEP before clicking the Make Amendment button will be lost. If you are sure you want to create an Amendment, type the word YES in the space provided below, and then click the Continue button below.

Confirm Make Amendment

Figure 3-200 IEP Amendment Confirmation Screen

The Working Copy will open and be available for amending.

2. Click the Make Amendment button.

**Caution:** Clicking the Make Amendment button prior to making any changes to the IEP will overwrite data written prior to selecting the Make Amendment process. Changes made before the Amendment process has begun will not be saved.

3. A message window displays asking to Confirm Make Amendment. Type **Yes** in the Confirm Make Amendment field
4. Click **Continue**. The Working Copy of the IEP displays.
5. Make the necessary changes and click **Finalize**.

The new IEP will have the heading of Amended IEP and display the Amendment Date along with the unchanged IEP and Reeval dates.

Edupoint School District Special Education Department 1955 S Val Vista Mesa, AZ 85204 Phone: 480-833-2900 Fax: 480-833-2901			<b>Individualized Education Program                  AMENDMENT</b>			
Student Name:		Labianca, Douglas S.		Home Phone:	480-555-1234	
Date Of Birth:		05/27/1995		Home Address:	3453 E Decatur St	
Student No.:		888763		Tempe, AZ 85662		
Age	Gender	Grade	Home School		Attending School	
17	Male	11			Hope High School	
Ethnicity		Primary Language - Date Determined			Home Language - Date Determined	
White					English	
<b>Parent/Guardian</b>						
Name		Home Phone	Name		Home Phone	
Steve Labianca		480-555-1234	Amanda Labianca		480-555-1234	
Address		Work Phone	Address		Work Phone	
3453 E Decatur St		480-555-1234	3453 E Decatur St		480-555-1234	
Tempe, AZ 85662		Emergency Phone	Tempe, AZ 85662		Emergency Phone	
					480-555-1234	
IEP Review Due Date :		04/16/2012	Re-evaluation Due Date:	04/18/2014	Original IEP Date: 04/18/2011	
Interpreter Needed:		<input checked="" type="checkbox"/> Y	<input type="checkbox"/> N			

Figure 3-201 IEP Amendment Example

## PROGRESS REPORT

The Progress Report is available whenever an IEP containing annual goals has been finalized and moved to Historical Documents. The goals that are specified in that finalized IEP are made available in the Progress Report.

1. Click on the **Progress Report** icon in the student's row of the Portfolio View.



Figure 3-202 Portfolio Screen Progress Report Icon

OR

Click on the **Progress Report** button in the Student Screen Process Docs Tab. The Progress Report screen will open.

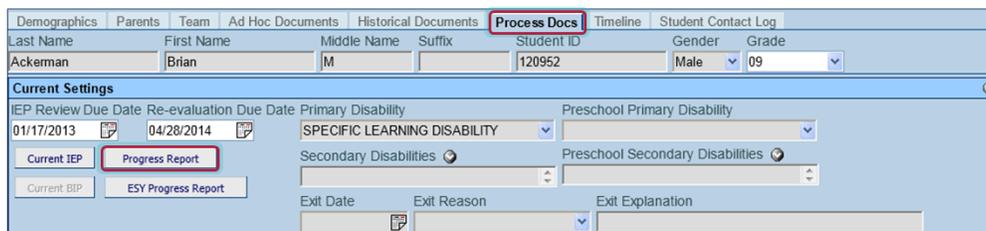


Figure 3-203 SE Student Process Docs Tab Progress Report Button



**Note:** Print Progress Report also means Save! Each time you click on the Print Progress Report button, the most recent version of the Progress Report displays in Historical Documents.

The Progress Report screen initially opens with no Progress Periods created. They are added as needed.

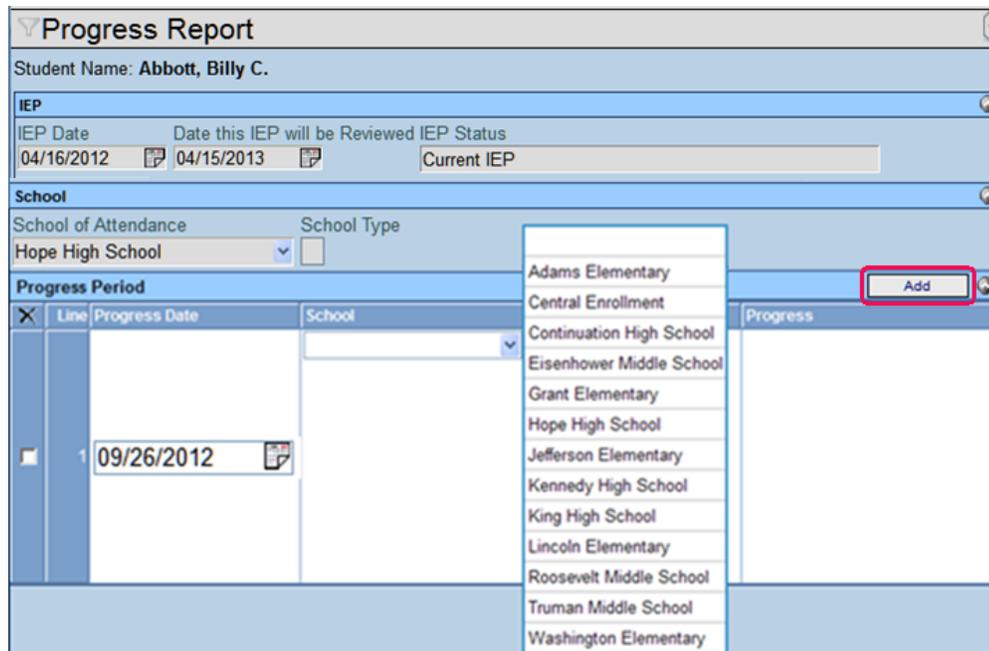


Figure 3-204 IEP Progress Report

2. Click the **Add** button.
3. The **Progress Date** will display today's date by default. To change, enter a new date (MMDDYY) or click  and select date.
4. Select the student's school from the **School** drop-down list.
5. Click . The Progress Link will now be available.
6. Click the [Progress](#) link to open the IEP Progress Period Detail screen.

Progress Period				Add
Line	Progress Date	School	Progress	
1	07/15/2010	Washington Elementary	<a href="#">Progress</a>	

Figure 3-205 IEP Progress Report Progress Link

7. From this screen, the **Progress, Score** and **Comments** can be added to each goal.

IEP Progress Period Detail							
Progress Date: 07/15/2010 Organization Name: Washington Elementary Progress Date: 07/15/2010							
Progress Period Detail							
Line	Category	Goal Description	Pre score date	Pre score	Current Period (7/15/2010)		
					Progress	Score	Comment
1	Language - Integrated Language	Shawn will demonstrate improved social language by maintaining interaction/topic at grade level, given group/classroom activities with necessary levels of support, scoring 12 out of 15 on a district Integrated Language Rubric, measured quarterly. (AZ Academic Standard, LS E1-4)	02/02/2009	7/15	<input type="text" value=""/>		<input type="text"/>
2	Language - Integrated Language	Shawn will demonstrate improved social language by responding to verbal communication at grade level, given group/classroom activities with necessary levels of support, scoring 12 out of 15 on a district Integrated Language Rubric, measured quarterly. (AZ Academic Standard, LS E1-4)	02/02/2009	8/15	<input type="text" value=""/>		<input type="text"/>
3	Speech - Articulation	Shawn will demonstrate improved intelligibility of speech by producing understandable utterances containing no more than 10% unintelligible words when speaking with an untrained listener on 10 designated occasions as measured by quarterly teacher created assessment. AZ Academic Standards LS E 1.2.3.4.	02/02/2009	30% unintelligible	<input type="text" value=""/>		<input type="text"/>
4	Alternate Academic Stds - Reading	Shawn will demonstrate improved comprehension skills by locating specific information using the title and page numbers found in expository text when given picture/print cues scoring 80% as measured quarterly as measured by teacher-made evaluation. R.06 S3 C1 PO5 Alt 2	02/02/2009	45%	<input type="text" value=""/>		<input type="text"/>
5	Alternate Academic Stds - Reading	Shawn will demonstrate improved comprehension skills by answering questions using basic textual and/or graphical features (e.g., headings, bold print) when given a variety of sources (e.g., charts, maps, schedules) scoring 80% as measured quarterly on teacher-made assessment R.06 S1	02/02/2009	50%	<input type="text" value=""/>		<input type="text"/>

Figure 3-206 IEP Progress Period Detail Screen

8. Select the progress for each goal by clicking the **Progress** drop-down and selecting from the list of choices.

1-Your child did not work on this goal during the reporting period (see explanation below).	Progress
2-Progress is not sufficient to meet this goal by the time the IEP is reviewed. An IEP review will be held immediately.	
3-Progress has been made towards the goal, but the goal may not be met. Instructional strategies may need to be changed.	
4-Progress has been made towards the goal. It appears that the goal will be met by the next IEP review.	
5-Performance is at or above what is required to meet the goal by the next review.	

Figure 3-207 IEP Progress Period Detail Screen Drop-down

9. Enter the current score in the **Score** column.
10. Add optional **Comments** for each goal.

Line	Category	Goal Description	Pre score date	Pre score	Current Period (7/15/2010)		
					Progress	Score	Comment
1	Language - Integrated Language	Shawn will demonstrate improved social language by maintaining interaction/topic at grade level, given group/classroom activities with necessary levels of support, scoring 12 out of 15 on a district Integrated Language Rubric, measured quarterly. (AZ Academic Standard, LS E1-4)	02/02/2009	7/15	4	8 / 15	Shawn is making excellent progress on

Figure 3-208 IEP Progress Period Detail Screen Comments

11. After updating all goals, Click .

12. Close the Progress Period Detail screen.
13. To print the progress report, click the **Print Progress Report** button in the Progress Report window.

**ADDITIONAL PROGRESS PERIOD**

1. To add an additional grading period to the Progress Report, click the **Add** button from the main Progress Report window.
2. In the new row that appears, add a **Progress Date** and select the student’s school.
3. Click **Save**. A new Progress Period will be available.

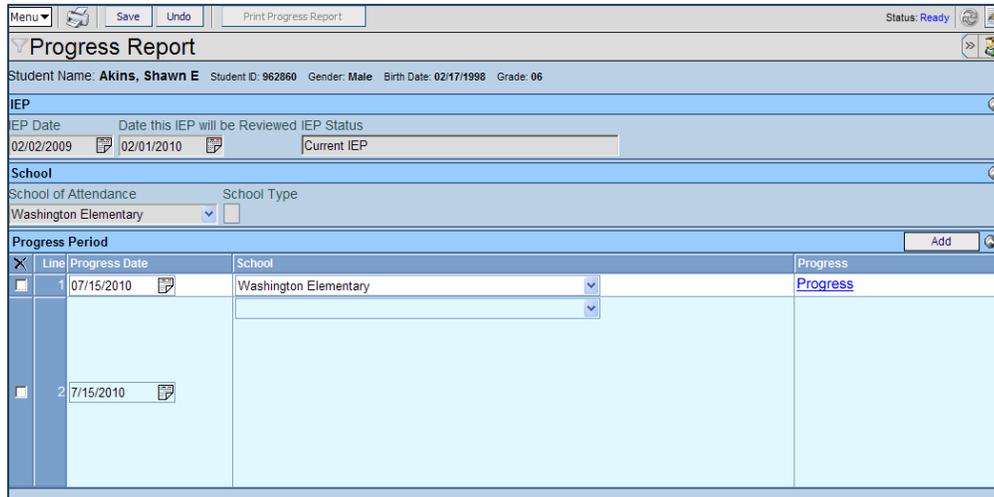


Figure 3-209 IEP Progress Report Screen Create New Period

4. Click the [Progress](#) link in the appropriate row to open the new Progress Report. The new Progress Report displays, along with the scores for the previous period.



Figure 3-210 IEP Progress Report Screen Progress Link

5. Update the new progress period data and click **Save**.
6. Close the **Progress Report** screen.

When the new updated Progress Report is printed the document will show the scores and comments for all available grading periods. This Progress Report sample shows two grading periods complete.

Category: SLI - Fluency			
Annual Goal: Shawn will demonstrate increased fluency by spontaneously utilizing appropriate repair strategies in which the stuttered production is changed to more fluent production when given taped samples of his speech with no model from the teacher with a score of 90% accuracy as measured by quarterly speech sampling. AZ Academic Standards LS-F1,2,3.			
Pre score date: 01/12/2009		Pre score: 75%	
Date	Progress Code	Score	Comments
07/15/2010	1	85%	Shawn is making excellent progress on this goal.
09/15/2010	1	91%	Great work!
Annual Goal: Shawn will demonstrate increased fluency by producing speech which exhibits easy onset at the phrase/sentence level when given pictures with a score of 80% accuracy as measured by quarterly criterion referenced assessment. AZ Academic Standards LS-F1,2,3.			
Pre score date: 01/12/2009		Pre score: 10%	
Date	Progress Code	Score	Comments
07/15/2010	1	50%	
09/15/2010	1	80%	

Figure 3-211 IEP Progress Report Example

## ESY PROGRESS REPORT

The ESY Progress Report is available whenever an IEP containing annual goals checked with **Applies To ESY** has been finalized and moved to Historical Documents. The goals that are specified in that finalized IEP are made available in the ESY Progress Report.

1. To access the ESY Progress Report Click on the **ESY Progress Report** button in the SE Student Screen Process Docs Tab. The ESY Progress Report screen opens.

The screenshot shows the 'Process Docs' tab in the SE Student Screen. The 'Current Settings' section includes fields for IEP Review Due Date (01/17/2013), Re-evaluation Due Date (04/28/2014), Primary Disability (SPECIFIC LEARNING DISABILITY), and Preschool Primary Disability. There are buttons for 'Current IEP', 'Progress Report', 'Current BIP', and 'ESY Progress Report'. The 'ESY Progress Report' button is highlighted with a red box.

Figure 3-212 SE Student Screen Process Docs ESY Progress Report Button

The Progress Report initially opens with no Progress Periods created. Add a new grading period or grading quarter as needed.

2. Click the **Add** button
3. The **Period Date** will display today's date by default. To change the Period Date, enter a new date (MMDDYY) or click and select date.
4. Select the student's school from the **School** drop-down list.

The screenshot shows the 'Progress Period' table with columns for Line, Period Date, and School. A dropdown menu is open for the School column, listing various schools including Adams Elementary, Arizona National High School, Bev High School, Central Enrollment, Continuation High School, Eisenhower Middle School, Grant Elementary, Hope High School, Jefferson Elementary, and Kennedy High School. An 'Add' button is visible in the top right corner of the table area.

Figure 3-213 ESY Progress Report Screen Progress Period Select School

5. Click **Save**. The Progress link will now be available.
6. Click the **Progress** link to open the ESY Progress Detail view.

From this window, student progress, score and comments can be added to each goal.

7. Select the progress for each goal by clicking the **Progress** drop-down and selecting from the list of choices.
8. Enter the current score in the **Score** column.
9. Add optional **Comments** for each goal.
10. After updating all goals, click **Save**.
11. Close the ESY Progress Period Detail screen.
12. To print the progress report, click the **Print Progress Report** button in the ESY Progress Report window.



**Note:** Print Progress Report also means Save! Each time you click on the Print Progress Report button, the most recent version of the Progress Report displays in Historical Documents.

**ADDITIONAL ESY PROGRESS PERIOD**

13. To add an additional grading period to the ESY Progress Report, click the **Add** button from the main ESY Progress Report screen.
14. In the new row that appears, add a **Progress Date** (MMDDYY) or click  and select date.
15. Select the student's **School**.
16. Click . A new Progress Period will be available.
17. Click the [Progress](#) link in the appropriate row to open the new Progress Report. The new Progress Report displays, along with the scores for the previous period.

Progress Period				<input type="button" value="Add"/>
Line	Period Date	School	Progress	
1	07/06/2012 	Adams Elementary	<a href="#">Progress</a>	
2	07/26/2012 	Adams Elementary	<a href="#">Progress</a>	

Figure 3-214 ESY Progress Report Screen Progress Period Grid

18. Update the new progress period data and click .
19. Close the ESY Progress Report window.

When the new updated ESY Progress Report is printed the document will show the scores and comments for all available grading periods.

This ESY Progress Report sample shows two grading periods complete.

Category: SLI - Fluency			
Annual Goal: Shawn will demonstrate increased fluency by spontaneously utilizing appropriate repair strategies in which the stuttered production is changed to more fluent production when given taped samples of his speech with no model from the teacher with a score of 90% accuracy as measured by quarterly speech sampling. AZ Academic Standards LS-F1,2,3.			
Pre score date: 01/12/2009		Pre score: 75%	
Date	Progress Code	Score	Comments
07/15/2010	1	85%	Shawn is making excellent progress on this goal.
09/15/2010	1	91%	Great work!
Annual Goal: Shawn will demonstrate increased fluency by producing speech which exhibits easy onset at the phrase/sentence level when given pictures with a score of 80% accuracy as measured by quarterly criterion referenced assessment. AZ Academic Standards LS-F1,2,3.			
Pre score date: 01/12/2009		Pre score: 10%	
Date	Progress Code	Score	Comments
07/15/2010	1	50%	
09/15/2010	1	80%	

Figure 3-215 ESY Progress Report Screen Example

## GENAZ 13 – NOTICE OF PLACEMENT (REVIEW)

The Notice of Placement (Review) is located in the Annual Review Process.



**Note:** The Notice of Placement (Review) has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Placement contains one tab:

- **Prior Written Notice**

**▼ Prior Written Notice**

Student Name: **Akins, Shawn E.** Document: GENAZ 13 Description: Notice of Placement

**Prior Written Notice**

Document Name	Document Date
Notice of Placement	<input type="text"/>

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
The evaluation team has received a referral for a possible comprehensive evaluation of your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
 (initials)

This document was prepared by:

Case Manager  Case Manager Phone

Figure 3-216 Notice of Placement Screen

To create a Notice of Placement document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

2. Click on the drop-down box located above the textbox.

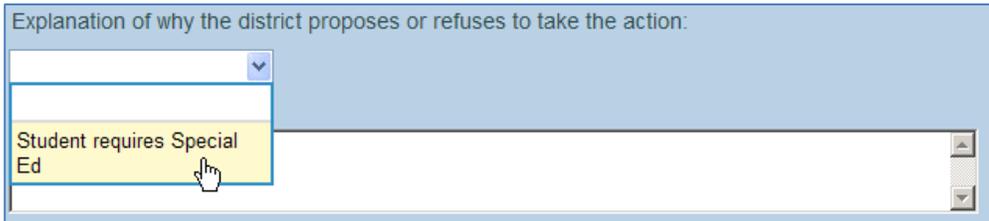


Figure 3-217 Notice of Placement Screen Statements Section Drop-down

3. Select the desired key-word stem in the drop-down list.

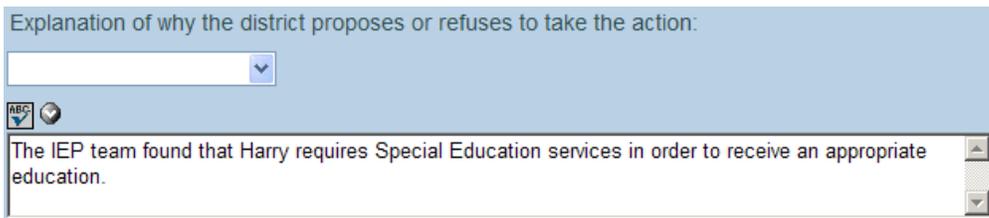


Figure 3-218 Notice of Placement Screen Statements Section Populated

4. The statement associated with the key-word stem selected will appear in the textbox. Use  to spellcheck. Use  for more space.
5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click  next to **This document was prepared by:**. The Find: Staff screen displays.
8. Enter all or part of staff **Last Name, First Name**.

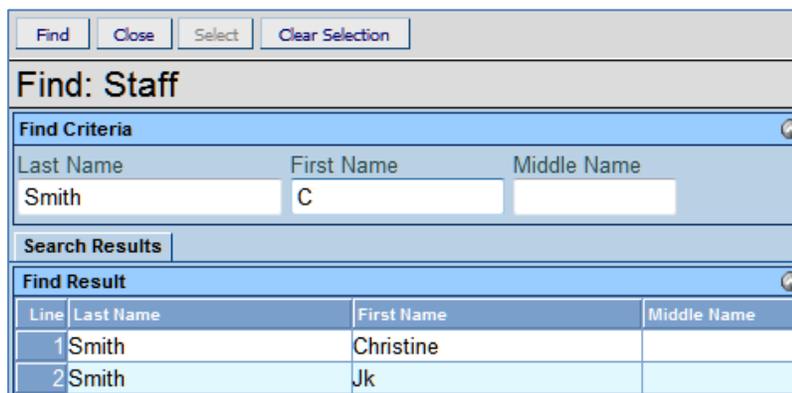


Figure 3-219 Find: Staff Screen

9. Click  or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.
11. Click again or click . Find: Staff screen closes and staff name displays.
12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 14 – NOTICE OF IEP (REVIEW)

The Notice of IEP (Review) is located in the Annual Review Process.



**Note:** The Notice of IEP (Review) has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of IEP contains one tab:

- **Prior Written Notice**

**▼ Prior Written Notice**

Student Name: **Akins, Shawn E.** Document: **GENAZ 14** Description: **Notice of IEP**

**Prior Written Notice**

Document Name  
Notice of IEP

Document Date

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
The evaluation team has received a referral for a possible comprehensive evaluation of your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
 (initials)

This document was prepared by:  
**Admin User**

Case Manager  Case Manager Phone

Figure 3-220 Notice of IEP Screen

To create a Notice of IEP document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

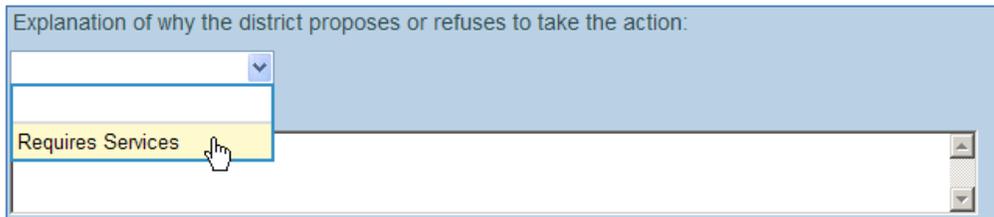


Figure 3-221 Notice of IEP Screen Statements Section Drop-down

2. Click on the drop-down box located above the textbox.
3. Select the desired key-word stem in the drop-down list.

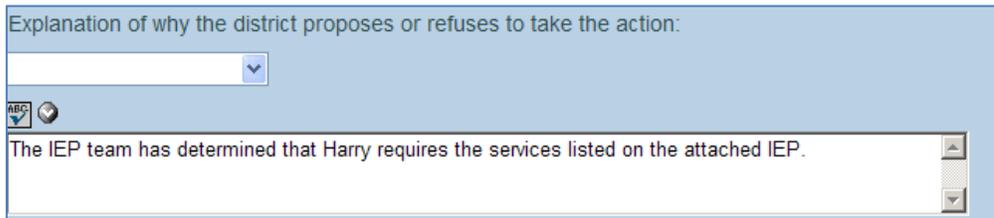


Figure 3-222 Notice of IEP Screen Statements Section Populated

4. The statement associated with the key-word stem selected will appear in the textbox. Use  to spellcheck. Use  for more space.



**Tip:** When entering, editing or viewing information in a textbox, grab  in the bottom right corner, to resize the box. The box can be adjusted larger to view more of the information or smaller to provide more room on the screen.

5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click  next to **This document was prepared by:**. The Find: Staff screen displays.

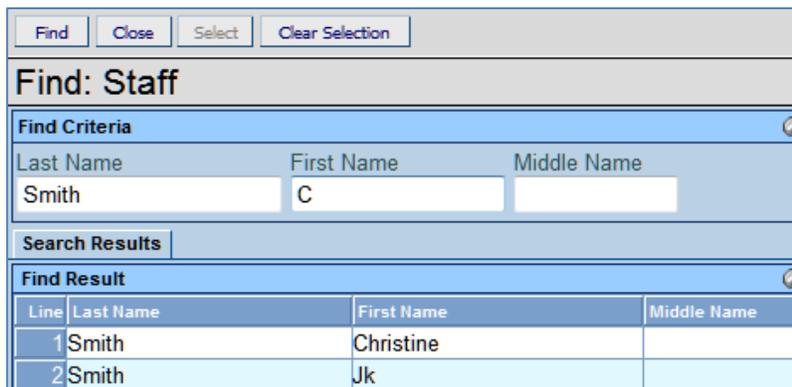


Figure 3-223 Find: Staff Screen

8. Enter all or part of staff **Last Name, First Name**.
9. Click  or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.
11. Click again or click . Find: Staff screen closes and staff name displays.
12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 15 – NOTICE OF REEVALUATION WAIVER

The Notice of Reevaluation Waiver is located in the Reevaluation Process.

A Reevaluation Waiver is conducted when the district and the student's team agree that the Triennial Evaluation will be waived. GENAZ 55 – Reevaluation Agreement in Ad Hoc documents is a companion to this document. Upon the finalization of this document the student will be moved to the Annual Review Process. The Waiver notice and agreement document will move to Historical Docs. The working copy of the IEP will move with the student. Changes made to the IEP will not be lost.

[\(See: Documents With Unique Functionality\)](#)



**Note:** The Notice of Reevaluation Waiver has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Reevaluation Waiver contains one tab:

- **Prior Written Notice**

Figure 3-224 Notice of Reevaluation Waiver Screen

To create a Notice of Reeval Waiver document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

2. Click on the drop-down box located above the textbox.

Figure 3-226 Notice of Reevaluation S/Waiver Screen Statements Section Drop-down

Figure 3-225 Notice of Reevaluation Waiver Screen Statements Section Populated

3. Select the desired key-word stem in the drop-down list.
4. The statement associated with the key-word stem selected will appear in the textbox. Use to spellcheck. Use for more space.
5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click and select date.

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-227 Find: Staff Screen

6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click next to **This document was prepared by:**. The Find: Staff screen displays.
8. Enter all or part of staff **Last Name, First Name**.
9. Click or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.
11. Click again or click . Find: Staff screen closes and staff name displays.
12. Click .

The document can be [printed](#), [validated](#) and [finalized](#). All finalized documents for this student will move to Historical Docs and the student will be moved to Annual Review process for completion of the student's review.

## GENAZ 16 – NOTICE OF REFERRAL (REEVAL)

The Notice of Referral (Reeval) is located in the Reevaluation Process.



**Note:** The Notice of Referral (Reeval) has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Referral contains one tab:

- **Prior Written Notice**

**▼ Prior Written Notice**

Student Name: **Akins, Shawn E.**    Document: **GENAZ 16**    Description: **Notice of Referral**

**Prior Written Notice**

Document Name	Document Date
Notice of Referral	<input type="text"/>

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
The evaluation team has received a referral for a possible comprehensive evaluation of your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.  
Procedural Safeguards provided to parent(s)

(initials)

This document was prepared by:

Case Manager     Case Manager Phone

Figure 3-228 Notice of Referral Reevaluation Screen

To create a Notice of Referral document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

The Statements section contains four description areas, where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

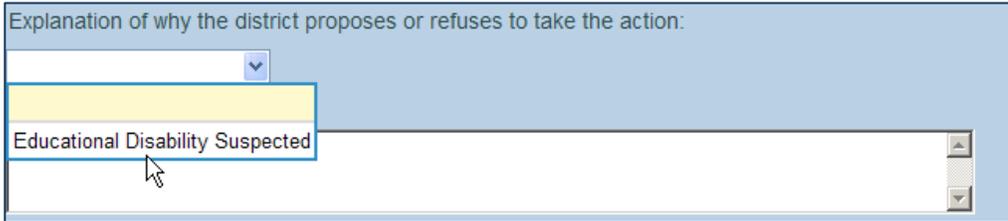


Figure 3-229 Notice of Referral Reevaluation Screen Statements Section Drop-down

2. Click on the drop-down box located above the textbox.

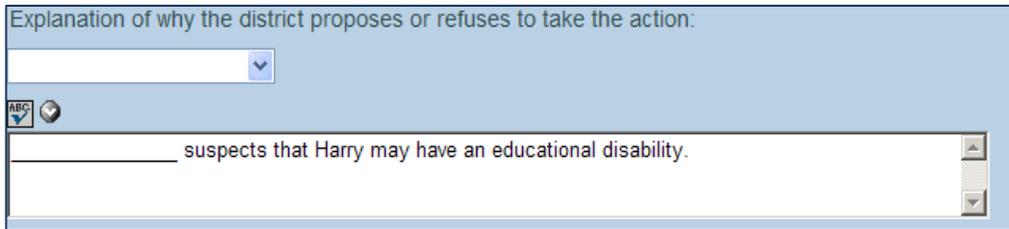


Figure 3-230 Notice of Referral Reevaluation Screen Statements Section Populated

3. Select the desired key-word stem in the drop-down list.
4. The statement associated with the key-word stem selected will appear in the textbox. Use  to spellcheck. Use  for more space.
5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click  next to **This document was prepared by:**. The Find: Staff screen displays.
8. Enter all or part of staff **Last Name, First Name**.
9. Click  or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.

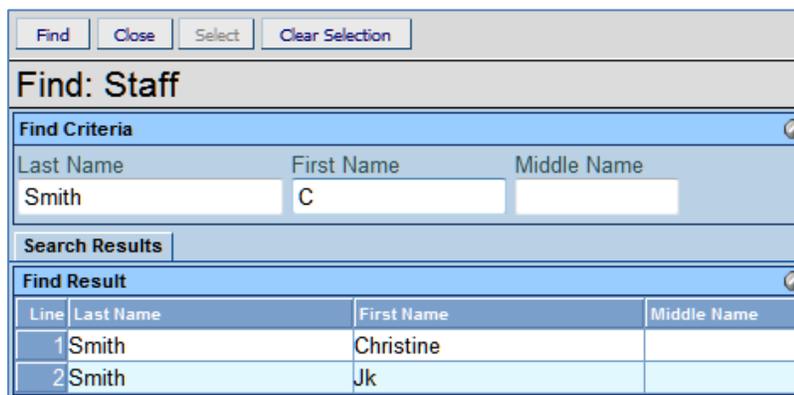


Figure 3-231 Find: Staff Screen

11. Click again or click . Find: Staff screen closes and staff name displays.

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 17 – NOTICE OF REEVALUATION DECISION

The Notice of Reevaluation Decision is located in the Reevaluation Process.



**Note:** The Notice of Reevaluation Decision has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Reevaluation Decision contains one tab:

- **Prior Written Notice**

**Prior Written Notice**

Student Name: **Aaron, Ian** Document: **GENAZ 17** Description: **Notice of Reevaluation Decision**

**Prior Written Notice**

Document Name  
Notice of Reevaluation Decision

Document Date  
 

**Decision**

Current Decision: Eligible for Evaluation Change Decision To "Not Eligible for Evaluation"

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Evaluation  
 The Multidisciplinary Evaluation Team (MET) has decided to collect additional data on your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:  
 

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:  
 

Description of other options considered and why those options were rejected:  
 

Description of the factors relevant to the actions proposed or refused are:  
 

**Implementation of Decision**

This decision is proposed to be implemented on:  

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
  (initials)

This document was prepared by:  
Admin User

Case Manager User, Admin Case Manager Phone 481-123-4578

Figure 3-232 Notice of Reevaluation Decision Screen

To create a Notice of Reevaluation Decision document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. The Notice of Evaluation opens in Evaluate mode. To change the decision click . Current Decision will display **Not Evaluate**.
3. The Current Decision can be changed back to Evaluate by clicking .

Based on the decision made above the document will display the appropriate text in the Statement fields and drop-down selections.

There are four statement areas for the explanations of action taken. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly into the textboxes.

4. Click on the drop-down box located above the textbox.

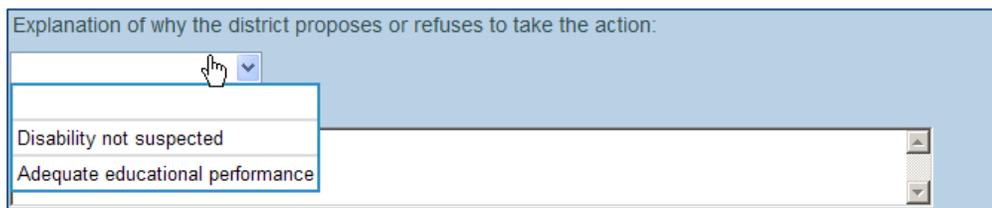


Figure 3-233 Notice of Reevaluation Decision Screen Sentence Stem Drop-down

5. Select the desired key-word stem in the drop-down list.
6. The statement associated with the key-word stem selected will appear in the textbox. The statement can then be edited and spell checked if desired.

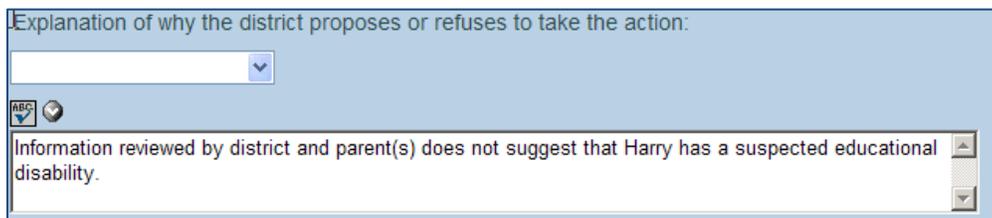


Figure 3-234 Notice of Reevaluation Decision Screen Inserted Statement

7. Enter the **This decision is proposed to be implemented on:** date (MMDDYY) or click  and select date.
8. Enter **(initials)** to signify that the Procedural Safeguards were provided to parent.
9. Click  next to the **This document was prepared by:** to select the staff name. The Find: Staff screen displays.

10. Enter all or part of staff **Last Name, First Name**.

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-235 Find: Staff Screen

11. Click  or press ENTER. Search Results displays a list of matching criteria.
12. Click line of staff name. Line highlights.
13. Click again or click . Find: Staff screen closes and staff name displays.
14. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 18 – NOTICE OF TRIENNIAL

The Notice of Triennial is located in the Reevaluation Process.



**Note:** The Notice of Triennial has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Triennial contains one tab:

- **Prior Written Notice**

**▼ Prior Written Notice**

Student Name: **Akins, Shawn E.** Document: **GENAZ 18** Description: **Notice of Triennial**

**Prior Written Notice**

Document Name	Document Date
Notice of Triennial	<input type="text"/>

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
The evaluation team has received a referral for a possible comprehensive evaluation of your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.  
Procedural Safeguards provided to parent(s)

(initials)

This document was prepared by:

Case Manager  Case Manager Phone

Figure 3-236 Notice of Triennial Screen

To create a Notice of Triennial document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

2. Click on the drop-down box located above the textbox.

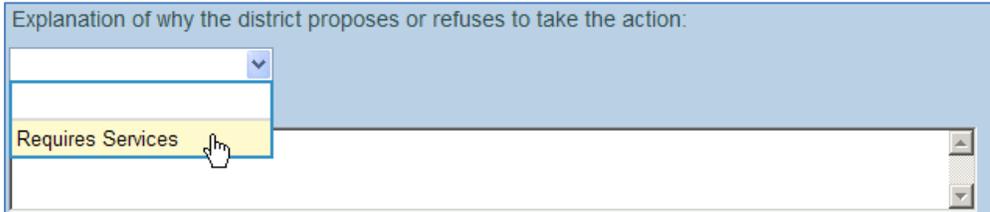


Figure 3-237 Notice of Triennial Screen Statements Section Drop-down

3. Select the desired key-word stem in the drop-down list.

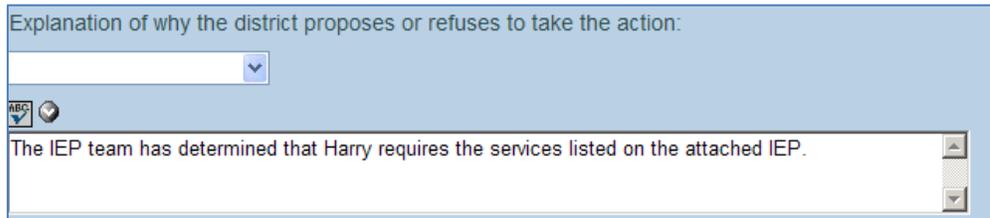


Figure 3-238 Notice of Triennial Screen Statements Section Populated

4. The statement associated with the key-word stem selected will appear in the textbox. Use  to spellcheck. Use  for more space.



**Tip:** When entering, editing or viewing information in a textbox, grab  in the bottom right corner, to resize the box. The box can be adjusted larger to view more of the information or smaller to provide more room on the screen.

5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click  next to **This document was prepared by:**. The Find: Staff screen displays.

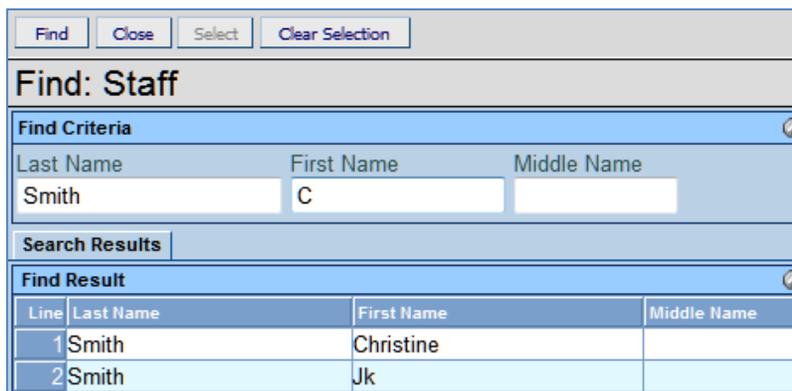


Figure 3-239 Find: Staff Screen

8. Enter all or part of staff **Last Name, First Name**.
9. Click  or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.
11. Click again or click . Find: Staff screen closes and staff name displays.
12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 19 – NOTICE OF TEST INTENT

The Notice of Intent to Test is located in the Reevaluation Process.



**Note:** The Notice of Test Intent has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Test Intent provides the user with two options:

- **Notice of Test Intent** The student will remain in the process. If this option is selected, the Notice of Intent to Test will work as other PWN's and remain in the student's process documents until the IEP is finalized, at which point the document will move to Historical Docs along with the other created and finalized documents.
- **Notice of NO Test Intent** The student will remain in the process. If this option is selected, the Notice of Test Intent will work as other PWN's and remain in the student's process documents until the IEP is finalized or the decides the student is Not Eligible for services, at which point the document will move to Historical Docs along with the other created and finalized documents.

The Notice of Test Intent contains one tab:

- **Prior Written Notice**

**Prior Written Notice**

Student Name: **Aaron, Ian** Document: **GENAZ 19** Description: **Notice of Test Intent**

**Prior Written Notice**

Document Name: **Notice of Test Intent** Document Date:

**Decision**

Current Decision: **Intent to Test** [Change Decision To "Intent Not to Test"](#)

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Evaluation  
The Multidisciplinary Evaluation Team (MET) has decided that standardized testing is necessary as part of Ian's reevaluation.

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
 (initials)

This document was prepared by:  
**Admin User**

Case Manager:  Case Manager Phone:

Figure 3-240 Notice of Test Intent Screen

To create a Notice of Test Intent document

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. The Notice of Test Intent opens in Intent to Test mode. To change the decision click [Change Decision To "Intent Not to Test"](#). Current Decision will display **Intent Not to Test**.
3. The Current Decision can be changed back to Intent to Test by clicking [Change Decision To "Intent to Test"](#).

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

- Click on the drop-down box located above the textbox.

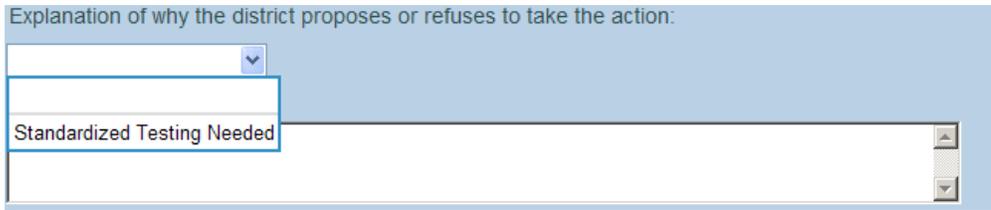


Figure 3-241 Notice of Test Intent Screen Sentence Stem Drop-down

- Select the desired key-word stem in the drop-down list.

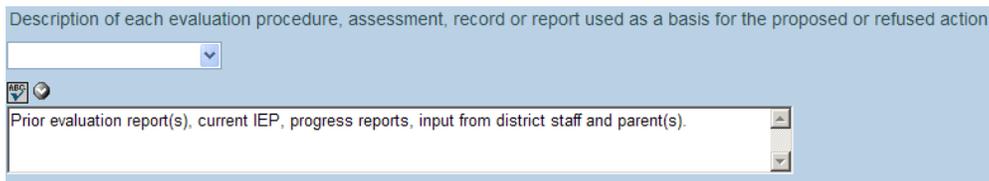


Figure 3-242 Notice of Test Intent Screen Sentence Stem Completed

- The statement associated with the key-word stem selected will appear in the textbox. Use to spellcheck. Use for more space.
- The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click and select date.
- Enter **(initials)** to signify that Procedural Safeguards were provided to parent.
- Click next to **This document was prepared by:**. The Find: Staff screen displays.

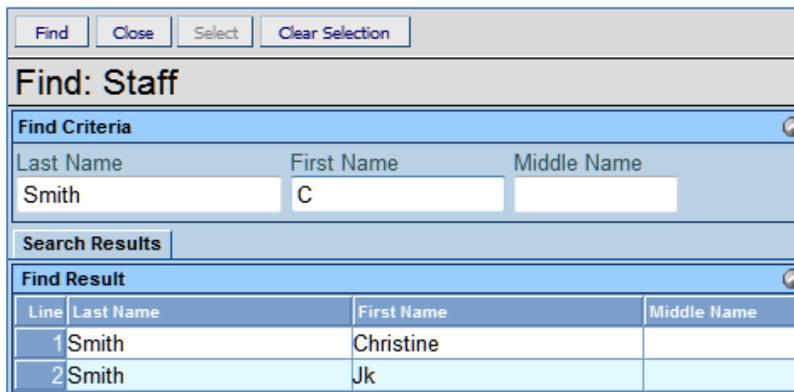


Figure 3-243 Find: Staff Screen

- Enter all or part of staff **Last Name, First Name**.
- Click or press ENTER. Search Results displays a list of matching criteria.
- Click line of staff name. Line highlights.
- Click again or click . Find: Staff screen closes and staff name displays.
- Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 20 – NOTICE OF TERMINATION

The Notice of Termination is located in the Reevaluation Process.

The Notice of Termination provides two options:

- **Terminate the student from PART of special education services.** If this option is selected, the Notice of Termination will work as other PWN's and remain in the student's process documents until the IEP is finalized, at which point the document will move to Historical Docs along with the other created and finalized documents.
- **Terminate the student from ALL special education services.** If this option is selected, upon finalizing the Notice of Termination, the student will be removed from all active special education processes. Any document created and finalized up to and including the Notice of Termination will move to the student's Historical Docs tab.

[\(See: Documents With Unique Functionality\)](#)



**Note:** The Notice of Termination has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Termination contains one tab:

- **Prior Written Notice**

**▼ Prior Written Notice**

Student Name: **Aaron, Ian** Document: **GENAZ 20** Description: **Notice of Termination**

**Prior Written Notice**

Document Name

Document Date

**Decision**

Current Decision:  Change Decision To "Terminate All Services"

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
 The evaluation team has received a referral for a possible comprehensive evaluation of your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
 (initials)

This document was prepared by:

Case Manager  Case Manager Phone

Figure 3-244 Notice of Termination Screen

To create a Notice of Termination document

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. The Notice of Termination opens in Terminate Part Services mode. To change the decision click [Change Decision To "Terminate All Services"](#). Current Decision will display **Terminate All Services**.
3. The Current Decision can be changed back to Terminate Part Services by clicking [Change Decision To "Terminate Part of Services"](#).

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

4. Click on the drop-down box located above the textbox.
5. Select the desired key-word stem in the drop-down list.

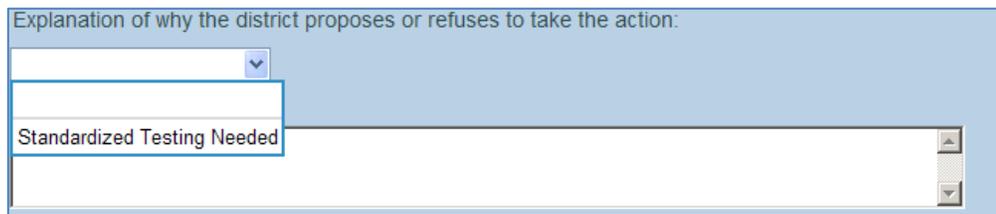
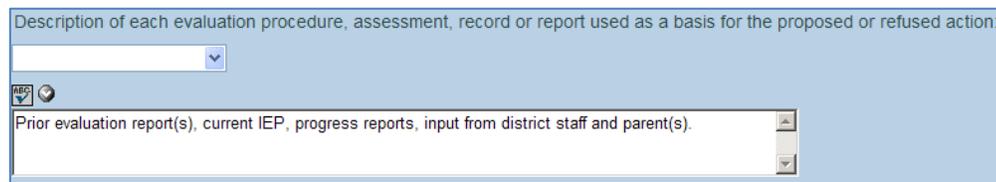


Figure 3-245 Notice of Termination Screen Sentence Stem Drop-down

6. The statement associated with the key-word stem selected will appear in the textbox. Use



 to spellcheck. Use  for more space.

7. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
8. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
9. Click  next to **This document was prepared by:**. The Find: Staff screen displays.

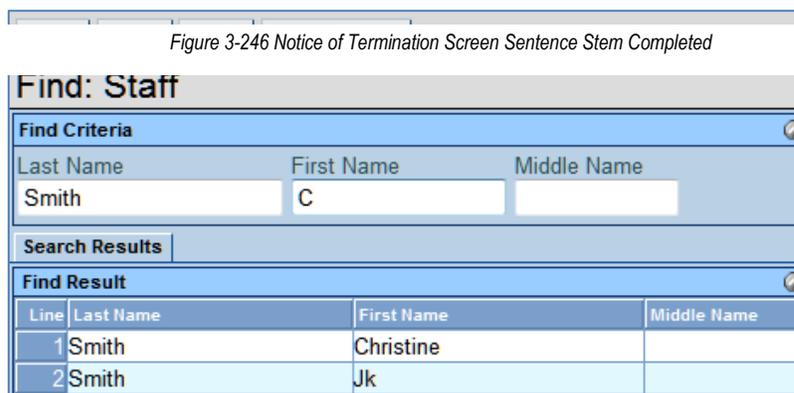


Figure 3-246 Notice of Termination Screen Sentence Stem Completed

Figure 3-247 Find: Staff Screen

10. Enter all or part of staff **Last Name, First Name**.

11. Click  or press ENTER. Search Results displays a list of matching criteria.
12. Click line of staff name. Line highlights.
13. Click again or click . Find: Staff screen closes and staff name displays.
14. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

If Terminating a Student from *Part of Services*, validate and finalize the document.

If Terminating a Student from *ALL Special Education Services*, continue to the next step:

#### TERMINATING A STUDENT FROM ALL SPECIAL EDUCATION SERVICES:

1. Click the **Finalize** button.

If any documents for this student are NOT yet finalized or if the student has a draft IEP, a Process Move Errors window will appear.

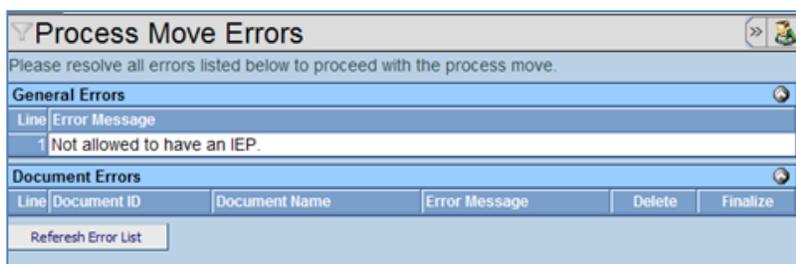


Figure 3-248 Notice of Termination Process Move Error List

2. All documents must be finalized or deleted and the draft IEP must be deleted before proceeding.

Upon fixing any Process Move Errors and finalizing, an Exit Process screen displays.

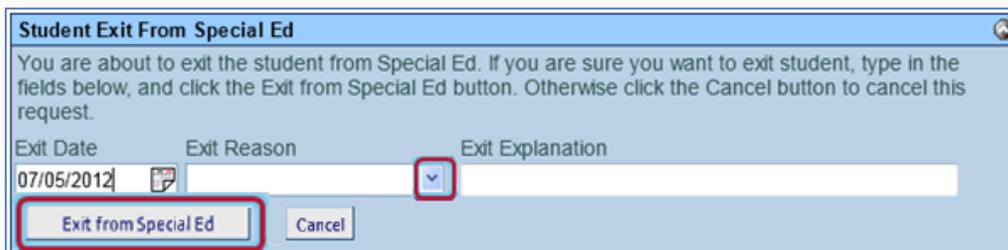


Figure 3-249 Student Exit From Special Ed Screen

3. Using the drop-down menu select the appropriate **Exit Reason** and type in the **Exit Explanation**.
4. Click Exit from Special Ed.

After successfully finalizing the Termination notice, the student will be removed from the user's Portfolio view. All finalized documents will appear in the student's Historical Docs tab. (Click on the student icon to view). If the student is ever referred for special education in the future, they can be manually moved to the Initial or Reevaluation process.)

## GENAZ 21 – NOTICE OF CONTINUED PLACEMENT

The Notice of Continued Placement is located in the Reevaluation Process.



**Note:** The Notice of Continued Placement has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Continued Placement contains one tab:

- **Prior Written Notice**

**▼ Prior Written Notice**

Student Name: **Akins, Shawn E.**    Document: **GENAZ 21**    Description: **Notice of Continued Placement**

Prior Written Notice

Document Name	Document Date
Notice of Continued Placement	<input type="text"/>

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
The evaluation team has received a referral for a possible comprehensive evaluation of your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
 (initials)

This document was prepared by:  
Admin User

Case Manager     Case Manager Phone

Figure 3-250 Notice of Continued Placement Screen

To create a Notice of Continued Placement document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

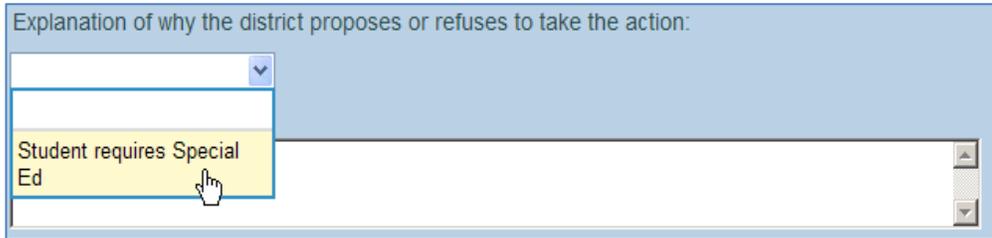


Figure 3-252 Notice of Continued Placement Screen Statements Section Drop-down

2. Click on the drop-down box located above the textbox.
3. Select the desired key-word stem in the drop-down list.
4. The statement associated with the key-word stem selected will appear in the textbox. Use

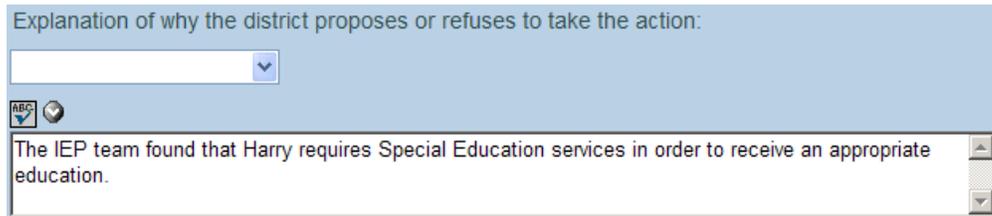


Figure 3-253 Notice of Continued Placement Screen Statements Section Populated

 to spellcheck. Use  for more space.

5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click  next to **This document was prepared by:**. The Find: Staff screen displays.

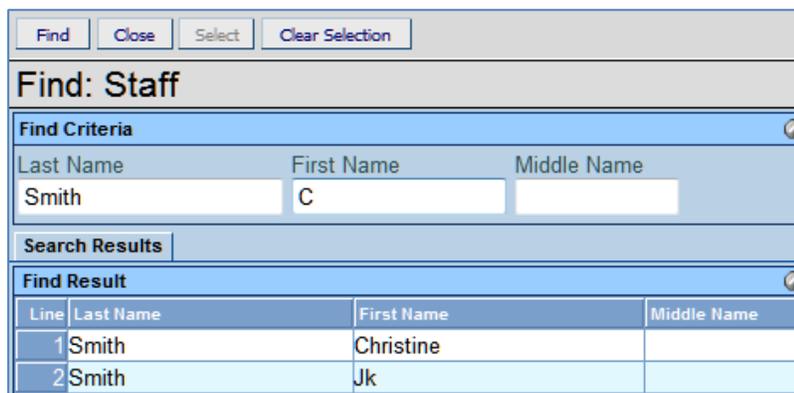


Figure 3-251 Find: Staff Screen

8. Enter all or part of staff **Last Name, First Name**.
9. Click  or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.
11. Click again or click . Find: Staff screen closes and staff name displays.
12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 22 – NOTICE OF IEP (REEVAL)

The Notice of IEP (Reeval) is located in the Reevaluation Process.



**Note:** The Notice of IEP has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of IEP contains one tab:

- **Prior Written Notice**

**▼ Prior Written Notice**

Student Name: **Akins, Shawn E.** Document: **GENAZ 22** Description: **Notice of IEP**

**Prior Written Notice**

Document Name: **Notice of IEP** Document Date:

---

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
The evaluation team has received a referral for a possible comprehensive evaluation of your child.

---

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

---

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
 (initials)

This document was prepared by:  
\* **Admin User**

Case Manager  Case Manager Phone

To create a Notice of IEP document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

2. Click on the drop-down box located above the textbox.

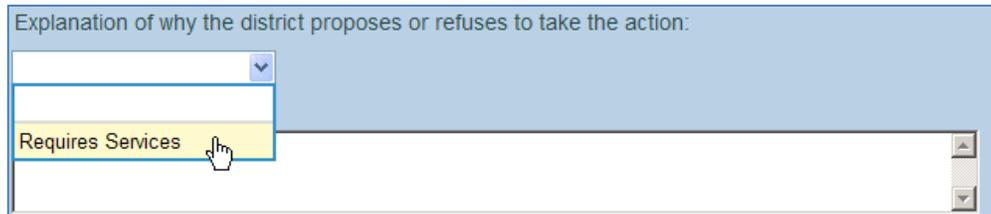


Figure 3-255 Notice of IEP Reevaluation Screen Statements Section Drop-down

3. Select the desired key-word stem in the drop-down list.

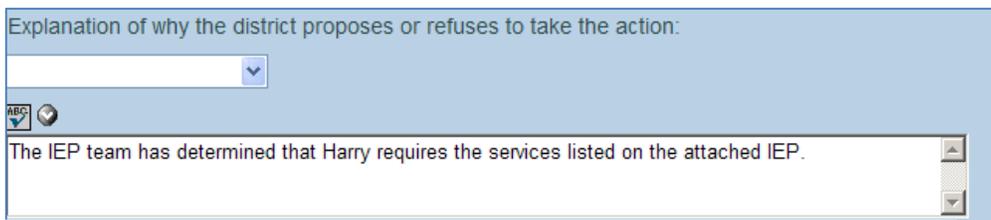


Figure 3-256 Notice of IEP Reevaluation Screen Statements Section Populated

4. The statement associated with the key-word stem selected will appear in the textbox. Use  to spellcheck. Use  for more space.



**Tip:** When entering, editing or viewing information in a textbox, grab  in the bottom right corner, to resize the box. The box can be adjusted larger to view more of the information or smaller to provide more room on the screen.

5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click  next to **This document was prepared by:**. The Find: Staff screen displays.

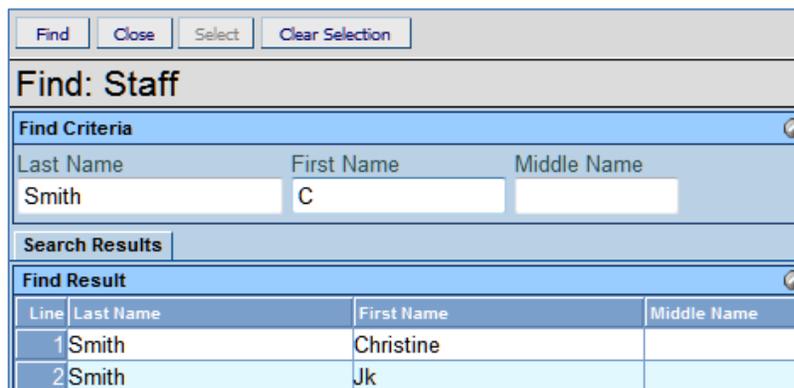


Figure 3-257 Find: Staff Screen

8. Enter all or part of staff **Last Name, First Name**.
9. Click  or press ENTER. Search Results displays a list of matching criteria.

10. Click line of staff name. Line highlights.

11. Click again or click . Find: Staff screen closes and staff name displays.

12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 23 – NOTICE OF TRANSFER

The Notice of Transfer is located in the Transfer Process. The Notice of Transfer in the Transfer Process is intended for special education students who have transferred from another district.



**Note:** The Notice of Transfer has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Transfer contains one tab:

- **Prior Written Notice**

**Prior Written Notice**

Student Name: **Akins, Shawn E.** Document: **GENAZ 23** Description: **Notice of Transfer**

**Prior Written Notice**

Document Name: **Notice of Transfer** Document Date:

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
The evaluation team has received a referral for a possible comprehensive evaluation of your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

Description of other options considered and why those options were rejected:

Description of the factors relevant to the actions proposed or refused are:

**Implementation of Decision**

This decision is proposed to be implemented on:

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
 (initials)

This document was prepared by:  
**Admin User**

Case Manager:  Case Manager Phone:

Figure 3-258 Notice of Transfer Screen

To create a Notice of Transfer document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

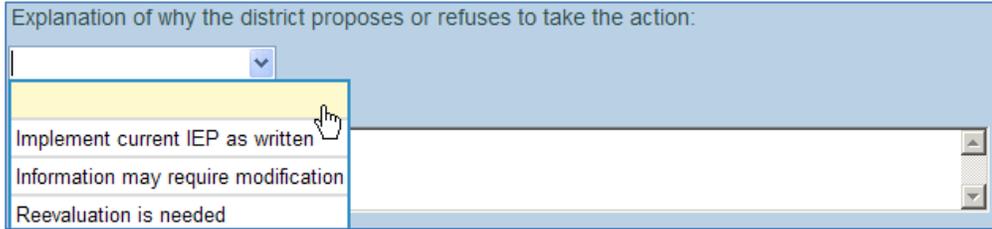


Figure 3-259 Notice of Transfer Screen Statements Section Drop-down

2. Click on the drop-down box located above the textbox.
3. Select the desired key-word stem in the drop-down list.

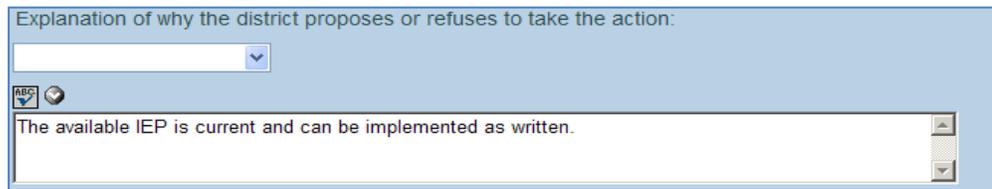


Figure 3-260 Notice of Transfer Screen Statements Section Completed

4. The statement associated with the key-word stem selected will appear in the textbox. Use  to spellcheck. Use  for more space.
5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click  next to **This document was prepared by:**. The Find: Staff screen displays.
8. Enter all or part of staff **Last Name, First Name**.
9. Click  or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.
11. Click again or click . Find: Staff screen closes and staff name displays.

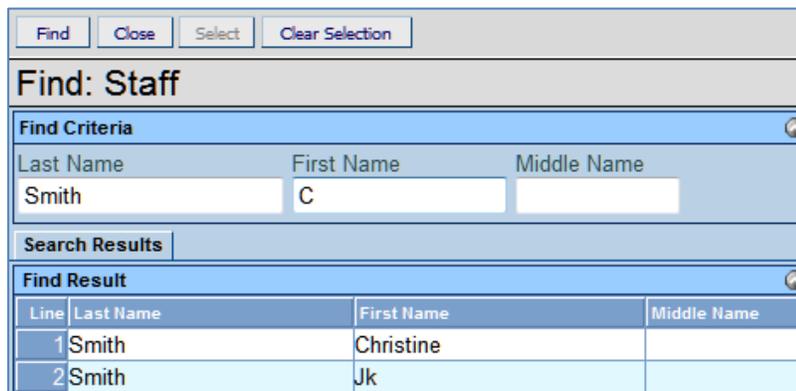


Figure 3-261 Find: Staff Screen

12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 24 – TRANSFER IEP

The Transfer IEP document is located in the Transfer Process.

The Transfer IEP allows the user to determine which process to transfer the student to and creates an IEP document within Synergy SE. The Annual Review and Reevaluation Dates as well as the student’s disability are entered into this document. Those fields are populated into the student’s Synergy SE student record.

The Transfer IEP contains six tabs:

- **Cover**
- **Goals**
- **Services**
- **LRE**
- **Medicaid**
- **Attachments**
- **Cover Tab**

**Transfer IEP**  
 Student Name: **Abbatacola, Emily L.** Student ID: 501001608 Gender: Female Birth Date: 04/29/1999 Grade: 07 IEP Status: Draft Transfer IEP

**Cover** Goals Services LRE Medicaid Attachments

**Dates**

Re-evaluation Due Date	IEP Date	IEP Review Due Date	Process Name	Display 'DRAFT'
	05/25/2012	05/24/2013	Transfer	<input checked="" type="checkbox"/>

Interpreter Needed

**Eligibility**

Primary Eligibility

Secondary Eligibility

<input type="checkbox"/> Autism	<input type="checkbox"/> Developmental Delay	<input type="checkbox"/> Emotional Disability
<input type="checkbox"/> Hearing Impaired	<input type="checkbox"/> Language Impairment	<input type="checkbox"/> MD/Severe Sensory Impairment
<input type="checkbox"/> Mild Intellectual Disability	<input type="checkbox"/> Moderate Intellectual Disability	<input type="checkbox"/> Multiple Disabilities
<input type="checkbox"/> Orthopedic Impairment	<input type="checkbox"/> Other Health Impairment	<input type="checkbox"/> Preschool Severe Delay
<input type="checkbox"/> Severe Intellectual Disability	<input type="checkbox"/> Specific Learning Disability	<input type="checkbox"/> Speech Disability
<input type="checkbox"/> Speech Language Impairment	<input type="checkbox"/> Traumatic Brain Injury	<input type="checkbox"/> Visual Impairment

**Program Recommended**

Program Recommended

**IEP Team Members**

Student Consulted/Present

Refresh Participants from Team

**Parent Participants**

Line	Parent Name	Relation Type	Educational Rights	Contact Allowed	Consulted/Present
1	Abbatacola, David	Father	Yes	Yes	<input type="checkbox"/>
2	Abbatacola, Jill	Mother	Yes	Yes	<input type="checkbox"/>

**Staff Participants** Add

Line	Staff Name	Role	Consulted/Present	Indicate Parent Agreement
1	User, Admin	Case Manager	<input type="checkbox"/>	<input type="checkbox"/>

**Other Participants** Add

Line	Name	Title	Role	Consulted/Present	Indicate Parent Agreement
------	------	-------	------	-------------------	---------------------------

Figure 3-262 Transfer IEP Screen Cover Tab

To create a Transfer IEP document:

### COVER TAB

1. Insert the **Re-evaluation Due Date**, the **IEP Date**, and the **IEP Review Date** (MMDDYY) or click and select date.

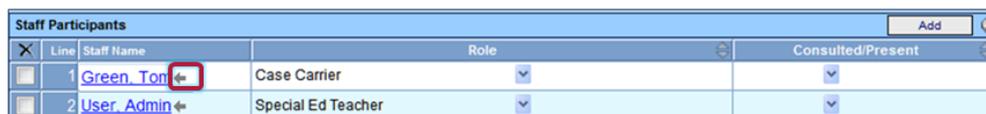
2. Checking **Display “DRAFT”** will display the word DRAFT on all pages of the IEP. Make sure to uncheck this box prior to finalizing or it will display on the finalized IEP.
3. Click Add to Document effort to schedule the IEP Meeting. A new row displays.
4. Enter **Date** (MMDDYY) or click  and select date.
5. Type the **Description** of the effort into the textbox provided.
6. If needed, check  on the line of the documentation record to remove. The row is removed.
7. Indicate if **Interpreter Needed** by selecting **Yes** or **No** from the drop-down provided. If yes is selected, a staff member with the Role of Interpreter must be added.
8. Select the **Primary Eligibility** indicated on the out of district IEP from drop down box. Check all applicable **Secondary Eligibilities**.
9. Enter the **Program Recommended** for this student.
10. Click **Student Consulted/Present** drop-down and select the appropriate option. Selecting either option will place the student in the Participants section of the printable document. If the field is left blank the student will not be included in the Participants list.
11. On the Parent Participants section, click the **Consulted/Present** drop-down and select the appropriate option. The Parent Participants section will display the Parent/Guardians for the student as they appear in Synergy SIS (or other district SIS). Selecting from the Consulted/Present dropdown will place the specific parent in the Participants section of the printable document. If the drop-down is left blank the parent will not be included in the Participants list.

The Staff Participants section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List.

Staff Names displaying will be included as either consulted or present, however changes may be made including additional staff names added.

12. If the staff members **Role** is different for this IEP meeting, click the drop-down and make the appropriate selection.
13. Click the **Consulted/Present** drop-down and select the appropriate option, for each staff participant. If the field is left blank, the staff member will not appear in the Participant Section of the Printable IEP.

Change current staff participant names:



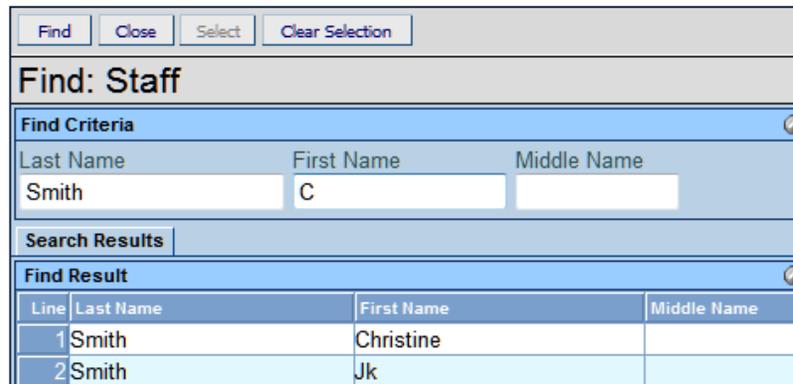
Line	Staff Name	Role	Consulted/Present
1	Green_Ton	Case Carrier	
2	User_Admin	Special Ed Teacher	

Figure 3-263 Transfer IEP Screen Cover Tab Staff Section Change/Add

14. Click  next to the **Staff Name** to change. The Find: Staff screen displays.
15. Enter all or part of staff **Last Name, First Name**.
16. Click  or press ENTER. Search Results displays a list of matching criteria.
17. Click line of staff name. Line highlights.

18. Click again or click . Find: Staff screen closes and staff name displays.
19. Click the **Role** dropdown and select the staff role.

Add staff names:



Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-264 Find: Staff Screen

20. Click **Add** on the **Staff Participants** bar. A new line is added to the grid.
21. Repeat the procedure above.

22. If needed, check  on the line of the **Staff Name** to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

23. Click the **Add** button on the Other Participants bar. A new row will be added.
24. Enter the **Name, Title and Role** of the participant.
25. Click the **Consulted/Present** drop-down and select the appropriate option, for each participant.



**Note:** Staff roles of District Representative and Individual to Interpret Results are required fields. The IEP will display a validation error when finalizing if Staff Participants have not been added with those roles.

## GOALS TAB

Goals added to this IEP will be available in the student's Progress Report once this IEP is finalized.

Figure 3-265 Transfer IEP Screen Goals Tab

1. Add the Grading Periods dates for Progress Reports.

Line	Grading Period Label	Grading Period
1	1st Grading Period	09/30/2010
2	2nd Grading Period	11/24/2010

Figure 3-266 Transfer IEP Screen Goals Tab Progress on Goals

2. Click the Add button on the grading Periods bar. A new line displays.
3. Label the **Grading Period** as desired, (1st Grading Period, 1st Grading Quarter, etc.)
4. Enter the date for the **Grading Periods** (MMDDYY) or click and select date.
5. If needed, check on the line of the **Grading Periods** record to remove. The row is removed.

## ADDING GOALS

Goals can be added to the IEP in five ways:

- **New Blank Goal**
- **Goal Library**
- **Personal Goal Library**
- **Goal Builder**
- **Standard Goal Library**

### NEW BLANK GOAL

1. Select the goal Category from the drop-down box.
2. Click **Add New Blank Goal**. A new row is now added to the Goals section.

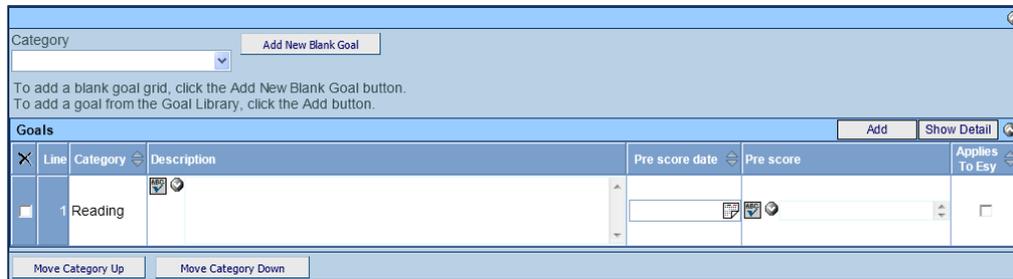


Figure 3-267 Transfer IEP Screen Goals Tab Goals Tab Add New Blank Goal

3. Type the goal in the **Description** textbox. Use to spellcheck. Use for more space.
4. Add the **Goal Pre score date** (MMDDYY) or click and select date.
5. Type the **Pre score** information.
6. If this goal will apply to ESY place a check in the **Applies To ESY** column. By placing a checkmark in this area, the goal will then be imported into appropriate fields the ESY Progress Report and ESY Addendum – GENAZ 505.
7. Repeat above directions to add additional goals.
8. If needed, check on the line of the **Goal** record to remove. The row is removed.
9. Click on the line of the goal. The line highlights.

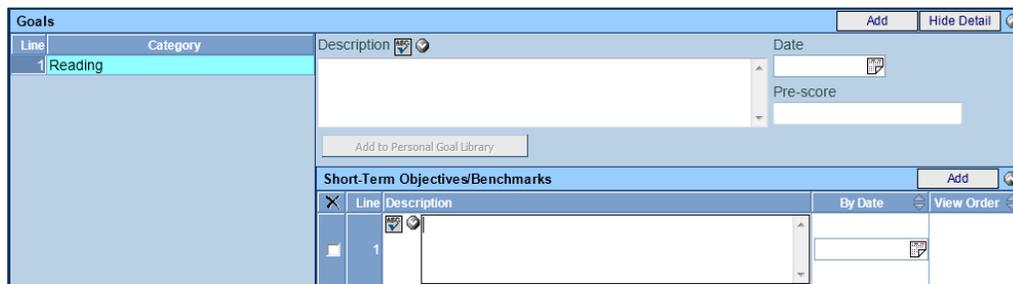


Figure 3-268 IEP Screen Goals Tab Detail View

10. Click the **Show Detail** button. The detail view displays on the right.
11. Click the **Add** button on the Short-term Objectives/Benchmarks bar. A new line is added..
12. Enter the Short-Term Objectives/Benchmarks information in the **Description** textbox. Use to spellcheck. Use for more space.
13. Insert the **By Date**, (MMDDYY) or click and select date when the student will meet the Short-Term Objective/Benchmark.
14. Type a number to indicate **View Order** you would like the Short-Term Objective/Benchmark to appear.
15. Repeat above directions to add additional Short-Terms Objectives.
16. If needed, check on the line of the **Short-Terms Objective** to remove. The row is removed.
17. Click the **Hide Detail** button to close the detailed view.

## GOAL LIBRARY

Figure 3-269 IEP Screen Goals Tab Add Goal

1. Click the **Add** button on the Goals bar. The Goal Library Search screen opens.
2. Click the **Category** drop-down and select.
3. Click the **Sub Category** drop-down and select.
4. Click the **Find** button. The goals matching the criteria selected displays.

Line	Category	Sub Category	Goal
1	Reading	Reading - Grade 1	[STUDENT] will demonstrate improved knowledge of literature by identifying four organizational features of expository text when given (state conditions) scoring (state criteria) as measured quarterly (by your method of evaluation) R:01 S3 C1 PO3 Alt 1
2	Reading	Reading - Grade 1	[STUDENT] will demonstrate improved knowledge of literature by determining which picture/icon matches a story, heard or read, when given two pictures/icons to select from scoring (state criteria) as measured quarterly (by your method of evaluation) R:01 S2 C1 PO1 Alt 3
3	Reading	Reading - Grade 1	[STUDENT] will demonstrate improved knowledge of literature by following a 1-step direction when given tactile symbols or pictures scoring (state criteria) as measured quarterly (by your method of evaluation) R:01 S3 C2 PO1 Alt 2
4	Reading	Reading - Grade 1	[STUDENT] will demonstrate improved knowledge of literature by demonstrating understanding that print materials (objects/partial objects, tactile symbols) are read left to right, with top to bottom progression, when given (state conditions) scoring (state criteria) as measured quarterly (by your method of evaluation) R:01 S3 C1 PO3 Alt 3

Figure 3-270 IEP Screen Goals Tab Assign Goal

5. Click anywhere on the line of the appropriate goal. The line highlights.
6. Click the **Assign** button to add the selected goal to the student's IEP. A pop-up window displays containing the goal and stating that the goal has been added successfully to the IEP.
7. Click **OK**.
8. The Goal Library Search screen will remain open, allowing for additional goals to be added. When all goals have been added, close this window. The selected goals will populate in the IEP.
9. The goals are contained in editable textboxes. Edit the criteria as necessary. Use to spellcheck. Use for more space.
10. Add **Pre score date** and **Pre score** in textboxes provided.
11. Place a check in the **Applies to ESY** column checkbox, if this goal should apply to ESY. The selected goal will be imported into the ESY Progress Report and the ESY Addendum – GENAZ 505.
12. Click on the line of the goal. The line highlights.

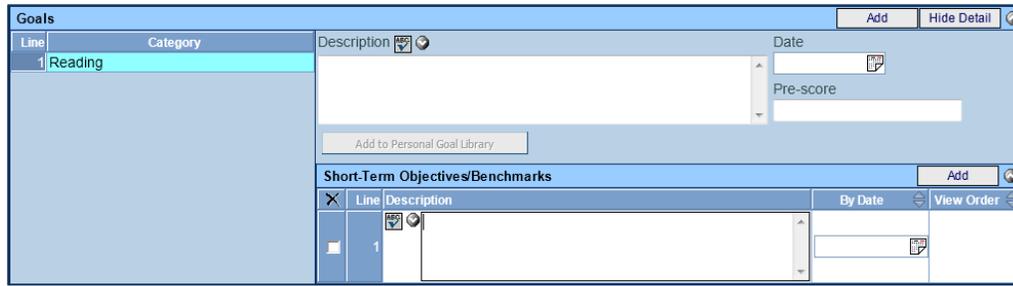


Figure 3-271 IEP Screen Goals Tab Detail View

13. Click the **Show Detail** button. The detail view displays on the right.
14. Click the **Add** button on the Short-term Objectives/Benchmarks bar. A new line is added..
15. Enter the Short-Term Objectives/Benchmarks information in the **Description** textbox. Use to spellcheck. Use for more space.
16. Insert the **By Date**, (MMDDYY) or click and select date when the student will meet the Short-Term Objective/Benchmark.
17. Type a number to indicate **View Order** you would like the Short-Term Objective/Benchmark to appear.
18. Repeat above directions to add additional Short-Terms Objectives.
19. If needed, check on the line of the **Short-Terms Objective** to remove. The row is removed.
20. Click the **Hide Detail** button to close the detailed view.

**PERSONAL GOAL LIBRARY**

Before adding a goal from your Personal Goal Library you must first add goals to your library. Goals are added to your Library after you have added commonly used goals to you IEP.

1. To add goals to your Personal Goal Library, open an IEP you have already completed with the desired goals:
2. Click on the line of the goal. The row highlights.
3. Click the **Show Detail** button. The detail view displays on the right.
4. Click . The Goal Personal Library window opens allowing you to edit the goal selected. State Standards and Benchmarks may be added in this section to allow for easier Goal adding.

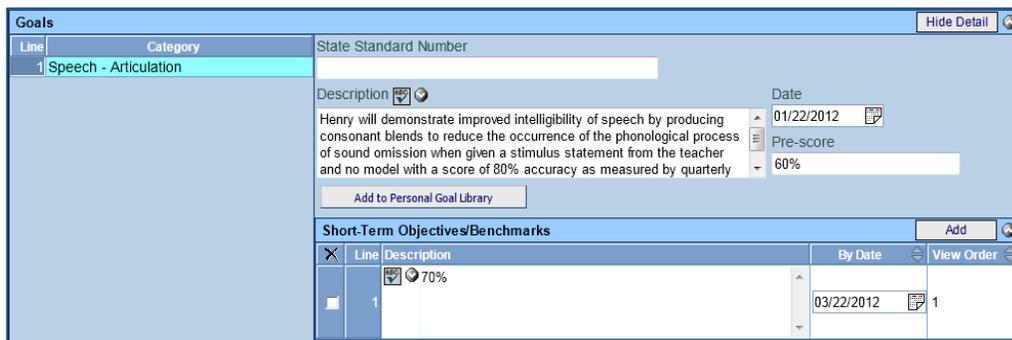


Figure 3-272 IEP Screen Goals Tab Add to Personal Goal Library

5. Click .

Once you have added goals to your Personal Goal Library they are available for use.

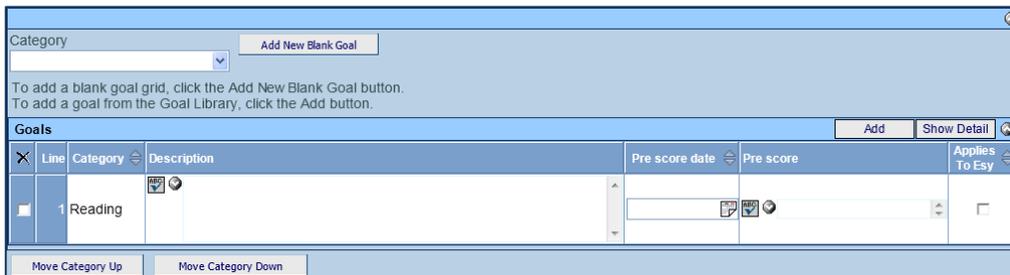


Figure 3-273 IEP Screen Goals Tab Personal Goal Library

6. Click the **Add** button on the Goals bar. The Goal Library Search screen opens.
7. Click the **Category** drop-down list and select.

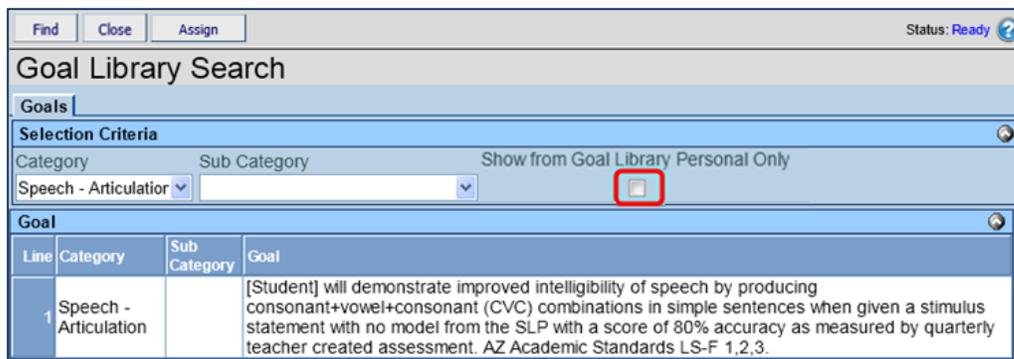


Figure 3-274 IEP Screen Goals Tab Goal Library Personal Only

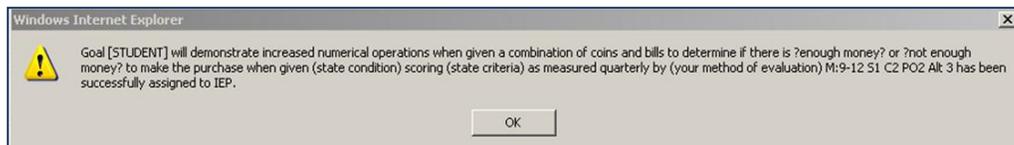


Figure 3-275 IEP Screen Goals Tab Goal Added Successfully

8. Click on the Show from Goal Library Personal Only checkbox.
9. Click **Find**. The goals matching the criteria selected displays
10. Select the appropriate goal by highlighting the goal statement anywhere in the row.
11. Click **Assign** to add the selected goal to the student's IEP.

A pop-up window displays containing the goal stating that the goal has been added successfully to the IEP.

12. Click **OK**. The Goal Library Search Window will remain open allowing for additional goals to be added.
13. When all goals have been added, close this window. The selected goals will populate in the IEP.
14. The goals are contained in editable textboxes. Edit the criteria as necessary.
15. Add **Pre score date** and **Pre score** in textboxes provided.
16. Place a check in the **Applies to ESY** column if this goal should apply to ESY. The selected goal will be imported into the ESY Progress Report and the ESY Addendum – GENAZ 505.
17. Click on the line of the goal. The line highlights.

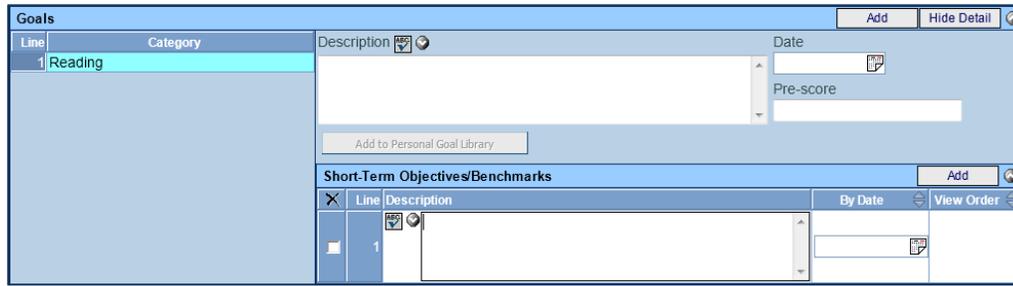


Figure 3-276 IEP Screen Goals Tab Detailed View

18. Click the **Show Detail** button. The detail view displays on the right.
19. Click the **Add** button on the Short-term Objectives/Benchmarks bar. A new line is added..
20. Enter the Short-Term Objectives/Benchmarks information in the **Description** textbox. Use to spellcheck. Use for more space.
21. Insert the **By Date**, (MMDDYY) or click and select date, of when the student will meet the Short-Term Objective/Benchmark.
22. Type a number to indicate **View Order** you would like the Short-Term Objective/Benchmark to appear.
23. Repeat above directions to add additional Short-Terms Objectives.
24. If needed, check on the line of the **Short-Terms Objective** to remove. The row is removed.
25. Click the **Hide Detail** button to close the detailed view.

**GOAL BUILDER**

1. Select the goal **Category** using the available categories in the drop-down box.
2. Type in the **Timeframe** for the goal.
3. Type in the **Condition** for the goal.
4. Type in the **Behavior** for the goal.
5. Type in the **Criterion**.

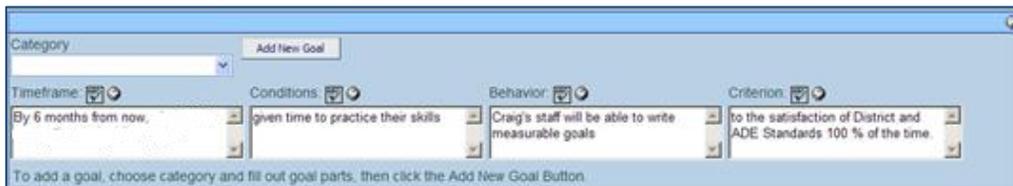


Figure 3-277 IEP Screen Goals Tab Goal Builder

6. Click the **Add New Goal** button. The goal builder automatically combines the entered information into a complete goal in the Goals Section.

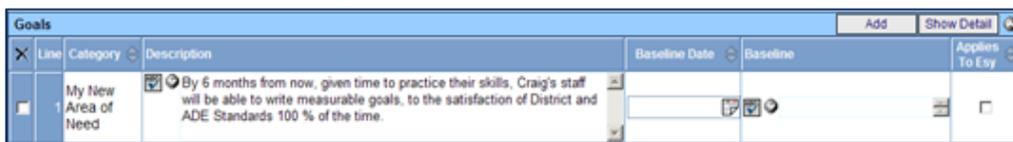


Figure 3-278 IEP Screen Goals Tab Goal Builder Completed

7. Add **Baseline Date** (MMDDYY) or click and select date.
8. Enter **Baseline** in the textbox provided.

9. Place a check in the **Applies to ESY** column if this goal should apply to ESY. The selected goal will be imported into the ESY Progress Report and the ESY Addendum – GENAZ 505.
10. If needed, check  on the line of the **Goal** to remove. The row is removed.
11. Click on the line of the goal. The line highlights.

Figure 3-279 IEP Screen Goals Tab Detailed View

12. Click the **Show Detail** button. The detail view displays on the right.
13. Click the **Add** button on the Short-term Objectives/Benchmarks bar. A new line is added..
14. Enter the Short-Term Objectives/Benchmarks information in the **Description** textbox. Use  to spellcheck. Use  for more space.
15. Insert the **By Date**, (MMDDYY) or click  and select date, of when the student will meet the Short-Term Objective/Benchmark.
16. Type a number to indicate **View Order** you would like the Short-Term Objective/Benchmark to appear.
17. Repeat above directions to add additional Short-Terms Objectives.
18. If needed, check  on the line of the **Short-Terms Objective** to remove. The row is removed.
19. Click the **Hide Detail** button to close the detailed view.

Figure 3-280 IEP Screen Goals Tab Standard Goal Library

### STANDARD GOAL LIBRARY

1. From the **Standard Type** drop-down select the standard area for the goal.
2. Select the **Grade** level of the standard to add using the drop-down.
3. Select the **Need Area** from the drop-down.
4. Click the **Add Standard Goal** button. The Standard window will open.

- Click on  next to the desired standard. The performance objectives display below and  turns to .

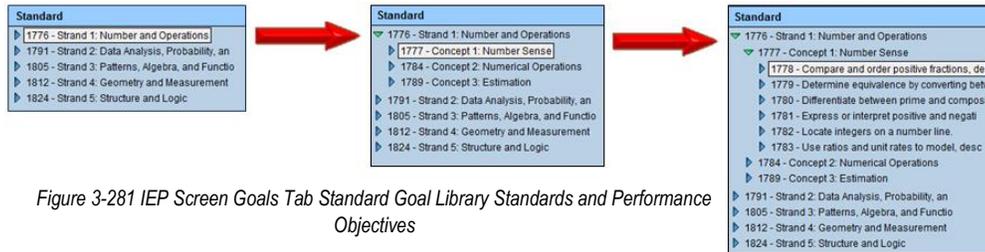


Figure 3-281 IEP Screen Goals Tab Standard Goal Library Standards and Performance Objectives

- Click on the desired performance objective.
- Check the goals desired in the **Add** column.
- Click Add Goals.

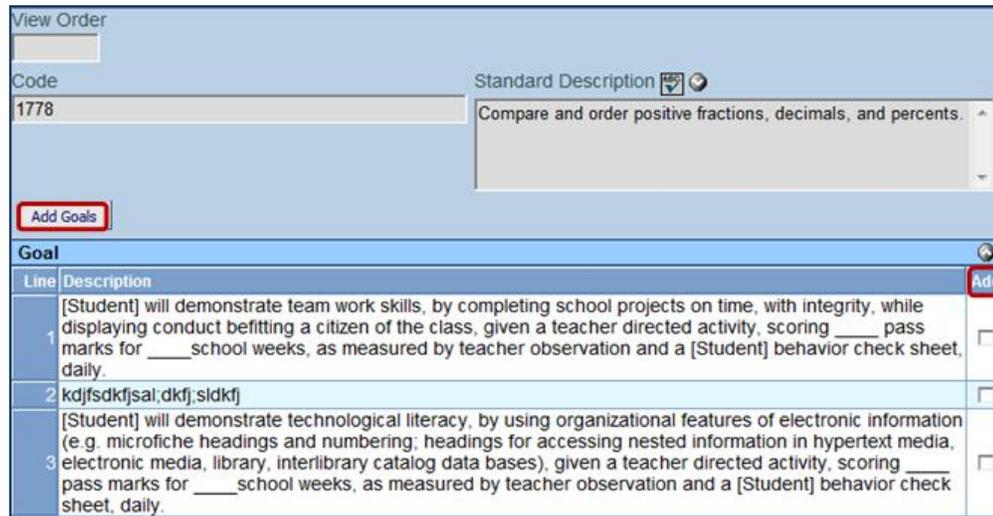


Figure 3-282 IEP Screen Goals Tab Add Goals

- A pop-up message displays for each added goal letting you know that the goal(s) has/have been successfully assigned to the IEP. Click the **OK** button to close the message.
- Close the **Standard** screen. The goals have now been added and are ready for editing.

Add a goal from the Standard Goal Library: Select Standard Type, Grade, and Need Area and click the Add Standard Goal Button

Standard Type: \_\_\_\_\_ Grade: 10 Need Area: \_\_\_\_\_ Add Standard Goal

Goals	Line	Category	State Standard Number	Description	Pre score date	Pre score	Applies To Easy
	1	Math	1778	Adam will demonstrate team work skills, by completing school projects on time, with integrity, while displaying conduct befitting a citizen of the class, given a teacher directed activity, scoring ___ pass marks for ___ school weeks, as measured by teacher observation and a Adam			<input type="checkbox"/>
	2	Math	1778	Adam will demonstrate technological literacy, by using organizational features of electronic information (e.g. microfiche headings and numbering; headings for accessing nested information in hypertext media, electronic media, library, interlibrary catalog data bases), given a			<input type="checkbox"/>

Figure 3-283 IEP Screen Goals Tab Goals Added

Goals will automatically be sorted by Category. The order of categories can be changed.

- Click the line number of a goal. The goal highlights.

Goals			
Line	Category	Description	
1	Alternate Academic Stds - Math	Harry will demonstrate increased numerical operations when given a combination of coins and bills to determine if there is ?enough money? or ?not enough money? to make the purchase when given (state condition) scoring (state criteria) as measured quarterly by (your	
2	Alternate Academic Stds - Math	Harry will demonstrate increased data analysis with appropriate graphical representation by using labels, titles, and organized data provided to construct a graph scoring (state criteria) as measured quarterly (by your method of evaluation) M:9-12 S2 C1 PO2 Alt 2	
3	Alternate Academic Stds - Math	Harry will demonstrate increased data analysis with appropriate graphical representation by using labels, titles, and organized data provided to construct a graph scoring (state criteria) as measured quarterly (by your method of evaluation) M:9-12 S2 C1 PO2 Alt 2	
4	Speech - Voice	Harry will demonstrate an improved awareness of vocal quality by generating a list of substitute (nonvocal) behaviors to use in given situation when given a stimulus question and situational context by the teacher with a score of ( ) accuracy as measured by a	
5	Speech - Articulation	Harry will demonstrate improved intelligibility of speech by producing understandable utterances containing no more than ( )% unintelligible words when given a trained listener and stimulus pictures/objects related to a structured classroom activity with a score	

Move Category Up    Move Category Down

Figure 3-284 IEP Screen Goals Tab Sort

12. Click **Move Category Up** or **Move Category Down** to move the goal to the top or bottom of the Goals list.
13. Click Save.

**SERVICES TAB**

Services will display the type, location and duration of special education services provided to the student. If the service is a Medicaid Billable service it will calculate the service hours.

**Transfer IEP**

Student Name: **Abbatacola, Emily L.** Student ID: 501001608 Gender: Female Birth Date: 04/29/1999 Grade: 07 IEP Status: Draft Transfer IEP

Cover Goals Services LRE Medicaid Attachments

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**Special Education Services** Add Show Detail

Line	View Order	Specially Designed Instruction	Provider Role	Location	Amount of Time		Date of Initiation On/About	Duration of Service	Medicaid Hours Per Year																														
					Minutes	Frequency Unit																																	
<p><b>Related Service</b></p> <p>The team considered the need for related services and determined that the student</p> <p><span>▼</span></p>																																							
<p><b>Related Services</b> <span>Add</span> <span>Show Detail</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Line</th> <th>View Order</th> <th>Related Services</th> <th>Provider Role</th> <th>Location</th> <th colspan="2">Amount of Time</th> <th>Date of Initiation On/About</th> <th>Duration of Service</th> <th>Medicaid Hours Per Year</th> </tr> <tr> <td colspan="5"></td> <th>Minutes</th> <th>Frequency Unit</th> <td colspan="3"></td> </tr> </thead> <tbody> <tr> <td colspan="10"> <p><span>▼</span></p> </td> </tr> </tbody> </table>										Line	View Order	Related Services	Provider Role	Location	Amount of Time		Date of Initiation On/About	Duration of Service	Medicaid Hours Per Year						Minutes	Frequency Unit				<p><span>▼</span></p>									
Line	View Order	Related Services	Provider Role	Location	Amount of Time		Date of Initiation On/About	Duration of Service	Medicaid Hours Per Year																														
					Minutes	Frequency Unit																																	
<p><span>▼</span></p>																																							

Services Justification ▼

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**Transportation** Show Detail

There are no Auto-Populate entries for the specified question

- ▼ The student will receive Special Education transportation for the duration of this IEP due to the disability and to access the program site. Curb to curb transportation to address needs that are indicated in the IEP will be provided.
- ▼ The student will receive Special Education transportation for the duration of this IEP due to the disability and to access the program site. Adult assistance to address needs that are indicated in the IEP will be provided.

Figure 3-285 Transfer IEP Screen Services Tab

1. Click the **Add** button to add a new special education service. A new row displays.
2. Click the **Provider Role** drop-down box and select the appropriate provider.
3. Click the **Location** drop-down box and select the appropriate location.
4. Enter the **Amount of Time** using quarter hour increments in the **Hours** textbox. (i.e., 2.25, 5.50, 3.75, etc.)
5. Select the correct **Frequency Unit** using the options in the frequency drop-down box.
6. Enter **Date of Initiation On/About** (MMDDYY) or click  and select date.
7. Enter **Duration of Service** (MMDDYY) or click  and select date. If left blank, upon saving, the Duration of Service automatically populates the date, calculated for the next IEP (1 year minus 1 day).

Special Education Services								
X	Line	View Order	Specially Designed Instruction	Provider Role	Location	Amount of Time		Date of Initiation On/About
						Hours	Frequency Unit	
	1		Advocacy Skills	Special Ed Te	Special Ed Class	2.50	per week	07/06/2012

Figure 3-286 IEP Screen Services Tab Duration of Service

If the service added is Medicaid billable the Medicaid Hours Per Year will automatically calculate and be entered into the Medicaid Column.

8. Click line of **Specially Designed Instruction**. Line highlights.
9. Click again or click Show Detail. The detailed view displays on right.
10. Select the **Detail Description Code** using the drop-down statement box.
11. Type in the **Detail Description**. Use  to spellcheck. Use  for more space.

Special Education Services								Add	Hide Detail
Line	Specially Designed Instruction	Provider Role	Location	Hours	Frequency Unit	Date of Initiation On/About	Duration of Service		
1	Functional Communication (SLI)	Special Ed Te	Special Ed Classroom	2.50	per week	07/06/2012	07/05/2013		
		Detail Description Code							
		Detail Description							

Figure 3-287 IEP Screen Services Tab Specifically Designed Instruction

12. Click **Hide Detail** to close the detailed view.

Related Services

13. Click the drop-down in the Related Service box and complete the statement.
14. If the student is not in need of Related Services, move on to the Transportation section.

Related Service										
The team considered the need for related services and determined that the student is in need of related services.										
Related Services										
X	Line	View Order	Related Services	Provider Role	Location	Amount of Time		Date of Initiation On/About	Duration of Service	Medicaid Hours Per Year
						Hours	Frequency Unit			

Figure 3-288 IEP Screen Services Tab Related Service Statement

15. If the student requires Related Services, click **Add** on the Related Services bar.
16. Click the **Related Service** drop-down and select.

17. Click the **Provider Role** drop-down box and select.

Related Services				
Line	View Order	Related Services	Provider Role	Location
1				

Figure 3-289 IEP Screen Services Tab Related Service

18. Click the **Location** drop-down and select.
19. Enter the **Amount of Time** using quarter hour increments in the **Hours** textbox. (i.e., 2.25, 5.50, 3.75, etc.)
20. Select the correct **Frequency Unit** using the options in the frequency drop-down box.
21. Enter **Date of Initiation On/About** (MMDDYY) or click and select date.
22. Enter **Duration of Service** (MMDDYY) or click and select date. If left blank, upon saving, the Duration of Service automatically populates the date, calculated for the next IEP (1 year minus 1 day). Enter the Amount of Time using quarter hour increments in the Hours textbox. (i.e., 2.25, 5.50, 3.75, etc.)

If the related service is Medicaid billable, the Medicaid Hours Per Year will automatically populate, based upon the Amount of Time selected and the Duration of Service.

Amount of Time		Date of Initiation On/About	Duration of Service	Medicaid Hours Per Year
Hours	Frequency Unit			
0.50	per day	07/05/2012	07/04/2013	128.00

Figure 3-290 IEP Screen Services Tab Medicaid Hours Per Year

23. Click the Services Justifications drop-down and select. The statement will populate the textbox below. Custom statements may be added directly to the textbox, also.

Services Justification

Figure 3-291 IEP Screen Services Tab Services Justifications

24. After reading the text in the transportation section, answer **Yes** or **No** to each statement using the drop-downs. If **No** is selected, continue to the Services Tab. If **Yes** is selected to either statement, additional fields display.
25. In the second section, select **Yes** or **No** from **The student requires...** drop-down.

**Transportation**

Transportation is a team decision. It is based on need not on a specific disability. NOTE: Transportation is a related service, so you must provide the justification for it in the PLAAFP. What are the student's behavioral needs or needs for specialized equipment that require transportation in a special bus? Example: 1) Mary requires a harness on the bus since she has been known to unbuckle/squirm out of her seat belt. She stands up and walks around the bus in motion. 2) John has a history of hitting other students and requires a special bus where he can be closely monitored.

Yes  The student will receive Special Education transportation for the duration of this IEP due to the disability and to access the program site. Curb curb transportation to address needs that are indicated in the IEP will be provided.

No  The student will receive Special Education transportation for the duration of this IEP due to the disability and to access the program site. Adult assistance to address needs that are indicated in the IEP will be provided.

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The student requires medically necessary transportation to and from school and meets at least one of the following criteria:

Student requires transportation in an adapted vehicle.

Description

Student has behavioral problems and must be transported separately from non-disabled students.

Description

Figure 3-292 IEP Screen Services Tab Transportation Section

26. Check if the **Student requires transportation in an adapted vehicle**. If selected, either type in a **Description** of the necessary vehicle adaptations or select the appropriate statements from drop-down box. As many adaptations may be selected as needed using the drop-down statements.
27. Check if the **Student has behavioral problems and must be transported separately from non-disabled students**. If selected, either type in a **Description** of the behavioral concerns or select the appropriate statements from drop-down box. As many behavioral concerns may be selected as needed using the drop-down statements.

These are Medicaid Billable items that, if selected, will reflect on the Consent to Claim Medicaid Reimbursement that prints with the IEP.

**LRE TAB**

(Least Restrictive Environment)

Figure 3-293 Transfer IEP Screen LRE Tab

**PRESCHOOL STUDENTS**

If the student is in grade Preschool, the Least Restrictive Environment can be selected for both preschool services and elementary services.

1. Select the appropriate LRE statement from the **Pre School** drop-down list.

Figure 3-294 IEP Screen LRE Tab Pre School Statement Pre School Drop-down

2. Select the appropriate LRE statement from the **Elementary and Secondary** drop-down list.

Figure 3-295 IEP Screen LRE Tab Pre School Statement Elementary and Secondary Drop-down

ELEMENTARY AND SECONDARY STUDENTS

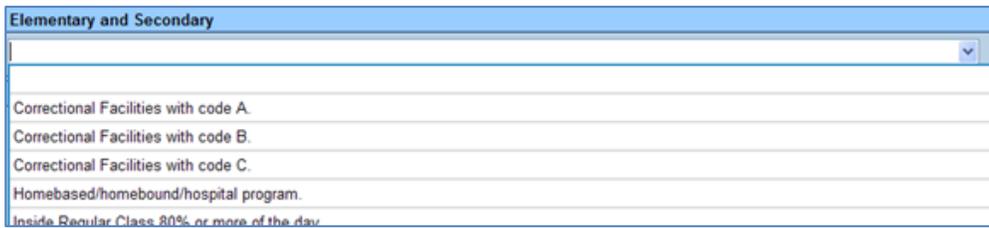


Figure 3-296 IEP Screen LRE Tab Elementary and Secondary Statement Drop-down

3. Select the appropriate LRE statement from the **Elementary and Secondary** drop-down list.
4. Select the appropriate statement from the drop-down list under **Rationale for LRE selection:**. This will populate the textbox below which can be edited.

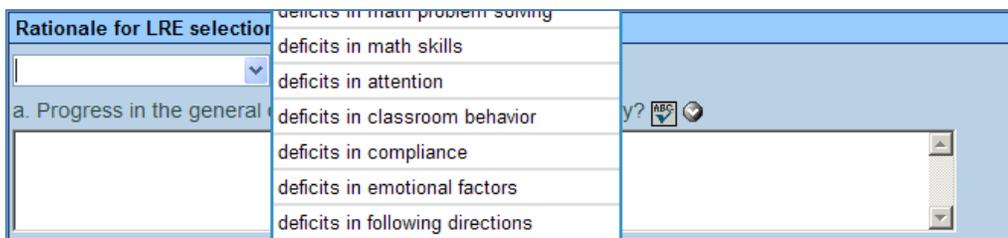


Figure 3-297 IEP Screen LRE Tab A.

5. Select if the services will be provided at the student home school or not using the drop-down statement box. If **No** is selected, an additional box displays asking for an explanation of why.

Potential harmful effects of the placement

6. Select the appropriate effect from the drop-down list. This will populate the textbox below which can be edited.

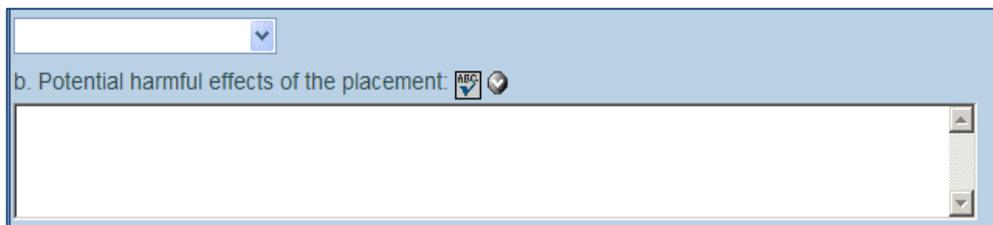


Figure 3-298 IEP Screen LRE Tab B.

7. Select the extent the student will not participate from the drop-down list. This will populate the textbox below which can be edited.

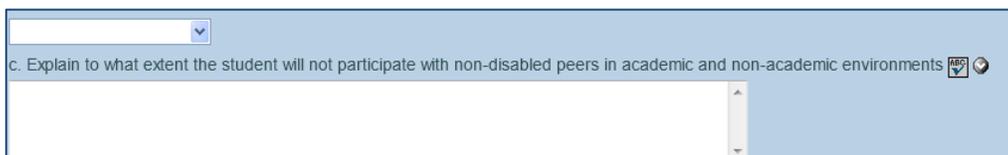


Figure 3-299 IEP Screen LRE Tab C.

8. Click **Save**.

## MEDICAID TAB

The Medical section provides a list of items pertaining to services provided by Health Assistants.

**Transfer IEP**  
 Student Name: **Abbatacola, Emily L.** Student ID: 501001608 Gender: Female Birth Date: 04/29/1999 Grade: 07 IEP Status: Draft Transfer IEP

Cover Goals Services LRE **Medicaid** Attachments

**Medicaid DSC Health Related Services**  
 Complete all areas as needed  
 (includes all Health Aides assisting students that have Health Related Needs stated on the IEP. One-on-one and/or extensive individualized aide services must also be thoroughly described and listed as a Related or Supplemental Service)

**Assistance with Personal Care/Activities of Daily Living**  
 A health aide will assist with Student's ADL needs, including those listed below, for \_\_\_\_\_ for the duration of the IEP.

Eating/Feeding:  
 \_\_\_\_\_  
 \_\_\_\_\_

Grooming:  
 \_\_\_\_\_  
 \_\_\_\_\_

Dressing:  
 \_\_\_\_\_  
 \_\_\_\_\_

Use of Assistive Devices: Reference to the need for assistive devices and type of items MUST be included in Present Level statement and/or Goals  
 \_\_\_\_\_  
 \_\_\_\_\_

Mobility:  
 \_\_\_\_\_  
 \_\_\_\_\_

Toileting:  
 \_\_\_\_\_  
 \_\_\_\_\_

Transfers:  
 \_\_\_\_\_  
 \_\_\_\_\_

Positioning:  
 \_\_\_\_\_

Figure 3-300 Transfer IEP Screen Medicaid Tab

9. Check the appropriate boxes and enter any pertinent information in the textboxes provided. Use  to spellcheck. Use  for more space.
10. Click .

If any Personal Care/ADL Services have been added to the student's Services Tab they will reflect in this section.

Line	Specially Designed Instruction/Related Services	Primary	Location	Amount of Time		Date of Initiation On/About	Duration of Service	Medicaid Hours Per Year
				Hours	Frequency Unit			
1	Aide Svcs - Personal Care/ADL	<input type="checkbox"/>	Classroom/Camp	3.00	per day			540.00

Figure 3-301 IEP Screen Medical Tab Personal ADL Services

Duration/Frequency of Health Aide Assistance - Personal Care/ADL

Figure 3-302 IEP Screen Medical Tab Personal ADL Services Populated.

### ATTACHMENTS TAB

The Attachments tab allows for the attachment of documents to the MET Report (such as Compuscore printouts of testing, supporting documentation from service providers, etc.) Documents included here will print at the back of the MET Report as a single document, but will not have continuous page numbers or headings.

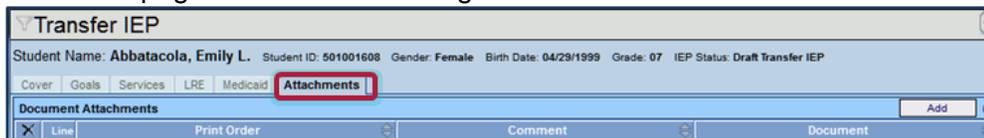


Figure 3-303 Transfer IEP Screen Attachments Tab

1. Click the **Add** button to add an attachment. A new window opens.
2. Click the **Browse** button and select the file you wish to upload.

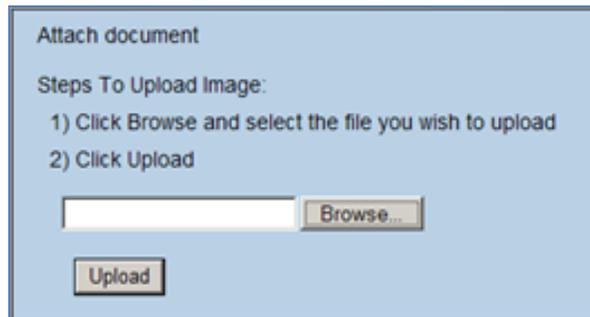


Figure 3-304 Attach Document Screen

3. Click Upload.

The name of the document displays in the **Comment** column. The type of document, Word or PDF, displays in the **Document** column.

Word Document Attachments				Add
Line	Print Order	Comment	Document	
1	1	MED CERT		

Figure 3-305 IEP Screen Attachments Tab Attachments List

4. The **Print Order** is the order the document will be printed following the MET report. This may be changed by typing in a different order.

**Note:** Attachments must be in Word or PDF format.

## FINALIZE THE TRANSFER IEP



**Caution:** To guard against documents moving to Historical Docs before their time, only the student's Case Carrier should Finalize the IEP, unless the school district has designated another user to be in charge of finalizing.

When the IEP is finalized, all existing documents, including a copy of the IEP, will be sent to Historical Docs. The student will be moved to the next appropriate process. The next process is usually the Annual Review, unless the student's next Triennial Reevaluation date is due in less than 6 months, in which case they would be moved to the Reeval process.

1. Click the **Finalize** button in the Action Bar of the document.



Figure 3-306 IEP Finalize Button

If the Validation process has not yet been completed, it will be forced to run now. Once the document has been successfully validated, the Finalize process will begin.

If any active documents for this student HAVE NOT been finalized the Process Move Errors window displays.

Process Move Errors					
Please resolve all errors listed below to proceed with the process move.					
General Errors					
Line	Error Message				
Document Errors					
Line	Document ID	Document Name	Error Message	Delete	Finalize
1	GENAZ 03	Parent Input	All process documents must be finalized or deleted	X	Yellow icon
2	GENAZ 01	Referral	All process documents must be finalized or deleted	X	Yellow icon

Refresh Error List

Figure 3-307 IEP Process Move Errors List

Active documents must be either finalized or deleted before advancing through the finalizing process.

2. To finalize, click the **yellow icon** associated with the document. The document will open allowing it to be finalized.
3. To delete, click on the "X" in the Delete column. The document will be deleted. The Delete option is a district security option and some users may not have access to the delete option.
4. Once all documents have been deleted or finalized, click [Refresh Error List](#).

5. When the list displays no more **Document Errors** the window can be closed.

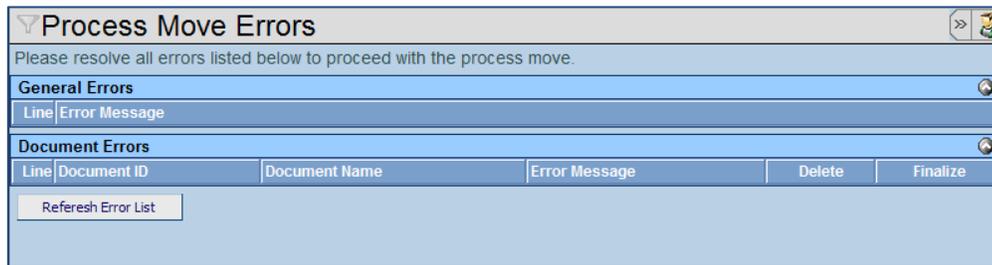


Figure 3-308 IEP Process Move Errors List Cleared

6. Click **Finalize** again from the action bar in the IEP.

Prior to the completion of the Finalize process a window prompt displays confirming the Finalization of the IEP.

7. Type **Yes** in the textbox provided.

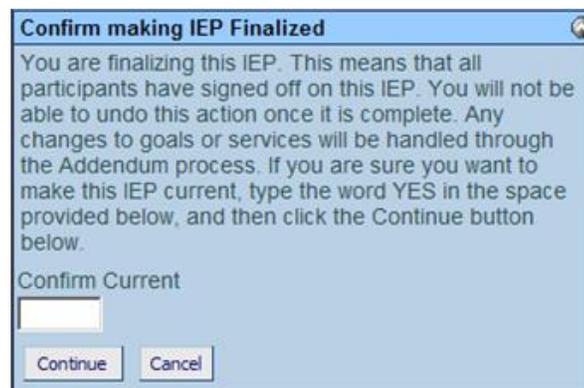


Figure 3-309 IEP Confirm IEP Finalize Message

8. Click **Continue**. A printable version of the IEP will display.  
9. Close or print the finalized IEP.

The following events will have occurred:

The student will have been moved to the next appropriate process, most likely the Annual Review process.

The finalized documents are available in Historical Docs with a working copy of the IEP available (yellow icon).

The Progress Report has been created containing the student's goals from the finalized IEP.

The Reevaluation Date and Annual Review Date have been updated and appear in the date columns.

## GENAZ 25 – NOTICE OF REFERRAL (PRESCHOOL)

The Notice of Referral (Preschool) is located in the Preschool Process.



**Note:** The Notice of Referral (Preschool) has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Referral (Preschool) contains one tab:

- **Prior Written Notice**

Figure 3-310 Notice of Referral (Preschool) Screen

To create a Notice of Referral document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

2. Click on the drop-down box located above the textbox.

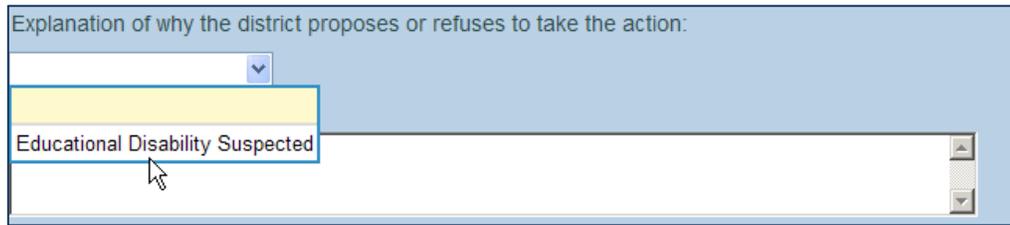


Figure 3-311 Notice of Referral (Preschool) ScreenStatements Section Drop-down

3. Select the desired key-word stem in the drop-down list.

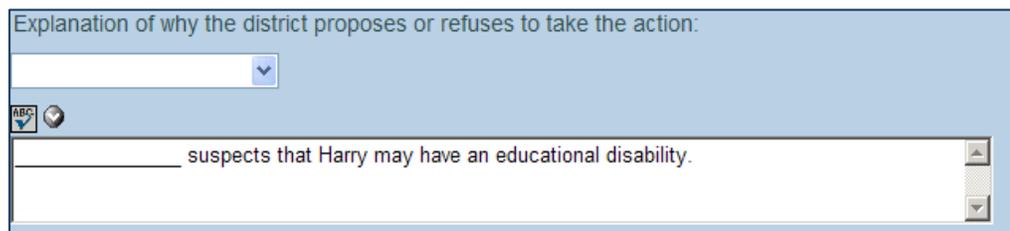


Figure 3-312 Notice of Referral (Preschool) ScreenStatements Section Populated

4. The statement associated with the key-word stem selected will appear in the textbox. Use to spellcheck. Use for more space.
5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click next to **This document was prepared by:**. The Find: Staff screen displays.
8. Enter all or part of staff **Last Name, First Name**.
9. Click or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.

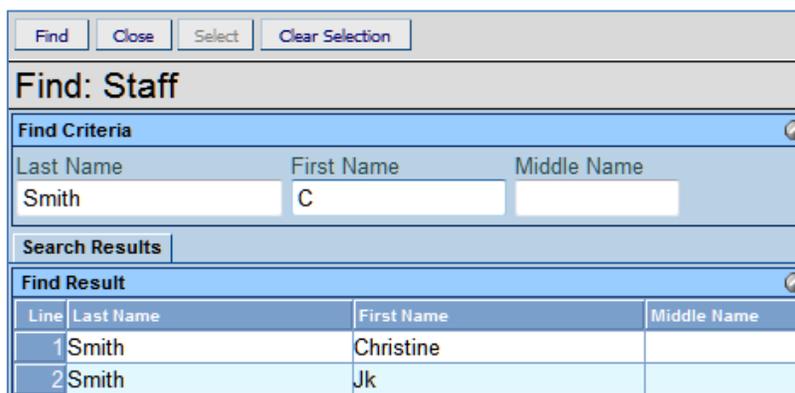


Figure 3-313 Find: Staff Screen

11. Click again or click . Find: Staff screen closes and staff name displays. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 26 – NOTICE OF EVALUATION DECISION (PRESCHOOL)

The Notice of Evaluation Decision (Preschool) is located in the Preschool Process.

The Notice of Evaluation Decision (Preschool) provides the user with two options:

- **Decision to Evaluate:** If the option to evaluate the student is selected, the document will be created and finalized and the student will remain in the Initial process.
- **Decision to *NOT* Evaluate:** If the option to NOT evaluate the student is selected, the document will be created and finalized and the student will be exited from Synergy SE. The notice and all other previously created documents will move to the student's historical documents.

[\(See: Documents With Unique Functionality\)](#)



**Note:** The Notice of Evaluation Decision (Preschool) has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Evaluation Decision (Preschool) contains one tab:

- **Prior Written Notice**

**Prior Written Notice**

Student Name: Sabin, Heather R. Document: GENAZ 26 Description: Notice of Evaluation Decision

**Prior Written Notice**

Document Name: Notice of Evaluation Decision Document Date: [Date Picker]

**Decision**

Current Decision: Evaluate [Change Decision To "Not Evaluate"](#)

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Evaluation  
The Multidisciplinary Evaluation Team (MET) has decided to collect additional data on your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:  
[Text Area]

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:  
[Text Area]

Description of other options considered and why those options were rejected:  
[Text Area]

Description of the factors relevant to the actions proposed or refused are:  
[Text Area]

**Implementation of Decision**

This decision is proposed to be implemented on: [Date Picker]

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
[Text Area] (initials)

This document was prepared by:  
Admin User

Case Manager: User, Admin Case Manager Phone: [Text Area]

Figure 3-314 Notice of Evaluation (Preschool) Screen

To create Notice of Evaluation Decision (Preschool) document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.
2. The Notice of Evaluation opens in Evaluate mode. To change the decision click [Change Decision To "Not Evaluate"](#). Current Decision will display **Not Evaluate**.
3. The Current Decision can be changed back to Evaluate by clicking [Change Decision To "Evaluate"](#).

Based on the decision made above the document will display the appropriate text in the Statement fields and drop-down selections.

There are four statement areas for the explanations of action taken. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly into the textboxes.

- Click on the drop-down box located above the textbox.

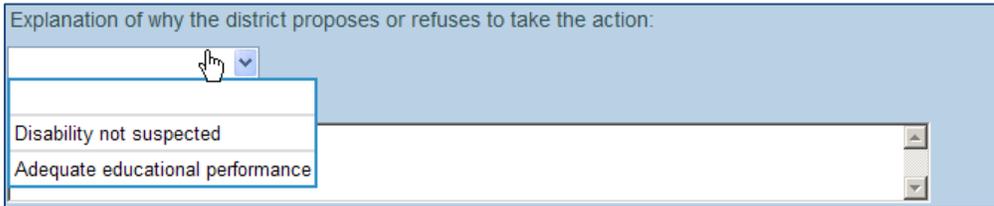


Figure 3-315 Notice of Evaluation (Preschool) Screen Sentence Stem Drop-down

- Select the desired key-word stem in the drop-down list.

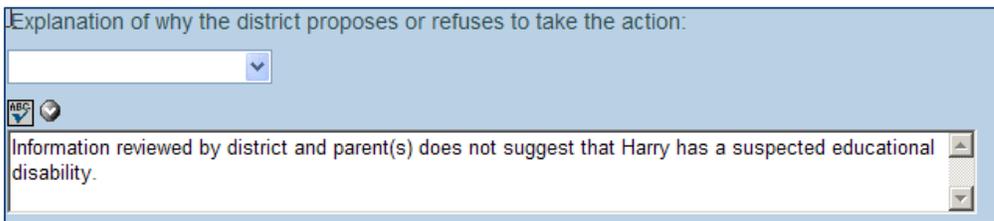


Figure 3-316 Notice of Evaluation (Preschool) Screen Inserted Statement

- The statement associated with the key-word stem selected will appear in the textbox. The statement can then be edited and spell checked if desired.
- Enter the **This decision is proposed to be implemented on:** date (MMDDYY) or click  and select date.
- Enter **(initials)** to signify that the Procedural Safeguards were provided to parent.
- Click **←** next to the **This document was prepared by:** to select the staff name. The Find: Staff screen displays.

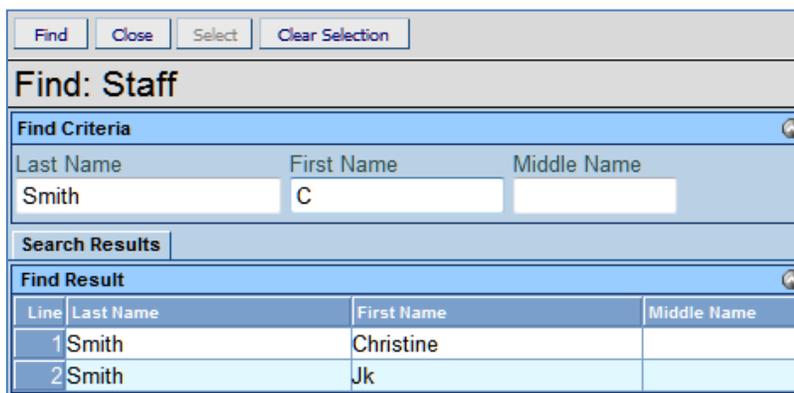


Figure 3-317 Find: Staff Screen

- Enter all or part of staff **Last Name, First Name**.
- Click  or press ENTER. Search Results displays a list of matching criteria.
- Click line of staff name. Line highlights.

If the option selected on this Notice was to *NOT* Evaluate, all previously created documents for this student will move to the Historical Documents tab and the student will be removed from your

Portfolio. If the student is ever referred for another evaluation they can be pulled back into the Initial Process.

Once [finalized](#), a Student Exit from Special Ed screen will display.

13. The **Exit Date** will default to the current date and can be changed using the Calendar Icon.
14. Select the **Exit Reason** from the statements available in the drop-down box and type in the **Exit Explanation**.
15. Click the **Exit from Special Ed** button. A **Cancel** button is available if you are not ready to exit the student, yet. If the cancel option is selected, the document will remain not finalized and in the *In Progress* state.

**Exit Process**

You have indicated the student is not eligible for special ed for this disability. Is the student continuing in special ed because they are eligible for another disability? If you are sure you want to exit from special ed, please type in the fields below.

Exit Date      Exit Reason      Exit Explanation

07/05/2012      [Dropdown]      [Text Field]

[Continue in Special Ed]      [Exit from Special Ed]      [Cancel]

Figure 3-318 Exit Process Screen Exit from Special Ed

## GENAZ 27 – NOTICE OF PLACEMENT (PRESCHOOL)

The Notice of Placement (Preschool) is located in the Preschool Process.



**Note:** The Notice of Placement (Preschool) has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Notice of Placement (Preschool) contains one tab:

- **Prior Written Notice**

**Prior Written Notice**

Student Name: **Akins, Shawn E.** Document: **GENAZ 27** Description: **Notice of Placement**

Prior Written Notice [ ]

Document Name: **Notice of Placement** Document Date: [ ]

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
The evaluation team has received a referral for a possible comprehensive evaluation of your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:  
[ ]

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:  
[ ]

Description of other options considered and why those options were rejected:  
[ ]

Description of the factors relevant to the actions proposed or refused are:  
[ ]

**Implementation of Decision**

This decision is proposed to be implemented on: [ ]

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)  
[ ] (initials)

This document was prepared by:  
Admin User

Case Manager [ ] Case Manager Phone [ ]

**Figure 3-319 Notice of Placement (Preschool) Screen**

To create a Notice of Placement document:

1. Enter the **Document Date** (MMDDYY) or click and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

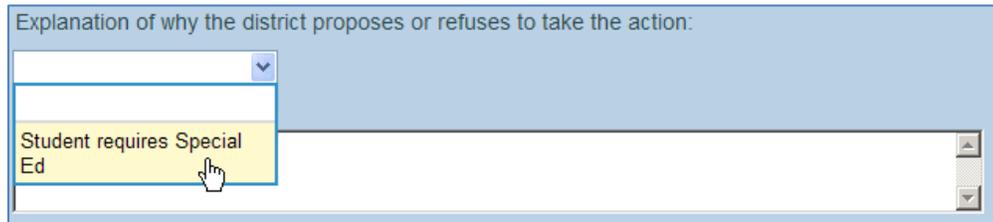


Figure 3-320 Notice of Placement (Preschool) Screen Statements Section Drop-down

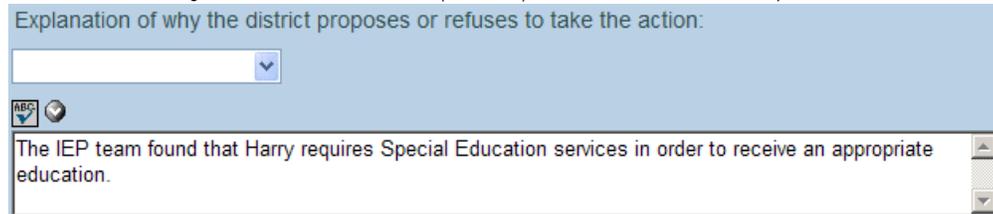


Figure 3-321 Notice of Placement (Preschool) Screen Statements Section Populated

2. Click on the drop-down box located above the textbox.
3. Select the desired key-word stem in the drop-down list.
4. The statement associated with the key-word stem selected will appear in the textbox. Use to spellcheck. Use for more space.
5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent.
7. Click next to **This document was prepared by:.** The Find: Staff screen displays.
8. Enter all or part of staff **Last Name, First Name.**

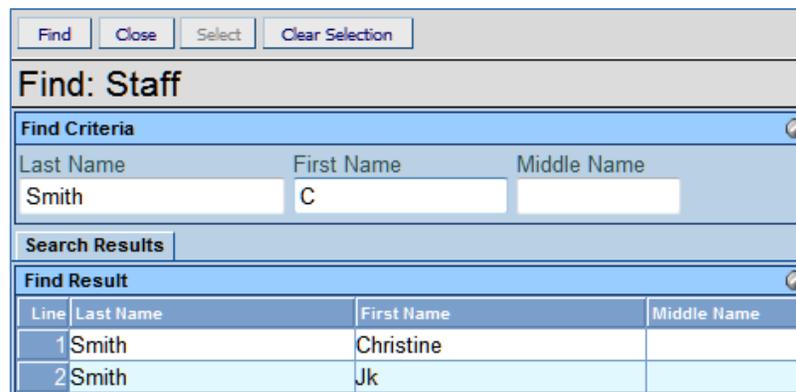


Figure 3-322 Find: Staff Screen

9. Click or press ENTER. Search Results displays a list of matching criteria.
10. Click line of staff name. Line highlights.
11. Click again or click . Find: Staff screen closes and staff name displays.
12. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 28 – NOTICE OF IEP (PRESCHOOL)

The Notice of IEP (Preschool) is located in the Preschool Process.



**Note:** The Notice of IEP (Preschool) has been created from the Prior Written Notice template in Synergy SE. The wording of the example below may differ as each school district has the ability to create and edit Prior Written Notices to meet their individual district needs.

The Notice of Notice of IEP (Preschool) contains one tab:

- **Prior Written Notice**

**Prior Written Notice**

Student Name: **Akins, Shawn E.** Document: **GENAZ 28** Description: **Notice of IEP**

Prior Written Notice

Document Name: **Notice of IEP** Document Date: [ ]

**Description of Actions Proposed or Refused**

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification  
The evaluation team has received a referral for a possible comprehensive evaluation of your child.

**Statements**

Explanation of why the district proposes or refuses to take the action:

[ ]

Description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action:

[ ]

Description of other options considered and why those options were rejected:

[ ]

Description of the factors relevant to the actions proposed or refused are:

[ ]

**Implementation of Decision**

This decision is proposed to be implemented on: [ ]

Parents of a student and the student have protection under procedural safeguards in accordance with Federal Law. Contact the school psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s)

[ ] (initials)

This document was prepared by:

Admin User

Case Manager [ ] Case Manager Phone [ ]

Figure 3-323 Notice of IEP (Preschool) Screen

To create a Notice of IEP document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.

The Statements section contains four description areas where explanations for actions taken are entered. Drop-down key-word stems may be available, based on individual district decisions. If no stems are available in the drop-downs, text can be added directly to the textboxes.

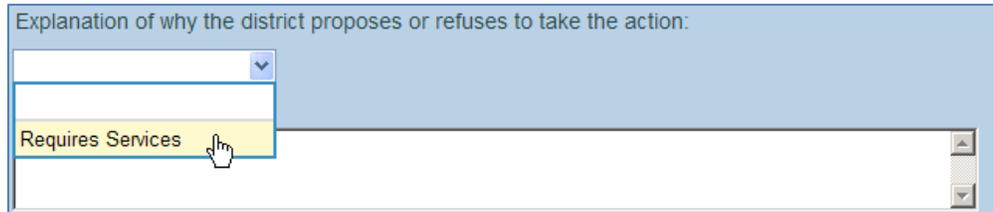


Figure 3-324 Notice of IEP (Preschool) Screen Statements Section Drop-down

2. Click on the drop-down box located above the textbox.

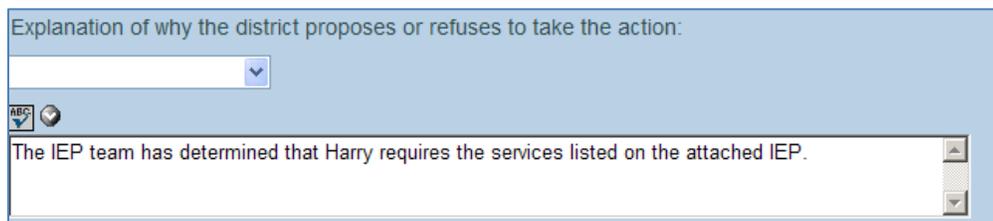


Figure 3-325 Notice of IEP (Preschool) Screen Statements Section Populated

3. Select the desired key-word stem in the drop-down list.
4. The statement associated with the key-word stem selected will appear in the textbox. Use  to spellcheck. Use  for more space.
5. The Implementation of Decision section contains a date field that reflects the implementation date. Enter the **date** (MMDDYY) or click  and select date.
6. Enter user (**initials**) to signify that Procedural Safeguards were provided to parent Click  next to **This document was prepared by:**. The Find: Staff screen displays.

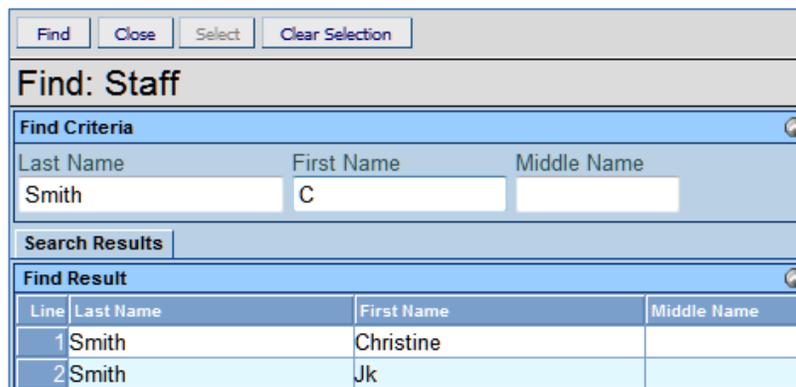


Figure 3-326 Find: Staff Screen

7. Enter all or part of staff Last Name, First Name.
8. Click  or press ENTER. Search Results displays a list of matching criteria.
9. Click line of staff name. Line highlights.
10. Click again or click . Find: Staff screen closes and staff name displays.
11. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## ELIGIBILITY DETERMINATION DOCUMENTS

The list of Eligibility Determination documents can be accessed by clicking on the “E” icon in the Initial, Reevaluation or Preschool Process.



**Note:** Eligibility Determination documents have been created from the Eligibility Determination Template in Synergy SE. The wording of the examples below may differ as each school district has the ability to create and edit these documents to meet their individual district needs.

GENAZ 56	Eligibility Determination	Autism
GENAZ 57	Eligibility Determination	Emotional Disability
GENAZ 58	Eligibility Determination	Hearing Impairment
GENAZ 59	Eligibility Determination	Intellectual Disability
GENAZ 60	Eligibility Determination	Multiple Disabilities / SSI
GENAZ 61	Eligibility Determination	Other Health Impairment
GENAZ 63	Eligibility Determination	Orthopedic Impairment
GENAZ 64A	Eligibility Determination	Developmental Delay
GENAZ 64	Eligibility Determination	Preschool Severe Delay
GENAZ 65	Eligibility Determination	Specific Learning Disability
GENAZ 66	Eligibility Determination	Speech/Language Impairment
GENAZ 67	Eligibility Determination	Traumatic Brain Injury
GENAZ 68	Eligibility Determination	Visual Impairment
GENAZ 69	Eligibility Determination	Non Eligible Child

## GENAZ 56 – ELIGIBILITY DETERMINATION - AUTISM

The Eligibility Determination – Autism contains one tab:

- **Eligibility Determination**

**Eligibility Determination**

Student Name: **Abbott, Billy C.** Document: **GENAZ 56** Description: **Eligibility Determination - Autism**

**Eligibility Determination**

Document Name: **Eligibility Determination - Autism** Document Date:

There has been a lack of instruction in reading and math

The student is limited English proficient

If either response is "Yes", provide an explanation:

A student being considered for eligibility for Special Education under the category of AUTISM DISABILITY must meet all of the following eligibility criteria, as indicated by a checkmark:

**Eligibility Criteria**

Evidence, by assessment team consensus, that the student meets the DSM-IV criteria for the presence of Autistic Disorder. (The team must complete the checklist on the back of this form.)

**Eligibility Criteria**

The student shows delays or abnormal functioning in at least ONE of the following areas, with onset generally prior to 3 years of age:

social interaction  
 language as used in social communication, or  
 symbolic or imaginative play

**Eligibility Criteria**

The symptoms have persisted more than 6 months.  
 The symptoms are to a degree to be developmentally deviant.  
 The symptoms meet criteria cross-situationally, as rated by at least 2 persons.  
 More than one instrument was used to make the diagnostic decision; and the assessment team feels confident regarding the validity and comprehensiveness of the assessment. Input from a medical doctor or appropriate clinician may be necessary.  
 Other diagnoses were considered and ruled out as a major factor in explaining current symptomatology. Symptoms are not considered better explained as part of another mental disorder.  
 The student's primary educational problems are not due to Emotional Disability.  
 The adverse effects of the impairment on educational performance are not correctable without Special Education.

**Eligibility Decision**

Decision:

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used)

Grades  Parent Report  Work Samples  
 School Records  Medical Reports  Psychoeducational Evaluations  
 Classroom Teacher(s) Report  Group Achievement Test  Individual Achievement Tests  
 Classroom Observations

Other:

IEP (Date):

Figure 3-327 Eligibility Determination - Autism Screen

To create an Eligibility Determination – Autism document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use  to spellcheck. Use  for more space.

The Eligibility Criteria contain checkboxes that determine if the student meets the criteria for eligibility.

- Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.

Figure 3-328 Eligibility Determination - Autism Screen Drop-down

- Check the Sources of Data Used to Make this Decision.
- Enter the current **IEP (Date)** (MMDDYY) or click and select date.
- Add any **Other** source of data used to make this decision that might apply.
- Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.

Figure 3-329 Eligibility Determination - Autism Screen Participants

- On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Figure 3-330 Eligibility Determination - Autism Screen Staff Section Change/Add

Change current staff names:

1. Click ← next to the **Staff Name** to change. The Find: Staff screen displays.

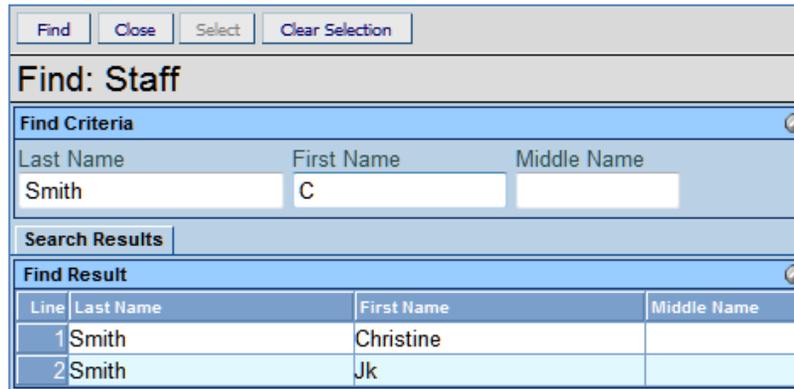


Figure 3-331 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.

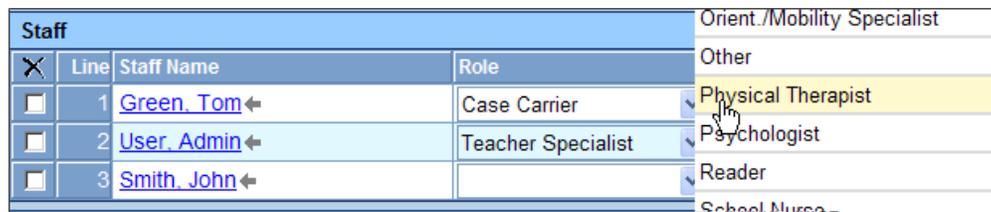


Figure 3-332 Eligibility Determination - Autism Screen Staff Section Role Selection

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.

The final section contains the DSM-IV Diagnostic Criteria for Autism Spectrum Disorder. Based on selections checked, the student is given a score that will provide an overview and explanation of the student's Autism eligibility.

DSM-IV Diagnostic Criteria	
DSM-IV Diagnostic Criteria for Autism Spectrum Disorder	
A. A total of SIX (or more) items from (1), (2), and (3), with at least two from (1), and one each from (2) and (3):	
DSM-IV Criteria	
(1) qualitative impairment in social interaction, as manifested by at least TWO of the following:	
<input type="checkbox"/> (a) marked impairment in the use of multiple non-verbal behaviors such as eye-to-eye gaze, facial expression, body postures, and gestures to regulate social interaction <input type="checkbox"/> (b) failure to develop peer relationships appropriate to developmental level <input type="checkbox"/> (c) a lack of spontaneous seeking to share enjoyment, interests, or achievements with other people (e.g., by a lack of showing, bringing, or pointing out objects of interest) <input type="checkbox"/> (d) lack of social or emotional reciprocity	
Total:	0
DSM-IV Criteria	
(2) qualitative impairments in communication as manifested by at least ONE of the following:	
<input type="checkbox"/> (a) delay in, or total lack of, the development of spoken language (not accompanied by an attempt to compensate through a native modes of communication such as gesture or mime) <input type="checkbox"/> (b) individuals with adequate speech, marked impairment in the ability to initiate or sustain a conversation with others <input type="checkbox"/> (c) stereotyped and repetitive use of language or idiosyncratic language <input type="checkbox"/> (d) lack of varied, spontaneous make-believe play or social imitative play appropriate to developmental level	
Total:	0
DSM-IV Criteria	
(3) restricted repetitive and stereotyped patterns of behavior, interests, and activities, as manifested by at least ONE of the following:	
<input type="checkbox"/> (a) encompassing preoccupation with one or more stereotyped and restricted patterns of interest that is abnormal either in intensity or focus <input type="checkbox"/> (b) apparently inflexible adherence to specific, non-functional routines or rituals <input type="checkbox"/> (c) stereotyped and repetitive motor mannerisms (e.g., hand or finger flapping or twisting, or complex whole-body movements) <input type="checkbox"/> (d) persistent preoccupation with parts of objects	
Total:	0
Grand Total:	0

Figure 3-333 Eligibility Determination - Autism Screen DSM-IV Diagnostic Criteria

1. Check the statements that apply. The Total box at the bottom, displays the amount of items selected.
2. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 57 – ELIGIBILITY DETERMINATION - EMOTIONAL DISABILITY

The Eligibility Determination - Emotional Disability contains one tab:

- **Eligibility Determination**

**Eligibility Determination**

Student Name: **Saager, Philip T.** Document: **GENAZ 57** Description: **Eligibility Determination - Emotional Disturbance**

**Eligibility Determination**

Document Name: **Eligibility Determination - Emotional Disturbance** Document Date: [ ]

There has been a lack of instruction in reading and math [ ]

The student is limited English proficient [ ]

If either response is "Yes", provide an explanation: [ ]

A student being considered for eligibility for Special Education under the category of **EMOTIONAL DISABILITY** must show evidence of an emotional condition/disorder, whereby the child exhibits one or more of the following characteristics, as indicated by a checkmark:

**Eligibility Criteria**

- An inability to learn which cannot be explained by intellectual, sensory or health factors.
- An inability to build and maintain satisfactory interpersonal relationships with peers and teachers.
- Inappropriate types of behavior or feelings under normal circumstances.
- A general pervasive mood of unhappiness or depression.
- A tendency to develop physical symptoms associated with personal or school problems.
- Emotional disorder will include children who are diagnosed with Schizophrenia.

**Eligibility Criteria**

This student must also meet all of the following criteria:

- Verification of an emotional condition/disorder by a psychiatrist, licensed psychologist, or a certified school psychologist.
- The above condition(s) is/are not caused by social maladjustment.
- The condition has existed for a long period of time.
- The condition adversely affects the child's educational performance.
- The adverse effects of the condition on educational performance are not correctable without Special Education.

**Eligibility Decision**

Decision: [ ]

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used)

- Grades
- Parent Report
- Work Samples
- School Records
- Medical Reports
- Psychoeducational Evaluations
- Classroom Teacher(s) Report
- Group Achievement Test
- Individual Achievement Tests
- Classroom Observations

Other [ ]

IEP (Date): [ ]

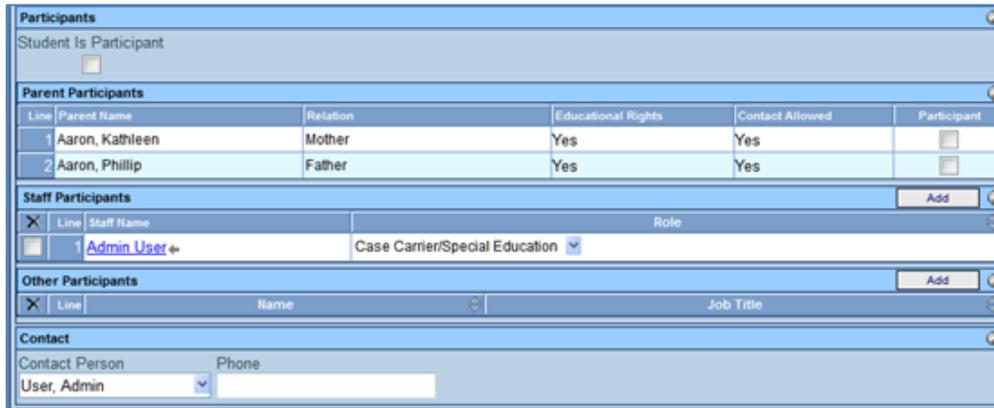
Figure 3-334 Eligibility Determination - Emotional Disability Screen

To create an Eligibility Determination - Emotional Disability document:

1. Enter the **Document Date** (MMDDYY) or click [ ] and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use [ ] to spellcheck. Use [ ] for more space.

The Eligibility Criteria sections contain checkboxes that determine if the student meets the criteria for eligibility.

4. Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.
5. Check the Sources of Data Used to Make this Decision.
6. Enter the **current IEP (Date)** (MMDDYY) or click  and select date.
7. Add any **Other** source of data used to make this decision that might apply.



Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>

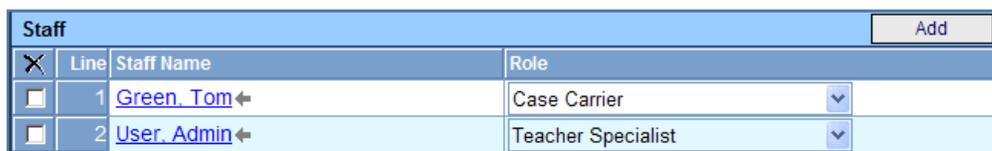
  

Line	Staff Name	Role
1	Admin User	Case Carrier/Special Education

Figure 3-335 Eligibility Determination - Emotional Disability Screen Participants

8. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
9. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.



Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist

Figure 3-336 Eligibility Determination - Emotional Disability Screen Staff Role Selection

Change current staff names:

1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.

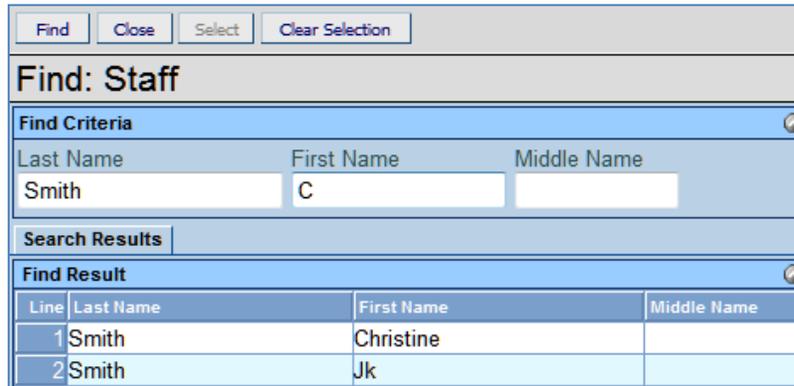


Figure 3-337 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.

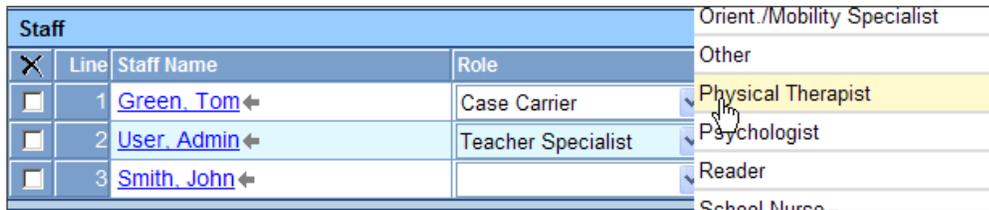


Figure 3-338 Eligibility Determination - Emotional Disability Screen Staff Section Role Selection

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.
6. Click .
7. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 58 – ELIGIBILITY DETERMINATION - HEARING IMPAIRMENT

The Eligibility Determination – Hearing Impairment contains one tab:

- **Eligibility Determination**

Eligibility Determination

Student Name: Abbott, Billy C. Document: GENAZ 58 Description: Eligibility Determination - Hearing Impairment

Eligibility Determination

Document Name: Eligibility Determination - Hearing Impairment Document Date: [Date Picker]

There has been a lack of instruction in reading and math [Dropdown]

The student is limited English proficient [Dropdown]

If either response is "Yes", provide an explanation: [Text Area]

Determination of a HEARING IMPAIRMENT is based upon the student meeting all of the following eligibility criteria, as indicated by a checkmark:

**Eligibility Criteria**

Current audiological report indicating a loss of hearing acuity (within one year).

The impairment adversely affects the child's educational performance, as determined by an evaluation of communication/language proficiency.

The adverse effects of the impairment, on educational performance, are not correctable without Special Education.

**Eligibility Decision**

Decision: [Dropdown]

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used)

Grades  Parent Report  Work Samples  IEP (Date) [Date Picker]

School Records  Medical Reports  Psychoeducational Evaluations

Classroom Teacher(s) Report  Group Achievement Test  Individual Achievement Tests

Classroom Observations

Other [Text Area]

**Participants**

Student Is Participant

**Parent Participants**

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>

**Staff Participants** [Add]

Line	Staff Name	Role
1	Admin User	Case Carrier/Special Education

**Other Participants** [Add]

Line	Name	Job Title
------	------	-----------

**Contact**

Contact Person: User, Admin Phone: [Text Field]

Figure 3-339 Eligibility Determination - Hearing Impairment Screen

To create an Eligibility Determination – Hearing Impairment document:

1. Enter the **Document Date** (MMDDYY) or click [Date Picker] and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use [Spellcheck] to spellcheck. Use [More] for more space.

The Eligibility Criteria sections contain checkboxes that determine if the student meets the criteria for eligibility.

4. Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.
5. Check the Sources of Data Used to Make this Decision.
6. Enter the **current IEP (Date)** (MMDDYY) or click  and select date.
7. Add any **Other** source of data used to make this decision that might apply.

Participants					
Student Is Participant					
<input type="checkbox"/>					
Parent Participants					
Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>
Staff Participants					
X	Line	Staff Name	Role		
<input type="checkbox"/>	1	Admin User	Case Carrier/Special Education		
Other Participants					
X	Line	Name	Job Title		
Contact					
Contact Person		Phone			
User, Admin					

Figure 3-340 Eligibility Determination - Hearing Impairment Screen Participants

8. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
9. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

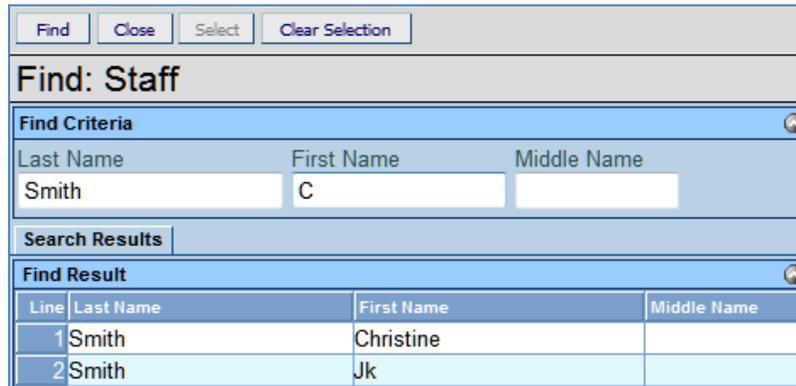
The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Staff			
X	Line	Staff Name	Role
<input type="checkbox"/>	1	Green, Tom	Case Carrier
<input type="checkbox"/>	2	User, Admin	Teacher Specialist

Figure 3-341 Eligibility Determination - Hearing Impairment Screen Staff Role Selection

Change current staff names:

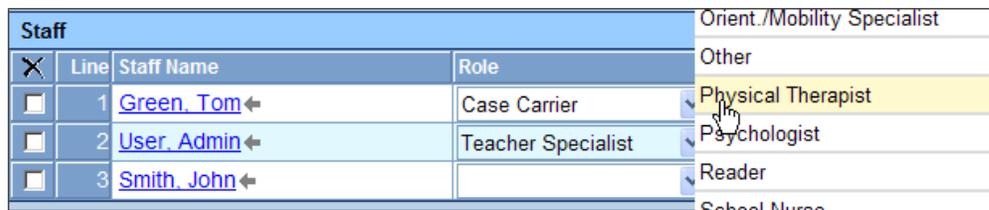
1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.



Find: Staff			
Find Criteria			
Last Name	First Name	Middle Name	
Smith	C		
Search Results			
Find Result			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-342 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.



Line	Staff Name	Role	
1	<a href="#">Green, Tom</a>	Case Carrier	Physical Therapist
2	<a href="#">User, Admin</a>	Teacher Specialist	Psychologist
3	<a href="#">Smith, John</a>		Reader

Figure 3-343 Eligibility Determination - Hearing Impairment Screen Staff Section Role Selection

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.
6. Click .
7. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 59 – ELIGIBILITY DETERMINATION - INTELLECTUAL DISABILITY

The Eligibility Determination – Intellectual Disability contains one tab:

- **Eligibility Determination**

**Eligibility Determination**

Student Name: **Sabin, Heather R.** Document: GENAZ 59 Description: Eligibility Determination - Intellectual Disability

**Eligibility Determination**

Document Name: Eligibility Determination - Intellectual Disability Document Date:

There has been a lack of instruction in reading and math

The student is limited English proficient

If either response is "Yes", provide an explanation:

In determining the presence of a MENTAL DISABILITY, or continued presence of a MENTAL DISABILITY for the above named student, one of the following eligibility criteria must be met, as indicated by a checkmark:

**Eligibility Criteria**

Disability Classification:

**Eligibility Criteria**

The significant impairment of general intellectual functioning adversely affects the student's performance in the educational environment, such that the student requires Special Education, or continues to require Special Education and related services.

**Eligibility Decision**

Decision:

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used) IEP (Date)

Grades  Parent Report  Work Samples  
 School Records  Medical Reports  Psychoeducational Evaluations  
 Classroom Teacher(s) Report  Group Achievement Test  Individual Achievement Tests  
 Classroom Observations

Other:

**Participants**

Student Is Participant:

**Parent Participants**

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Sabin, Brian	Father	Yes	Yes	<input type="checkbox"/>
2	Sabin, Judith	Mother	Yes	Yes	<input type="checkbox"/>

**Staff Participants** Add

Line	Staff Name	Role
1	Cissy Horn	Special Ed Teacher
2	Admin User	Case Carrier/Special Education

**Other Participants** Add

Line	Name	Job Title
------	------	-----------

**Contact**

Contact Person: User, Admin Phone:

Figure 3-344 Eligibility Determination - Intellectual Disability Screen

To create an Eligibility Determination – Intellectual Disability document:

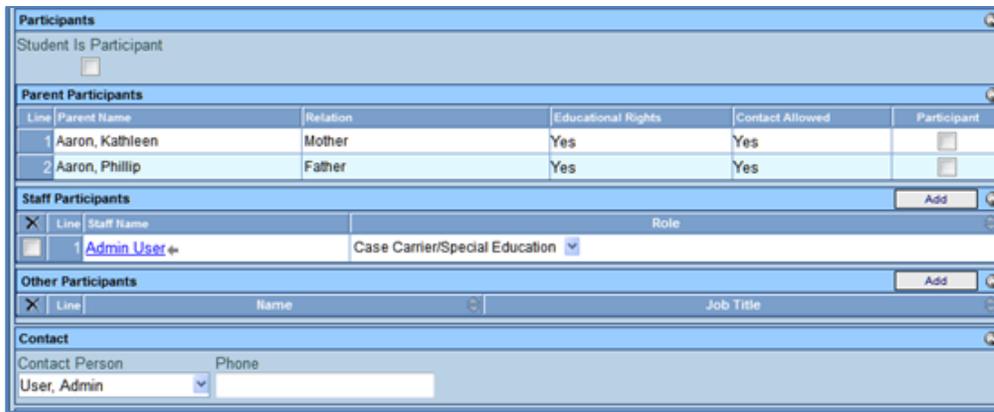
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1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use  to spellcheck. Use  for more space.

The Eligibility Criteria sections contain checkboxes that determine if the student meets the criteria for eligibility.

4. Click Disability drop-down and make appropriate selection.
5. Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.
6. Check the Sources of Data Used to Make this Decision.
7. Enter the **current IEP (Date)** (MMDDYY) or click  and select date.
8. Add any **Other** source of data used to make this decision that might apply.



Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>

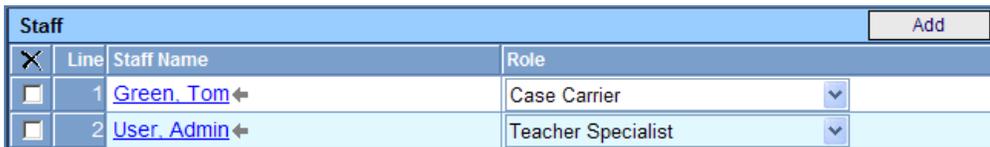
  

Line	Staff Name	Role
1	Admin User	Case Carrier/Special Education

Figure 3-345 Eligibility Determination - Intellectual Disability Screen Participants

9. Check Student to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
10. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

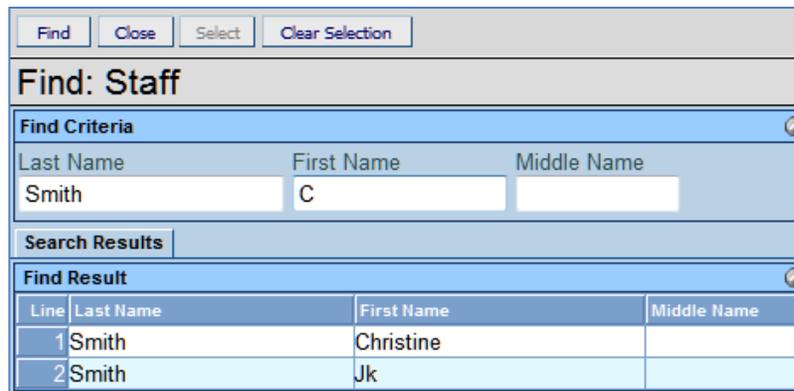


Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist

Figure 3-346 Eligibility Determination - Intellectual Disability Screen Staff Role Selection

Change current staff names:

1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.



Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-347 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.

Staff	Line	Staff Name	Role
<input type="checkbox"/>	1	<a href="#">Green, Tom</a> 	Case Carrier
<input type="checkbox"/>	2	<a href="#">User, Admin</a> 	Teacher Specialist
<input type="checkbox"/>	3	<a href="#">Smith, John</a> 	

Figure 3-348 Eligibility Determination - Intellectual Disability Screen Staff Section Role Selection

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.
6. Click .
7. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 60 – ELIGIBILITY DETERMINATION - MULTIPLE DISABILITIES / SSI

The Eligibility Determination - Multiple Disabilities / SSI contains one tab:

- **Eligibility Determination**

**Eligibility Determination**

Student Name: **Cooper, Jake D.** Document: GENAZ 60 Description: Eligibility Determination - Multiple Disabilities / SSI

**Eligibility Determination**

Document Name: Eligibility Determination - Multiple Disabilities / SSI Document Date:

There has been a lack of instruction in reading and math

The student is limited English proficient

If either response is "Yes", provide an explanation:

A student being considered for eligibility for Special Education under the category of MULTIPLE DISABILITIES must meet eligibility criteria under two or more of the following conditions, as indicated by a checkmark:

**Eligibility Criteria**

- Hearing Impairment (HI)
- Moderate Intellectual Disability (MOID)
- Orthopedic Impairment (OI)
- Visual Impairment (VI)

**Eligibility Criteria**

OR: A child with one disability listed above is also a child with at least one concurrently existing condition of:

- Mild Intellectual Disability (MID),
- Emotional Disability (ED), or
- Specific Learning Disability (SLD).

**Eligibility Criteria**

A student being considered for Special Education under the category of MD/SEVERE SENSORY IMPAIRMENT must meet eligibility criteria under MULTIPLE DISABILITIES and under ONE of the following:

- Severe Visual Impairment or Hearing Impairment in combination with another severe disability (MD, MID, OI, A, SID, ED requiring private or public intensive therapeutic placement); or
- Severe Visual Impairment and Severe Hearing Impairment.

**Eligibility Criteria**

The student must also meet all of the following criteria:

- Medical verification, as required for VI, HI, TBI, or OI.
- The impairment adversely affects the child's educational performance.
- The adverse effects of the impairment on educational performance are not correctable without Special Education.

**Eligibility Decision**

Decision:

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used)

<input type="checkbox"/> Grades	<input type="checkbox"/> Parent Report	<input type="checkbox"/> Work Samples
<input type="checkbox"/> School Records	<input type="checkbox"/> Medical Reports	<input type="checkbox"/> Psychoeducational Evaluations
<input type="checkbox"/> Classroom Teacher(s) Report	<input type="checkbox"/> Group Achievement Test	<input type="checkbox"/> Individual Achievement Tests
<input type="checkbox"/> Classroom Observations	<input type="checkbox"/> Speech/Language Evaluation	

IEP (Date)

Other

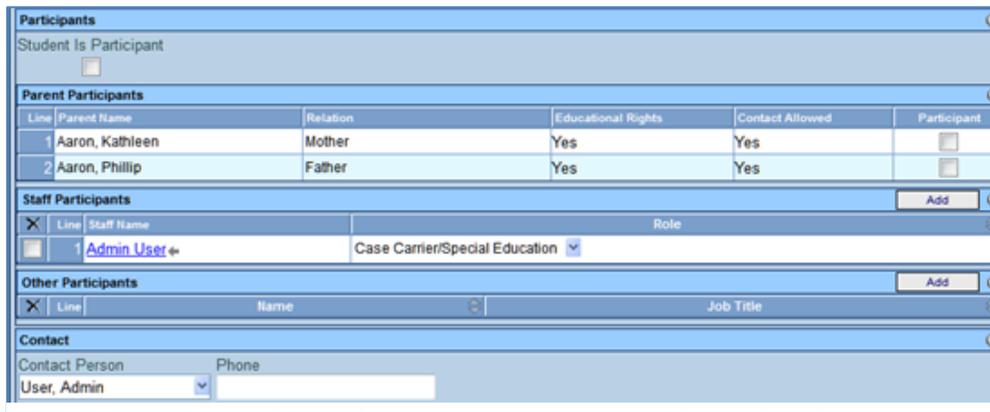
Figure 3-349 Eligibility Determination - Multiple Disabilities / SSI Screen

To create an Eligibility Determination - Multiple Disabilities / SSI document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use  to spellcheck. Use  for more space.

The Eligibility Criteria sections contain checkboxes that determine if the student meets the criteria for eligibility.

4. Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.
5. Check the Sources of Data Used to Make this Decision.
6. Enter the **current IEP (Date)** (MMDDYY) or click  and select date.
7. Add any **Other** source of data used to make this decision that might apply.



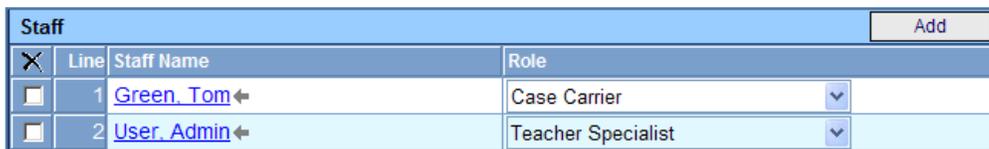
Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>

Line	Staff Name	Role
1	Admin User	Case Carrier/Special Education

Figure 3-350 Eligibility Determination - Multiple Disabilities / SSI Screen Participants

8. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
9. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

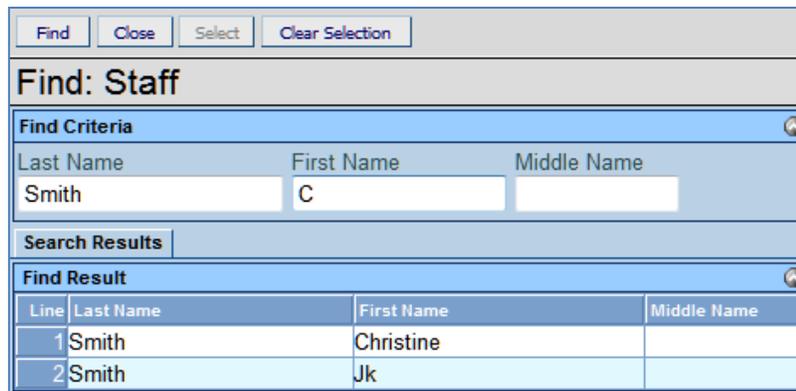


Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User Admin	Teacher Specialist

Figure 3-351 Eligibility Determination - Multiple Disabilities / SSI Screen Staff Role Selection

Change current staff names:

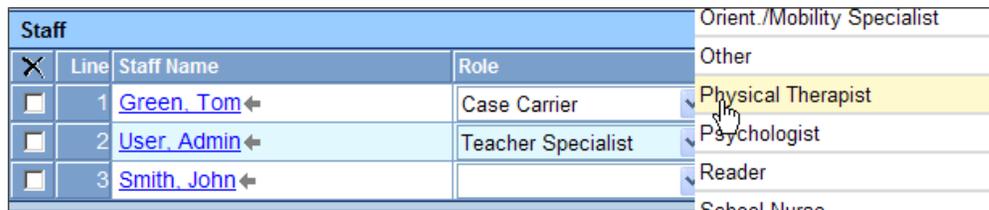
1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.



Find: Staff			
Find Criteria			
Last Name	First Name	Middle Name	
Smith	C		
Search Results			
Find Result			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-352 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.



Staff	Role
1 Green, Tom	Case Carrier
2 User, Admin	Teacher Specialist
3 Smith, John	

- Orient./Mobility Specialist
- Other
- Physical Therapist
- Psychologist
- Reader
- School Nurse

Figure 3-353 Eligibility Determination - Multiple Disabilities / SSI Screen Staff Section Role Selection

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.
6. Click .
7. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 61 – ELIGIBILITY DETERMINATION - OTHER HEALTH IMPAIRMENT

The Eligibility Determination – Other Health Impairment contains one tab:

- **Eligibility Determination**

**Eligibility Determination**

Student Name: **Abbott, Billy C.** Document: **GENAZ 61** Description: **Eligibility Determination - Other Health Impairment**

**Eligibility Determination**

Document Name: **Eligibility Determination - Other Health Impairment** Document Date:

There has been a lack of instruction in reading and math

The student is limited English proficient

If either response is "Yes", provide an explanation:

A student being considered for eligibility for Special Education under the category of OTHER HEALTH IMPAIRMENT must meet all of the following eligibility criteria, as indicated by a checkmark:

**Eligibility Criteria**

The health impairment is documented by a doctor of medicine.

**Eligibility Criteria**

Chronic or acute diagnosis of (enter description above) causes one or more of the following:

limited strength

limited vitality

limited alertness

**Eligibility Criteria**

The impairment adversely affects the child's educational performance.

The adverse effects of the impairment on educational performance are not correctable without Special Education.

**Eligibility Decision**

Decision:

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used)

Grades  Parent Report  Work Samples

School Records  Medical Reports  Psychoeducational Evaluations

Classroom Teacher(s) Report  Group Achievement Test  Individual Achievement Tests

Classroom Observations

Other:

IEP (Date):

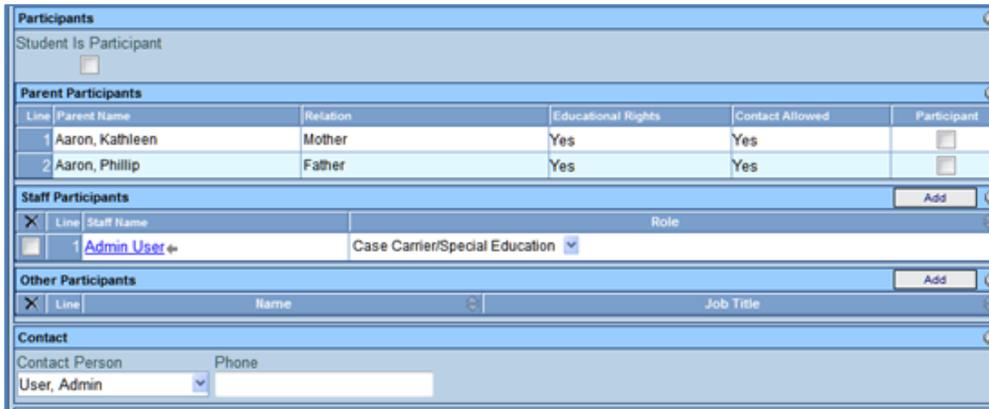
Figure 3-354 Eligibility Determination - Other Health Impairment Screen

To create an Eligibility Determination – Other Health Impairment document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use  to spellcheck. Use  for more space.

The Eligibility Criteria sections contain checkboxes that determine if the student meets the criteria for eligibility.

4. Check the box if this health impairment is documented by a doctor of medicine.
5. Enter the description in the textbox of the chronic or acute diagnosis which cause the following items (on the screen).
6. Based on the criteria selected, indicate the decision of whether the student **is or is not** eligible using the drop-down selection.
7. Check the Sources of Data Used to Make this Decision.
8. Enter the current **IEP (Date)** (MMDDYY) or click  and select date.
9. Add any **Other** source of data used to make this decision that might apply.



Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>

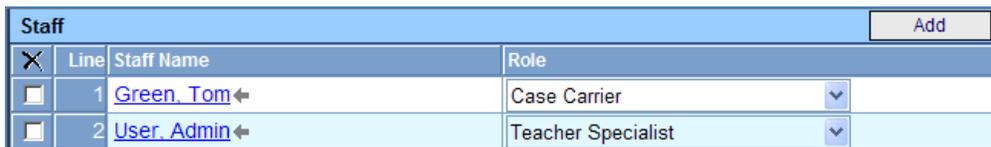
  

Line	Staff Name	Role
1	Admin User	Case Carrier/Special Education

Figure 3-355 Eligibility Determination - Other Health Impairment Screen Participants

10. Check Student to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
11. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.



Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist

Figure 3-356 Eligibility Determination - Other Health Impairment Screen Staff Role Selection

Change current staff names:

1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-357 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press ENTER. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.

Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist
3	Smith, John	Reader

Figure 3-358 Eligibility Determination - Other Health Impairment Screen Staff Section Role Selection

6. Click the **Role** drop-down

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.
6. Click .
7. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 63 – ELIGIBILITY DETERMINATION - ORTHOPEDIC IMPAIRMENT

The Eligibility Determination – Orthopedic Impairment contains one tab:

- **Eligibility Determination**

Student Name: Sabin, Heather R. Document: GENAZ 63 Description: Eligibility Determination - Orthopedic Impairment

**Eligibility Determination**

Document Name: Eligibility Determination - Orthopedic Impairment Document Date: [Date Picker]

There has been a lack of instruction in reading and math [Dropdown]

The student is limited English proficient [Dropdown]

If either response is "Yes", provide an explanation: [Text Area]

Determination of ORTHOPEDIC IMPAIRMENT is based upon the student meeting all of the following eligibility criteria, as indicated by a checkmark:

**Eligibility Criteria**

- The student has an impairment caused by congenital anomaly, disease, or other causes such as cerebral palsy, amputations, burns, etc.
- The student has an ORTHOPEDIC IMPAIRMENT. The physical disability is documented by a doctor of medicine.
- The impairment adversely affects the child's educational performance.
- The adverse effects of the impairment on educational performance are not correctable without Special Education.

**Eligibility Decision**

Decision: [Dropdown]

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used)

- Grades  Parent Report  Work Samples
- School Records  Medical Reports  Psychoeducational Evaluations
- Classroom Teacher(s) Report  Group Achievement Test  Individual Achievement Tests
- Classroom Observations

Other [Text Area]

**Participants**

Student Is Participant

**Parent Participants**

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Sabin, Brian	Father	Yes	Yes	<input type="checkbox"/>
2	Sabin, Judith	Mother	Yes	Yes	<input type="checkbox"/>

**Staff Participants**

Line	Staff Name	Role
1	Admin User	Case Carrier/Special Education
2	Cissy Horn	Special Ed Teacher

**Other Participants**

Line	Name	Job Title
------	------	-----------

**Contact**

Contact Person: User, Admin Phone: [Text Field]

Figure 3-359 Eligibility Determination - Orthopedic Impairment Screen

To create an Eligibility Determination - Orthopedic Impairment document:

1. Enter the **Document Date** (MMDDYY) or click [Date Picker] and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use [Spellcheck] to spellcheck. Use [Expand] for more space.

The Eligibility Criteria contain checkboxes that determine if the student meets the criteria for eligibility.

Figure 3-360 Eligibility Determination - Orthopedic Impairment Screen Eligibility Decision Drop-down

4. Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.
5. Check the Sources of Data Used to Make this Decision.
6. Enter the **current IEP (Date)** (MMDDYY) or click  and select date.
7. Add any **Other** source of data used to make this decision that might apply.

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>

Figure 3-361 Eligibility Determination - Orthopedic Impairment Screen Participants

8. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
9. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

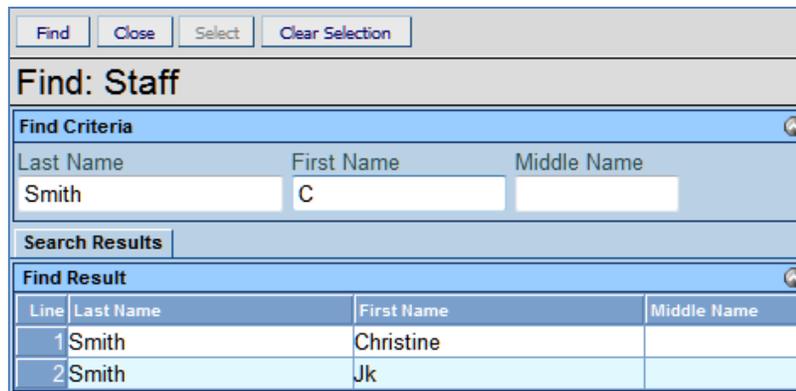
The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist

Figure 3-362 Eligibility Determination - Orthopedic Impairment Screen Staff Section Change/Add

Change current staff names:

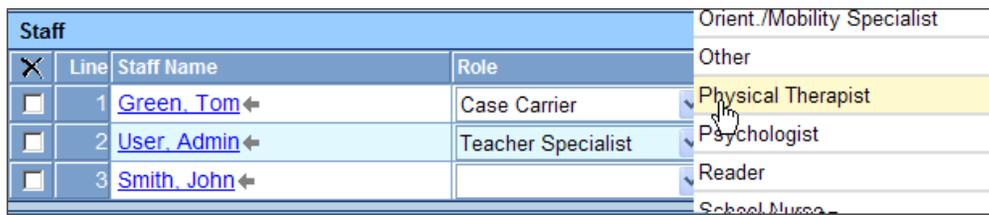
1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.



Find: Staff			
Find Criteria			
Last Name	First Name	Middle Name	
Smith	C		
Search Results			
Find Result			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-363 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press ENTER. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.



Staff	Line	Staff Name	Role
<input type="checkbox"/>	1	<a href="#">Green, Tom</a>	Case Carrier
<input type="checkbox"/>	2	<a href="#">User, Admin</a>	Teacher Specialist
<input type="checkbox"/>	3	<a href="#">Smith, John</a>	

- Orient./Mobility Specialist
- Other
- Physical Therapist
- Psychologist
- Reader
- School Nurse

Figure 3-364 Eligibility Determination - Orthopedic Impairment Screen Staff Section Select Role

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.
6. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 64A – ELIGIBILITY DETERMINATION - DEVELOPMENTAL DELAY

The Eligibility Determination – Developmental Delay contains one tab:

- **Eligibility Determination**

Student Name: **Cooper, Jake D.** Document: GENAZ 64A Description: Eligibility Determination - Developmental Delay

**Eligibility Determination**

Document Name: Eligibility Determination - Developmental Delay Document Date: [Date Picker]

There has been a lack of instruction in reading and math [Dropdown]  
 The student is limited English proficient [Dropdown]  
 If either response is "Yes", provide an explanation: [Text Area]

A child with a DEVELOPMENTAL DELAY meets eligibility for Special Education under one of the following categories, as indicated by a checkmark:

**Eligibility Criteria**

The child is at least three years of age but less than ten years of age.

**Eligibility Criteria**

Performance on a norm-referenced test measures at least 1.5 but not more than 3.0 standard deviations below the mean for children of the same age in two or more of the following areas:

Cognitive development  
 Social and emotional development  
 Physical development  
 Adaptive development  
 Communication development

**Eligibility Criteria**

The results of the norm-referenced measure(s) are corroborated by information from other sources including parent input, judgment-based assessments and/or surveys.

**Eligibility Criteria**

The child was evaluated in all of the areas of development listed above, which, taken together, comprise a comprehensive developmental assessment.

**Eligibility Criteria**

Parent has been provided with a written notice (PWN) regarding this decision that meets the requirement under the IDEA.

**Eligibility Decision**

Decision: [Dropdown]

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used)

Grades  Parent Report  Work Samples  
 School Records  Medical Reports  Psychoeducational Evaluations  
 Classroom Teacher(s) Report  Group Achievement Test  Individual Achievement Tests  
 Classroom Observations  Speech/Language Evaluation

IEP (Date): [Date Picker]  
 Other: [Text Area]

**Participants**

Student Is Participant:

**Parent Participants**

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Cooper, Dan	Father	Yes	Yes	<input type="checkbox"/>
2	Cooper, Debra	Mother	Yes	Yes	<input type="checkbox"/>

**Staff Participants** [Add]

Line	Staff Name	Role
1	Admin User	Case Manager

**Other Participants** [Add]

Line	Name	Job Title
------	------	-----------

**Contact**

Contact Person: User, Admin Phone: [Text Field]

Figure 3-365 Eligibility Determination - Developmental Delay Screen

To create an Eligibility Determination – Developmental Delay document:

1. Enter the **Document Date** (MMDDYY) or click [Date Picker] and select date. This should reflect the date the document was created.

2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use  to spellcheck. Use  for more space.

The Eligibility Criteria contain checkboxes that determine if the student meets the criteria for eligibility.

Figure 3-366 Eligibility Determination - Developmental Delay Screen Eligibility Decision Drop-down

4. Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.
5. Check the Sources of Data Used to Make this Decision
6. Enter the **current IEP (Date)** (MMDDYY) or click  and select date.
7. Add any **Other** source of data used to make this decision that might apply.

Figure 3-367 Eligibility Determination - Developmental Delay Screen Participants

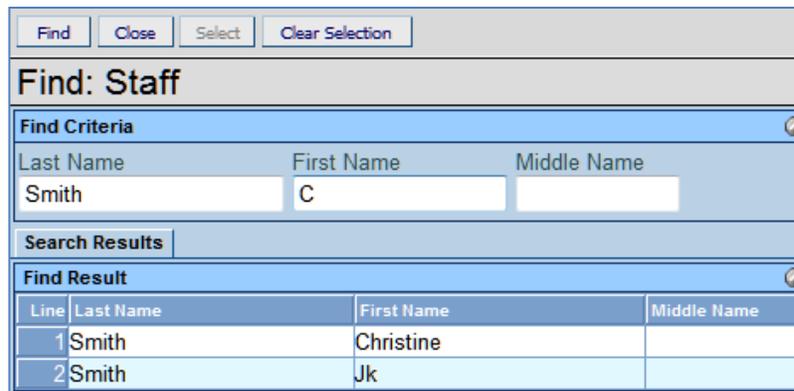
8. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
9. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Figure 3-368 Eligibility Determination – Developmental Delay Screen Staff Section Change/Add

Change current staff names:

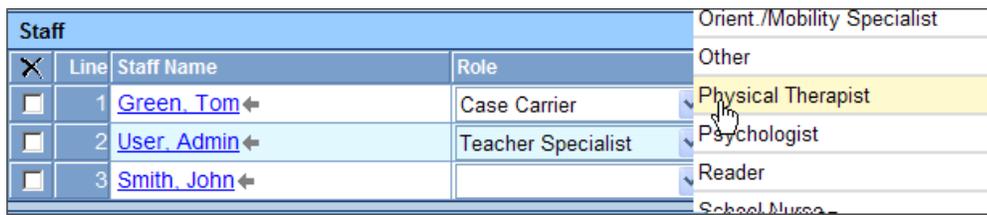
1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.



Find: Staff			
Find Criteria			
Last Name	First Name	Middle Name	
Smith	C		
Search Results			
Find Result			
Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-369 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press ENTER. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.



Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist
3	Smith, John	

Figure 3-370 Eligibility Determination - Developmental Delay Screen Staff Section Select Role

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.
6. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 64 – ELIGIBILITY DETERMINATION - PRESCHOOL SEVERE DELAY

The Eligibility Determination - Preschool Severe Delay contains one tab:

- **Eligibility Determination**

**Eligibility Determination**

Student Name: **Cooper, Jake D.** Document: **GENAZ 64** Description: **Eligibility Determination - Preschool Severe Delay**

**Eligibility Determination**

Document Name: Eligibility Determination - Preschool Severe Delay Document Date: [Date Picker]

There has been a lack of instruction in reading and math [Dropdown]

The student is limited English proficient [Dropdown]

If either response is "Yes", provide an explanation: [Text Area]

A SEVERELY DEVELOPMENTALLY DELAYED child means a child who meets eligibility for Special Education under one of the following categories, as indicated by a checkmark.

**Eligibility Criteria**

Preschool Severe Delay (PSD) means performance on a norm-referenced test that measures more than three standard deviations below the mean for children of the same chronological age in ONE or more area.

**Eligibility Criteria**

Significant delay is demonstrated in the following area(s):

Cognitive development  
 Social or emotional development  
 Physical development  
 Adaptive development  
 Communication development

**Eligibility Criteria**

Delay is NOT due to limited English proficiency.

**Eligibility Criteria**

Child must exhibit both of the following:

The impairment adversely affects the child's education performance.  
 The adverse effects on educational performance are not correctable without Special Education.

**Special Rule**

The results of the norm-referenced measure must be corroborated by information from comprehensive developmental assessment and from parental input, if available. If there is a discrepancy between the measures, the evaluation team shall determine eligibility based upon a preponderance of the information presented.

**Eligibility Decision**

Decision: [Dropdown]

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used)

Grades  Parent Report  Work Samples  
 School Records  Medical Reports  Psychoeducational Evaluations  
 Classroom Teacher(s) Report  Group Achievement Test  Individual Achievement Tests  
 Classroom Observations  Speech/Language Evaluation

IEP (Date): [Date Picker]

Other: [Text Area]

Figure 3-371 Eligibility Determination - Preschool Severe Delay Screen

To create an Eligibility Determination - Preschool Severe Delay document:

1. Enter the **Document Date** (MMDDYY) or click [Date Picker] and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use [Spellcheck] to spellcheck. Use [More] for more space.

The Eligibility Criteria contain checkboxes that determine if the student meets the criteria for eligibility.

- Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.

Figure 3-372 Eligibility Determination - Preschool Severe Delay Screen Eligibility Decision Drop-down

- Check the Sources of Data Used to Make this Decision.
- Enter the **current IEP (Date)** (MMDDYY) or click and select date.
- Add any **Other** source of data used to make this decision that might apply. the MET

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>

Figure 3-373 Eligibility Determination - Preschool Severe Delay Screen Participants

conference. If the checkbox is left blank the name will not be included as a participant.

- On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student’s Team List. Names can be added or removed from the staff section of this document without affecting the student’s Team List. If a Staff name is added to this document, the name will display on this document only and not on the student’s Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist

Figure 3-374 Eligibility Determination - Preschool Severe Delay Screen Staff Section Change/Add

Change current staff names:

- Click next to the **Staff Name** to change. The Find: Staff screen displays.

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-375 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press ENTER. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.

Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist
3	Smith, John	

Figure 3-376 Eligibility Determination - Preschool Severe Delay Screen Staff Section Select Role

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.
6. Click .

The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 65 – ELIGIBILITY DETERMINATION - SPECIFIC LEARNING DISABILITY

The Eligibility Determination - Specific Learning Disability contains one tab:

- **Eligibility Determination**

**Eligibility Determination**

Student Name: **Abbott, Billy C.** Document: **GENAZ 65** Description: **Eligibility Determination - Specific Learning Disability**

**Eligibility Determination**

Document Name: **Eligibility Determination - Specific Learning Disability** Document Date:

The student is limited English proficient:

If either response is "Yes", provide an explanation:

A student being considered for eligibility for Special Education under the category of SPECIFIC LEARNING DISABILITY must meet all of the following criteria, as indicated by a checkmark:

**Eligibility Criteria**

The student continues to have significant difficulty progressing in the regular curriculum, despite structured interventions over time.

There is a significant discrepancy between intellectual ability and achievement in one or more of the following areas:

**Eligibility Criteria**

Area of Qualification

Basic Reading Skill

Written Expression

Reading Comprehension

Oral Expression

Mathematics Calculation

Listening Comprehension

Mathematics Reasoning

Reading Fluency

**Eligibility Criteria**

Characteristics of an information processing disorder are documented on the Information Processing Worksheet & have been discussed.

**Eligibility Criteria**

The multidisciplinary evaluation team has determined that the discrepancy:

Is not primarily the result of a visual, hearing, or motor disability, mental retardation, emotional disturbance, environmental, cultural, or economic disadvantage.

Is not primarily the result of limited English proficiency, or

Is not primarily the result of a lack of instruction in reading or math.

**Eligibility Criteria**

The impairment adversely affects the child's educational performance.

The adverse effects of the impairment on educational performance are not correctable without Special Education.

**Eligibility Decision**

Decision:

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used)

Grades  Parent Report  Work Samples

School Records  Medical Reports  Psychoeducational Evaluations

Classroom Teacher(s) Report  Group Achievement Test  Individual Achievement Tests

Classroom Observations

Other:

IEP (Date):

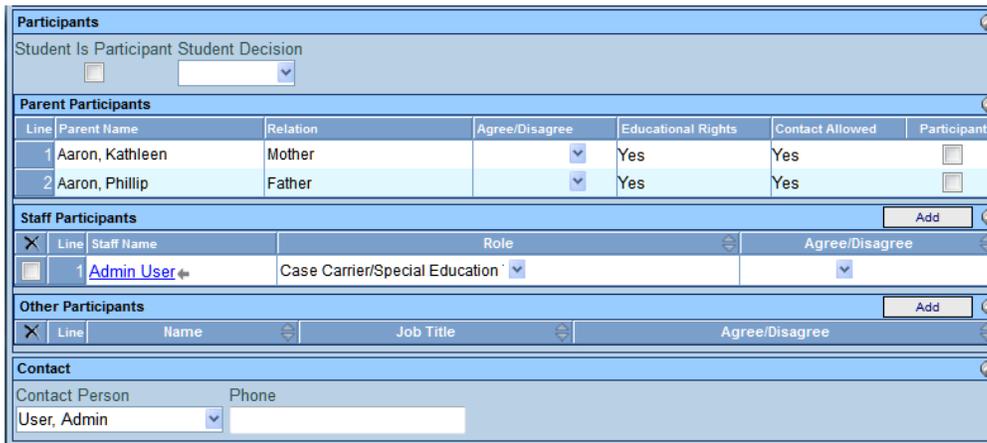
Figure 3-377 Eligibility Determination - Specific Learning Disability Screen

To create an Eligibility Determination - Specific Learning Disability document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use  to spellcheck. Use  for more space.

The Eligibility Criteria sections contain checkboxes that determine if the student meets the criteria for eligibility.

4. Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.
5. Check the Sources of Data Used to Make this Decision.
6. Enter the current **IEP (Date)** (MMDDYY) or click  and select date.



Line	Parent Name	Relation	Agree/Disagree	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	▼	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	▼	Yes	Yes	<input type="checkbox"/>

Line	Staff Name	Role	Agree/Disagree
1	Admin User	Case Carrier/Special Education	▼

Line	Name	Job Title	Agree/Disagree
------	------	-----------	----------------

Contact Person: User, Admin  
Phone:

Figure 3-378 Eligibility Determination - Specific Learning Disability Screen Participants

7. Add any **Other** source of data used to make this decision that might apply.
8. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
9. Click the **Student Decision** drop-down and select whether the student **Agrees** or **Disagrees** with this eligibility determination.
10. Repeat this step for each parent participant, using the drop-down under the **Agree/Disagree** column.
11. Check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Change current staff names:

1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.

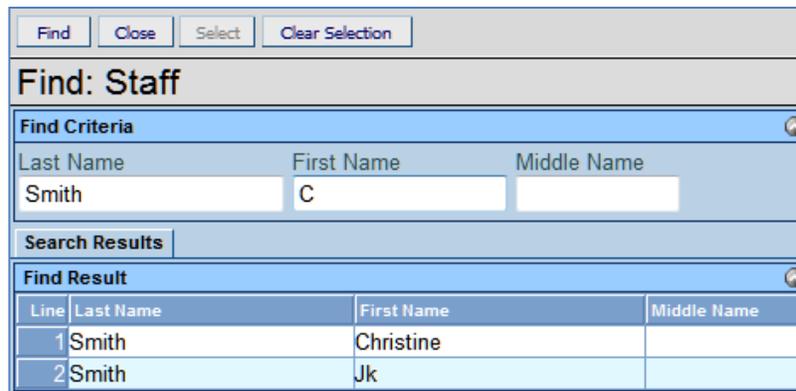


Figure 3-379 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.

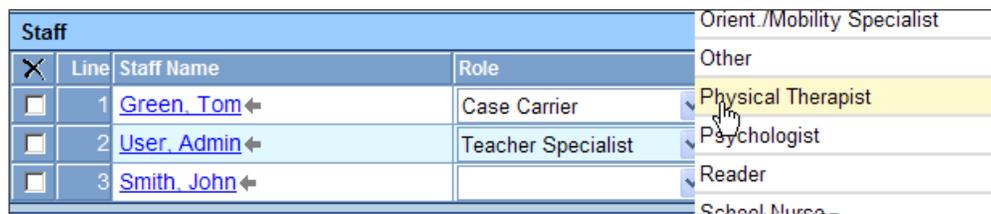


Figure 3-380 Eligibility Determination - Specific Learning Disability Screen Staff Section Role Selection

6. Click the **Role** drop-down and select the staff role.
7. Click the **Agree/Disagree** dropdown and select whether the staff participant **Agrees** or **Disagrees** with this eligibility determination.

To add an additional staff participant:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.

3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

4. Click the **Add** on the Other Participants bar. A new row will be added.
5. Enter the **Name** and **Job Title** of the participant.
6. Click the **Agree/Disagree** dropdown and select whether the other participant **Agrees** or **Disagrees** with this eligibility determination.
7. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
8. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
9. Enter that person's **Phone** number.
10. Click .

11. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 66 – ELIGIBILITY DETERMINATION - SPEECH/LANGUAGE IMPAIRMENT

The Eligibility Determination - Speech/Language Impairment contains one tab:

- **Eligibility Determination**

**Eligibility Determination**

Student Name: **Cooper, Jake D.** Document: **GENAZ 66** Description: **Eligibility Determination - Speech/Language Impairment**

**Eligibility Determination**

Document Name: Eligibility Determination - Speech/Language Impairment Document Date: [Calendar Icon]

There has been a lack of instruction in reading and math [Dropdown]

The student is limited English proficient [Dropdown]

If either response is "Yes", provide an explanation: [Text Area]

A LANGUAGE IMPAIRMENT is a communication disorder characterized by difficulty in the comprehension or use of spoken language, as determined by evaluation, to the extent that it adversely affects the child's educational performance. The determination is based on the following eligibility requirements:

**Eligibility Criteria**

LANGUAGE: A student must exhibit impairment in one or more of the following: expressive language (e.g. grammar, syntax, verbal expression, alternative/augmentative communication); receptive language (e.g. understanding, verbal reasoning, word meaning); pragmatic language (functional use of language in school).

A SPEECH DISABILITY is a communication disorder that interferes with the student's verbal expression and speech intelligibility, as determined by evaluation, to the extent that it adversely affects the child's educational performance. The determination is based on the following eligibility requirements:

**Eligibility Criteria**

SPEECH: (A student must exhibit one or more of the following, as indicated by a checkmark)

Impairment in articulation (the production of speech sounds) and intelligibility

Impairment in communication fluency, such as stuttering

Impairment in voice

**Eligibility Criteria**

A student must exhibit both of the following:

The impairment adversely affects the child's educational performance.

The adverse effects of the impairment on educational performance ARE NOT correctable without Special Education.

**Eligibility Decision**

Decision (Language Impaired) [Dropdown]

Decision (Speech Impaired) [Dropdown]

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used)

Grades  Parent Report  Work Samples

School Records  Medical Reports  Psychoeducational Evaluations

Classroom Teacher(s) Report  Group Achievement Test  Individual Achievement Tests

Classroom Observations  Speech/Language Evaluation

IEP (Date) [Calendar Icon]

Other [Text Area]

Figure 3-381 Eligibility Determination - Speech/Language Impairment Screen

To create an Eligibility Determination - Speech/Language Impairment document:

1. Enter the **Document Date** (MMDDYY) or click [Calendar Icon] and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.

- If either response is **Yes**, provide an explanation in the textbox. Use  to spellcheck. Use  for more space.

The Eligibility Criteria sections contain checkboxes that determine if the student meets the criteria for eligibility.

- Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.
- Check the Sources of Data Used to Make this Decision.
- Enter the current **IEP (Date)** (MMDDYY) or click  and select date.
- Add any **Other** source of data used to make this decision that might apply.

The screenshot shows the 'Participants' section of a software interface. It is divided into several sub-sections:

- Participants:** A checkbox labeled 'Student Is Participant'.
- Parent Participants:** A table with columns: Line, Parent Name, Relation, Educational Rights, Contact Allowed, and Participant.
 

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>
- Staff Participants:** A table with columns: Line, Staff Name, and Role. It includes an 'Add' button.
 

Line	Staff Name	Role
1	Admin User	Case Carrier/Special Education
- Other Participants:** A table with columns: Line, Name, and Job Title. It includes an 'Add' button.
- Contact:** Fields for 'Contact Person' (with a dropdown menu showing 'User, Admin') and 'Phone'.

Figure 3-382 Eligibility Determination - Speech/Language Impairment Screen Participants Section

- Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
- On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

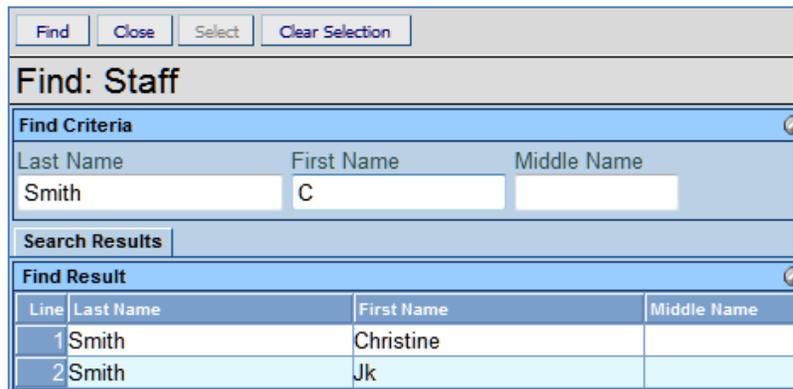
The screenshot shows the 'Staff' section of the software interface. It features a table with columns: Line, Staff Name, and Role. There is an 'Add' button in the top right corner.

Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist

Figure 3-383 Eligibility Determination - Speech/Language Impairment Screen Staff Role Selection

Change current staff names:

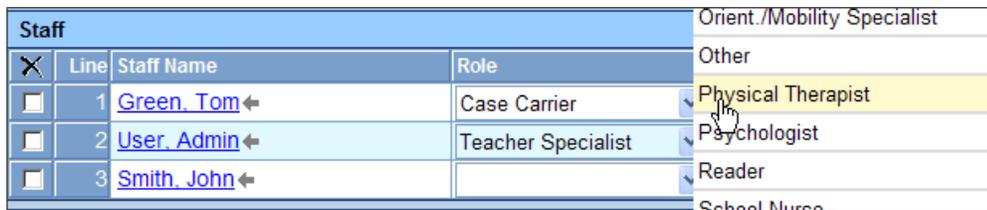
1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.



Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-384 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.



Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist
3	Smith, John	

Figure 3-385 Eligibility Determination - Speech/Language Impairment Screen Staff Section

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.
6. Click .
7. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 67 – ELIGIBILITY DETERMINATION - TRAUMATIC BRAIN INJURY

The Eligibility Determination - Traumatic Brain Injury contains one tab:

- **Eligibility Determination**

**Eligibility Determination**

Student Name: **Sabin, Heather R.** Document: **GENAZ 67** Description: **Eligibility Determination - Traumatic Brain Injury**

**Eligibility Determination**

Document Name: **Eligibility Determination - Traumatic Brain Injury** Document Date:

There has been a lack of instruction in reading and math

The student is limited English proficient

If either response is "Yes", provide an explanation:

The term TRAUMATIC BRAIN INJURY means an acquired injury to the brain caused by an external physical force, resulting in total or partial functional disability or psychosocial impairment, or both, that adversely affects a student's educational performance. This term applies to open or closed head injuries resulting in mild, moderate or severe impairment. A student being considered for eligibility for Special Education under the category of TRAUMATIC BRAIN INJURY IMPAIRMENT must meet all of the following eligibility criteria, as indicated by a checkmark:

**Eligibility Criteria**

The brain injury caused by an external physical force resulted in total or partial functional disability or psychosocial impairment or both.

The brain injury does not include congenital (cerebral palsy) or degenerative (multiple sclerosis) or birth injury.

Medical certification of educational implications of impairment is on file.

The impairment adversely affects the child's educational performance.

The adverse effects of the impairment on educational performance are not correctable without Special Education.

**Eligibility Decision**

Decision:

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used) IEP (Date)

Grades  Parent Report  Work Samples

School Records  Medical Reports  Psychoeducational Evaluations

Classroom Teacher(s) Report  Group Achievement Test  Individual Achievement Tests

Classroom Observations

Other

**Participants**

Student Is Participant

**Parent Participants**

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Sabin, Brian	Father	Yes	Yes	<input type="checkbox"/>
2	Sabin, Judith	Mother	Yes	Yes	<input type="checkbox"/>

**Staff Participants**

Line	Staff Name	Role
1	Admin User	Case Carrier/Special Education
2	Cissy Horn	Special Ed Teacher

**Other Participants**

Line	Name	Job Title
------	------	-----------

**Contact**

Contact Person:  Phone:

User, Admin

Figure 3-386 Eligibility Determination - Traumatic Brain Injury Screen

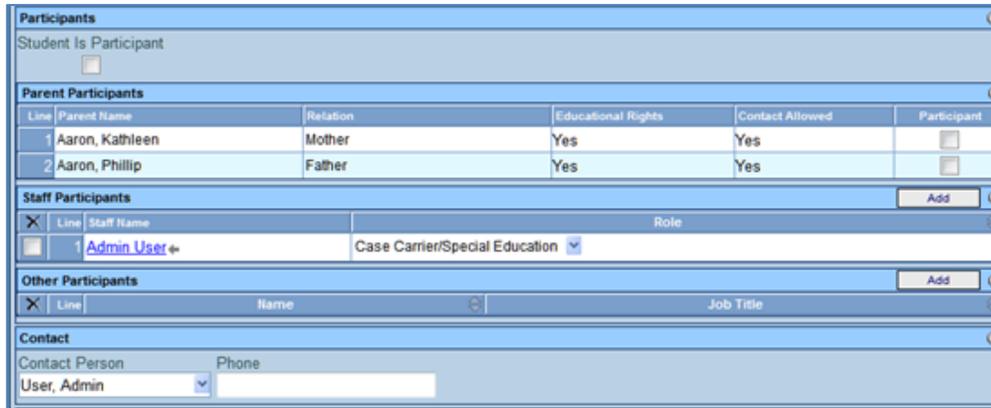
To create an Eligibility Determination - Traumatic Brain Injury document:

1. Enter the **Document Date** (MMDDYY) or click  and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.

- If either response is **Yes**, provide an explanation in the textbox. Use  to spellcheck. Use  for more space.

The Eligibility Criteria sections contain checkboxes that determine if the student meets the criteria for eligibility.

- Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.
- Check the Sources of Data Used to Make this Decision.
- Enter the current **IEP (Date)** (MMDDYY) or click  and select date.
- Add any **Other** source of data used to make this decision that might apply.



Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>

Line	Staff Name	Role
1	Admin User	Case Carrier/Special Education

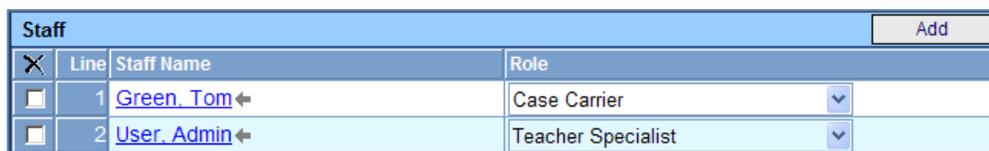
Line	Name	Job Title

Contact Person: User, Admin | Phone: [ ]

Figure 3-387 Eligibility Determination - Traumatic Brain Injury Screen Participants

- Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
- On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

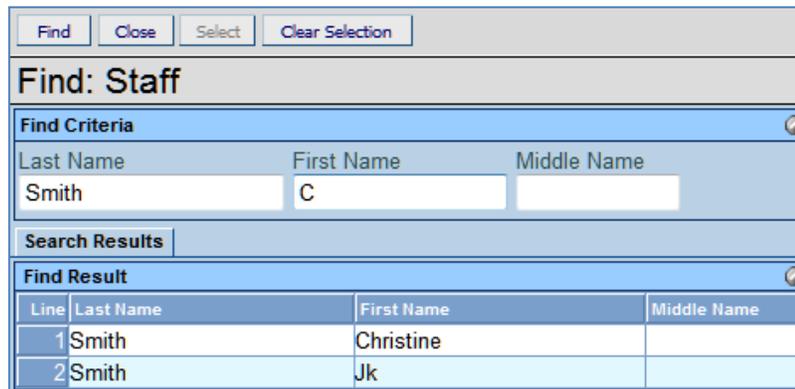


Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist

Figure 3-388 Eligibility Determination - Traumatic Brain Injury Screen Staff Role Selection

Change current staff names:

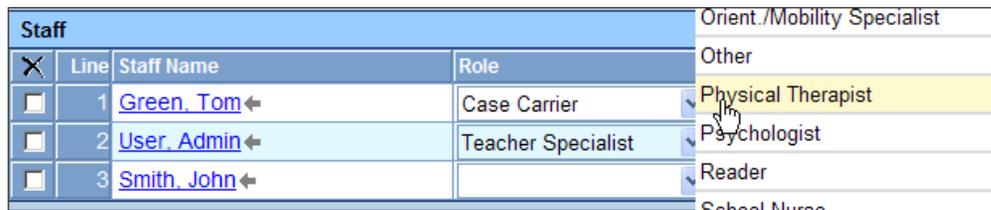
1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.



Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-389 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.



Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User Admin	Teacher Specialist
3	Smith, John	

Figure 3-390 Eligibility Determination - Traumatic Brain Injury Screen Staff Section Role Selection

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.
6. Click .
7. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 68 – ELIGIBILITY DETERMINATION - VISUAL IMPAIRMENT

The Eligibility Determination - Visual Impairment contains one tab:

- **Eligibility Determination**

Student Name: **Sabin, Heather R.** Document: GENAZ 68 Description: Eligibility Determination - Visual Impairment

**Eligibility Determination**

Document Name: Eligibility Determination - Visual Impairment Document Date: [Calendar Icon]

There has been a lack of instruction in reading and math [Dropdown]

The student is limited English proficient [Dropdown]

If either response is "Yes", provide an explanation: [Text Area]

A VISUAL IMPAIRMENT is an impairment in vision that, even with correction, adversely affects a child's educational performance. The term includes both partial sight and blindness. Partial sight is defined as 20/70 or less in the better eye, with correction. Legal blindness is defined as 20/200 or less in the better eye, with correction, or a field of vision no greater than 20 degrees. This determination is based upon all the following eligibility criteria, as indicated by a checkmark:

**Eligibility Criteria**

- The student has had a current ophthalmologic evaluation to establish that a disorder is present whether it is progressive, and the severity of the impairment.
- The impairment adversely affects the child's educational performance.
- The adverse effects of the impairment, on educational performance are not correctable without Special Education.

**Eligibility Decision**

Decision: [Dropdown]

SOURCES OF DATA USED TO MAKE THIS DECISION: (Check those used) IEP (Date) [Calendar Icon]

- Grades  Parent Report  Work Samples
- School Records  Medical Reports  Psychoeducational Evaluations
- Classroom Teacher(s) Report  Group Achievement Test  Individual Achievement Tests
- Classroom Observations

Other [Text Area]

**Participants**

Student Is Participant

**Parent Participants**

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Sabin, Brian	Father	Yes	Yes	<input type="checkbox"/>
2	Sabin, Judith	Mother	Yes	Yes	<input type="checkbox"/>

**Staff Participants** [Add]

Line	Staff Name	Role
1	Cissy Horn	Special Ed Teacher
2	Admin User	Case Carrier/Special Education

**Other Participants** [Add]

Line	Name	Job Title
------	------	-----------

**Contact**

Contact Person: User, Admin Phone: [Text Field]

Figure 3-391 Eligibility Determination - Visual Impairment Screen

To create an Eligibility Determination - Visual Impairment document:

1. Enter the **Document Date** (MMDDYY) or click [Calendar Icon] and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use [Spellcheck Icon] to spellcheck. Use [Expand Icon] for more space.

The Eligibility Criteria sections contain checkboxes that determine if the student meets the criteria for eligibility.

4. Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.
5. Check the Sources of Data Used to Make this Decision.
6. Enter the current **IEP (Date)** (MMDDYY) or click  and select date.
7. Add any **Other** source of data used to make this decision that might apply.

The screenshot shows the 'Participants' section of the Visual Impairment Screen. It contains several sub-sections:

- Student is Participant:** A checkbox that is currently unchecked.
- Parent Participants:** A table with columns: Line, Parent Name, Relation, Educational Rights, Contact Allowed, and Participant.
 

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>
- Staff Participants:** A table with columns: Line, Staff Name, and Role. It shows one entry: Line 1, Staff Name 'Admin User', Role 'Case Carrier/Special Education'. There is an 'Add' button to the right.
- Other Participants:** A table with columns: Line, Name, and Job Title. It is currently empty with an 'Add' button to the right.
- Contact:** A section with 'Contact Person' and 'Phone' fields. The 'Contact Person' dropdown is set to 'User, Admin'.

Figure 3-392 Eligibility Determination - Visual Impairment Screen Participants Section

8. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
9. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

The screenshot shows the 'Staff' section of the Visual Impairment Screen. It contains a table with columns: Line, Staff Name, and Role. There is an 'Add' button to the right of the table header.

Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist

Figure 3-393 Eligibility Determination - Visual Impairment Screen Staff Role Selection

Change current staff names:

1. Click  next to the **Staff Name** to change. The Find: Staff screen displays.

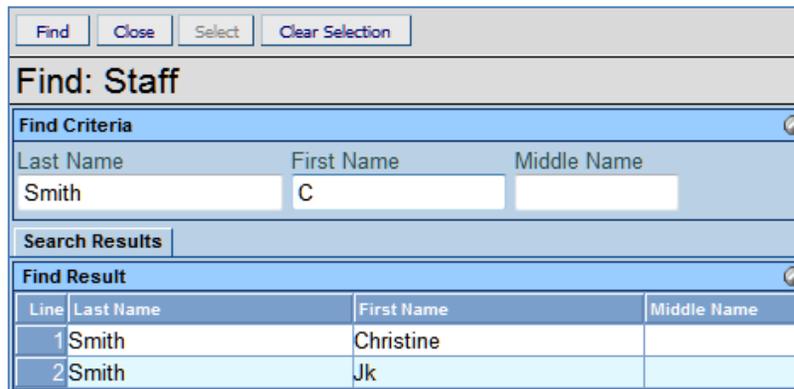


Figure 3-394 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click  or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.
5. Click again or click . Find: Staff screen closes and staff name displays.

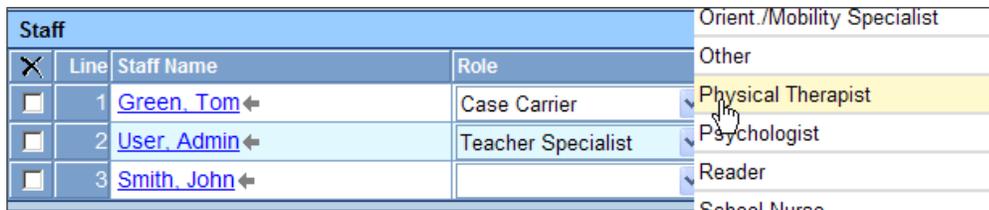


Figure 3-395 Eligibility Determination - Visual Impairment Screen Staff Section Role Selection

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.
3. If needed, check  on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.
3. If needed, check  on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.
6. Click .
7. The document can be [printed](#), [validated](#) and [finalized](#).

## GENAZ 69 – ELIGIBILITY DETERMINATION - NON ELIGIBLE CHILD

Eligibility Determination - Non Eligible Child contains one tab:

- **Eligibility Determination**

**Eligibility Determination - Non-Eligible Child**

Student Name: Sabin, Heather R. Document: GENAZ 69 Description: Eligibility Determination - Non-Eligible Child

**Eligibility Determination**

Document Name: Eligibility Determination - Non-Eligible Child Document Date: [Calendar Icon]

Date of eligibility decision: [Calendar Icon]

**The determination of eligibility for special education is based on an evaluation pursuant A.R.S. 15-766 and the following requirements:**

The student was evaluated in all areas related to the suspected disability.

There has been a lack of instruction in reading and math [Drop-down]

The student is limited English proficient [Drop-down]

If the response to one or both of the two items above is "Yes," provide an explanation: [Text Area]

**Team decision regarding the presence of a disability:**

The student does not meet the criteria as a child with a disability under the IDEA.

Note: A student shall not be determined to be a child with a disability if the determinant factor is a lack of appropriate instruction in reading, (including the essential components of reading instruction), lack of appropriate instruction in math, or limited English proficiency.

Parent has been provided with a written notice (PWN) regarding this decision that meets the requirement under the IDEA.

**Team members who participated in this decision included:**

Student Is Participant

**Parent Participants**

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Sabin, Brian	Father	Yes	Yes	<input type="checkbox"/>
2	Sabin, Judith	Mother	Yes	Yes	<input type="checkbox"/>

**Staff Participants** [Add]

Line	Staff Name	Role
1	Cissy Horn	Special Ed Teacher
2	Admin User	Case Carrier/Special Education

**Other Participants** [Add]

Line	Name	Job Title
------	------	-----------

Figure 3-396 Eligibility Determination - Non Eligible Child Screen

To create an Eligibility Determination - Non Eligible Child document:

1. Enter the **Document Date** (MMDDYY) or click [Calendar Icon] and select date. This should reflect the date the document was created.
2. Respond to the statements by selecting **Yes** or **No** from the drop-downs.
3. If either response is **Yes**, provide an explanation in the textbox. Use [Spellcheck Icon] to spellcheck. Use [More Icon] for more space.

The Eligibility Criteria sections contain checkboxes that determine if the student meets the criteria for eligibility.

4. Based on the criteria selected, indicate the decision of whether the student **is** or **is not** eligible using the drop-down selection.
5. Check the Sources of Data Used to Make this Decision.
6. Enter the current **IEP (Date)** (MMDDYY) or click [Calendar Icon] and select date.

7. Add any **Other** source of data used to make this decision that might apply.

Line	Parent Name	Relation	Educational Rights	Contact Allowed	Participant
1	Aaron, Kathleen	Mother	Yes	Yes	<input type="checkbox"/>
2	Aaron, Phillip	Father	Yes	Yes	<input type="checkbox"/>

Line	Staff Name	Role
1	Admin User	Case Carrier/Special Education

Figure 3-397 Eligibility Determination - Non Eligible Child Screen Participants Section

8. Check **Student** to include the student's name as a participant. If the checkbox is left blank the name will not be included as a participant.
9. On the Parents section, check **Participant**, to include each parent/guardian name as a participant. If these are left blank, the names will not be included as participants.

The Staff section displays the staff members who have been added to the student's Team List. Names can be added or removed from the staff section of this document without affecting the student's Team List. If a Staff name is added to this document, the name will display on this document only and not on the student's Team List. Staff Names displaying will be included as participants, however changes may be made including additional staff names added.

Change current staff names:

Line	Staff Name	Role
1	Green, Tom	Case Carrier
2	User, Admin	Teacher Specialist

Figure 3-398 Eligibility Determination - Non Eligible Child Screen Staff Role Selection

1. Click **←** next to the **Staff Name** to change. The Find: Staff screen displays.

Line	Last Name	First Name	Middle Name
1	Smith	Christine	
2	Smith	Jk	

Figure 3-399 Find: Staff Screen

2. Enter all or part of staff **Last Name, First Name**.
3. Click **Find** or press **ENTER**. Search Results displays a list of matching criteria.
4. Click line of staff name. Line highlights.

5. Click again or click . Find: Staff screen closes and staff name displays.

Staff			
	Line	Staff Name	Role
<input type="checkbox"/>	1	<a href="#">Green, Tom</a> 	Case Carrier
<input type="checkbox"/>	2	<a href="#">User, Admin</a> 	Teacher Specialist
<input type="checkbox"/>	3	<a href="#">Smith, John</a> 	

Orient./Mobility Specialist  
 Other  
 Physical Therapist  
 Psychologist  
 Reader  
 School Nurse

Figure 3-400 Eligibility Determination - Non Eligible Child Screen Staff Section Role Selection

6. Click the **Role** drop-down and select the staff role.

Add staff names:

1. Click **Add** on the Staff bar. A new line is added to the grid.
2. Repeat the procedure above.

3. If needed, check   on the line of the staff name to remove. The row is removed.

The Other Participants section will allow for participant names that are not available in the Staff directory.

1. Click the **Add** on the Other Participants bar. A new row will be added.
2. Enter the **Name** and **Job Title** of the participant.

3. If needed, check   on the line of the staff name to remove. The row is removed. Use  to spellcheck. Use  for more space.
4. The Contact Person drop-down displays staff member names from the Staff Participants list. Select the appropriate staff participant's name to display as the **Contact Person**.
5. Enter that person's **Phone** number.

6. Click .

The document can be [printed](#), [validated](#) and [finalized](#)

# **Chapter Four: DOCUMENTS WITH UNIQUE FUNCTIONALITY**

In this chapter, the following topics are covered:

- ▶ What SE Documents have unique features
- ▶ What is the impact on the student's special education status

## SE DOCUMENTS WITH SPECIAL FEATURES

All documents within Synergy SE have similar functionality; however there are certain documents that contain unique features which affect the student's special education status as well as process movement within the application. The following list briefly explains those documents.

---

### INITIAL

- [GENAZ 04 – Notice of Evaluation Decision](#)

If the Team determines that the student WILL NOT be evaluated, the decision to NOT evaluation option is selected. Finalizing the Notice of Evaluation Decision will exit the student from Synergy SE. All previously created documents including this notice are sent to Historical Documents.

---

### INITIAL, RE-EVAL

- [GENAZ 08 – Notice of Eligibility](#)

If the Team determines that the student is NOT ELIGIBLE FOR PLACEMENT, the NOT eligible for placement option is selected. Finalizing the Notice of Eligibility will exit the student from Synergy SE. All previously created documents including this notice are sent to Historical Documents.

---

### INITIAL, REVIEW, RE-EVAL

- [GENAZ 12 – IEP](#)

The IEP is located at the end of each of the processes (except for Transfer). The IEP is the “trigger” document that will close out the current process and move the student to the next appropriate process. A copy of the draft IEP always moves with the student to the next process. All created and finalized documents (including the IEP) will be sent to Historical Documents.

---

### RE-EVAL

- [GENAZ 15 – Notice of Reevaluation Waiver](#)

A Reevaluation Waiver is conducted when the district and the student's team agree that the Triennial Evaluation will be waived. When the Notice of Re-Evaluation Waiver has been finalized, the student will automatically move to the Annual Review process. A copy of the draft IEP (yellow icon) will move with the student.

- [GENAZ 20 – Notice of Termination](#)

A Notice of Termination is created when a student is terminated from a specific service or all services. If terminating from ALL services is selected, Finalizing the Notice to Terminate will exit the student from Synergy SE. All previously created documents including this notice are sent to Historical Documents.

---

### PRESCHOOL

- [GENAZ 26 – Notice of Evaluation Decision](#)

The Notice of Evaluation Decision works similarly to GENAZ 04 but is specific to Preschool students. If the Team determines that the student WILL NOT be evaluated, the decision to NOT evaluation option is selected. Finalizing the Notice of Evaluation Decision will exit the student from Synergy SE. All previously created documents including this notice are sent to Historical Documents.

---

**Ad Hoc**

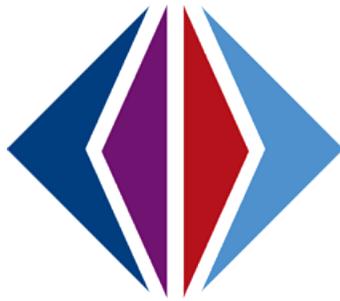
- **[GENAZ 100 – Notice of Graduation](#)**

The Notice of Graduation is created when the student graduates from high school. Finalizing the Notice of Graduation will exit the student from Synergy SE. All previously created documents including the graduation notice will be saved in Historical Documents. The draft IEP (yellow icon) must be deleted prior to finalizing the notice.



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