

# SpEdDoc 8 Find Guide

## SpEdDoc 8

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August 2009



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## **Introduction**

SpEdDoc 8 finds can be conducted from scratch, but frequently you can save time by using buttons on the Student and IEP Main Menus to create IEP lists and reports (see detailed information later in this document):

- Duration: List of IEP's with initiation and duration dates.
- Transition: List of IEP's with indication of whether the Transition Plan is complete.
- Goal Progress: List of IEP's with indication of whether progress has been reported and, if so, what percent of goals show progress or mastery.
- Find Services: Find screen for searching the content of the IEP Services page.
- Find Accommodations: Find screen for searching the content of the IEP Accommodations portal, e.g., to generate a report of accommodations required for state testing.
- IEP Status: List of IEP's with indication of whether certain required information has been entered (mouse over the colored balloons to view what each column encompasses).

## **Finding a Set of Records in Student**

The Find screen – accessed from the Find button located on the bottom of most Student screens as well as on the Export to Transfer screen – allows a single student to be found by entering the student's name in the Student Name field. Or, to find multiple students, select the New Find Request button in between each selection (press Continue after the last name is entered). Students can also be found based on other criteria. For instance, all Active students in Grade 9 could be selected in order to export them to send to the high school.

Conducting a search from the Student Find screen yields current information. To search documents, conduct your find from those documents or from the buttons in the IEP section of Student Main Menu.

### **Examples using the Find screen in Student**

- To find all students (including archived records that are ordinarily hidden), enter \* for student name and press Continue.

- To create a found set with one student, enter a student name (or use the Student Name as popup list) and press Continue.
- To create a found set with multiple students, enter a student name, click New Find Request at the bottom of the screen to enter the second student name. Repeat the process, clicking New Find Request in between entry of each student name. After entering the last student name, press Continue to find the group.
- To find all the students belonging to a Facility, enter that Facility and press Continue to create a found set of all students at that school.
- To find all the students for to a case manager, enter the CM's User Code and press Continue.
- To find all the students belonging to a Facility and a particular case manager, enter that Facility and CM's User Code and press Continue to create a found set of all students for that CM at that school.

## Searching IEP's with Find Services

Use the Find Services feature to search services across IEP's and generate summary reports that offer subtotals and grand totals for the amount of time services are provided. Access Find Services through buttons on the Student and IEP Main Menus.

How you create your report depends on what you want to find as well as the consistency and completeness of the IEP Services pages. For instance, if there are multiple names for the same service, it will take more work to include them all in your query. Further, if the Initiation/

Duration dates are not entered for each service on the IEP's, then your query will be limited to identifying services in current IEP's (including some services that will be/were implemented at another point in the year). The following examples provide ideas for report generation.

### Report of all current IEP services

- Click on Find Services (button on Student Main Menu).
- In the Student section, enter Active in the Status CC field.
- In the Services section, enter the current date in the Single Date field.
- Click the Continue button to go a list of all the found Services.
  - Click one of the top Services buttons to summarize by service, or
  - Click one of the bottom Services buttons to further summarize services by Type (Professional or Paraprofessional, Individual or Group).
- Click Continue to proceed with printing, or Cancel to return to your found set of services.

*This report displays all the current services in IEP's for Active students.*



**Report, by student, of all current IEP services**

- Click on Find Services (accessed through button on Student Main Menu).
- In the Student section, enter Active in the Status CC field.
- In the Services section, enter the current date in the Single Date field.
- Click the Continue button to go a list of all the found Services.

- Click the Student button to summarize services by student, or
- Click the Facility button to summarize services by facility the student is attending (as indicated on the IEP Cover page).

Services											
Period	Cat.	Services	Personnel of Provider	Location	Duration (minutes)	Sess.	Freq.	Group Size	Mode	Student	CM
<b>Howard Dean</b> 562.5 min. ( 9.37 hrs. )											
11/11/07 To 6/11/08	SpEd	Case Management	Case Manager	Resource Room	30	1	Weekly	1:1	M	Howard Dean	Richard Speddoc
11/11/07 To 6/11/08	SpEd	Language Arts	Special Education Instructor	Resource Room	80	2.5	Weekly	Sm. Group	D	Howard Dean	Richard Speddoc
11/11/07 To 6/11/08	RS	Occupational Therapy	Occupational Therapy Aide	Resource Room	20	3	Weekly	1:1	I	Howard Dean	Richard Speddoc
11/11/07 To 6/11/08	RS	Speech Language	Sp. Lang. Pathologist (CCC)	Teacher's Classroom	15	4	Weekly	Sm. Group	D	Howard Dean	Richard Speddoc
11/11/07 To 6/11/08	RS	Counseling	School-based Clinician	Brain Center	50	1	Monthly	1:1	D	Howard Dean	Richard Speddoc
11/11/07 To 6/11/08	SpEd	Math	Special Education Instructor	Resource Room	80	2.5	Weekly	Sm. Group	D	Howard Dean	Richard Speddoc
<b>Julie Roberts</b> 295 min. ( 4.92 hrs. )											
11/19/07 To 6/11/08	SpEd	Case Management	Case Manager	Resource Room	45	1	Weekly	1:1	M	Julie Roberts	Richard Speddoc
11/19/07 To 6/11/08	SpEd	Math	Paraprofessional	Teacher's Classroom	45	4	Weekly	Sm. Group	I	Julie Roberts	Richard Speddoc
11/19/07 To 6/11/08	RS	Counseling	Counselor (MSW)	Resource Room	30	1	Weekly	Sm. Group	D	Julie Roberts	Richard Speddoc

- Click Continue to proceed with printing, or Cancel to return to your found set of services.  
*This report displays all the services broken out by student or facility of attendance.*

**Report, by student, of current IEP services, by CM**

- Click on Find Services (accessed through a button on the Student Main Menu).
- In the Student section, enter Active in the Status CC field, CM name in Case Manager field.
- In the Services section, enter the current date in the Single Date field.
- Click the Continue button to go a list of all the found Services.
- Click the Student button to summarize services by student, or
- Click the Facility button to summarize services by facility the student is attending (as indicated on the IEP Cover page).
- Click Continue to proceed with printing, or Cancel to return to your found set of services.  
*This report displays, for the selected caseload, services broken out by student or facility of attendance. Repeat the above process for each case manager.*

**Report, by student, of current IEP services, by IEP School**

- Click on Find Services (accessed through a button on the Student Main Menu).
- In the Student section, enter Active in the Status CC field and the facility in the School field.
- In the Services section, enter the current date in the Single Date field.
- Click the Continue button to go a list of all the found Services.
- Click the Student button to summarize those services by student.
- Click Continue to proceed with printing, or Cancel to return to your found set of services.  
*This report displays services broken out by the facility the student is attending (as indicated on the IEP Cover page).*

## Report, by student, of current IEP services, by CM School

- Click on Find Services (accessed through a button on the Student Main Menu).
- In the Student section, enter Active in the Status CC field and CM School in the CM School field.
- In the Services section, enter the current date in the Single Date field.
- Click the Continue button to go a list of all the found Services.

- Click the Student button to summarize services by student, or
  - Click the Facility button to summarize services by facility the student is attending (as indicated on the IEP Cover page).
  - Click Continue to proceed with printing, or Cancel to return to your found set of services.
- This report displays, for the collective caseloads of the selected school, services broken out by student or facility of attendance. If the CM's are responsible for students attending out-of-district schools, then multiple facilities will be reflected on the report.*

## Report, by service, of current IEP services by aides

- Click on Find Services (accessed through a button on the Student Main Menu).
  - In the Student section, enter Active in the Status CC field.
  - In the Services section, enter the current date in the Single Date field and select Paraprofessional in the Provider field.
  - Click the Continue button to go a list of all the found Services.
    - Click the top Services button to summarize by services, or
    - Click the bottom Services button to summarize services by Type (Para Ind or Para Grp).
  - Click Continue to proceed with printing, or Cancel to return to your found set of services.
- This report displays all the current services provided by Paraprofessionals in IEP's for Active students.*

## Using the Single Date field

The Single Date field searches based on the date range reflected at the beginning of each line of services on the IEP Services page. This provides a snapshot of services in effect on the selected date. If your IEP's are missing those dates, then an alternative is to do a find for all services in current IEP's

by using a date from one year ago. For example, enter >11/30/06 in the IEP Meeting Date field rather than entering a Single Date to find all services after that date. That approach is generally less desirable because it captures all services in effect at any time after the specified date. It may also include services for students who have exited special education.

## Searching documents with the Find button

Many documents have a Find Student button above the Print buttons to permit searching based on Student, Case Manager, Status or Child Count Status. The IEP, Evaluation, 504 Plan and 504 Evaluation sections offer an expanded find screen similar to Student Main Data. This allows users to conduct advanced finds based on a combination of fields from Student and the current section. Here are some examples.

### Find IEP's of active grade 9 students with transition goals

- Go to an IEP Goal page and click the Find Student button.
- Select Grade 9 and CC Status Active, then click Continue Find on Current Layout.
- On the Goals Find screen, check the T box and then click Continue.
- Go to IEP Main Menu and select Transition button to view found set of IEP's.

### Find IEP's of active grade 9 students with transition goals & services

- Go to an IEP Goal page and click Find Student.
- Select Grade 9 and CC Status Active, then click Continue Find on Current Layout.
- On the Goals find screen, check the T box and then click the Services button to go to that screen.
- On the Services find screen, enter Transition and then click Continue.
- Go to IEP Main Menu and select the Transition button to view found set of IEP's.

## Searching initial evaluations

Verify that the Consent and Decision dates were entered on the Evaluation Cover Page. If the Initial Evaluation was not written in SpEdDoc for a student, then enter those dates in Student Tracking. The two dates must be entered in one of those two locations for each student for the time period under review.

Initial Evaluation							
Name	CC #	CC Status	Grd	CM	Init Cons	Init Eval	Days
<b>Long</b>							SubTotal: 1
Samantha BeaWhich	1078749	Tuition	12	RAS	01/20/08	03/25/08	65
<b>On Time</b>							SubTotal: 2
Jolly Jumper		Active	03	PRH	09/17/07	10/31/07	44
Julie Roberts	1018222	Active	10	RAS	02/01/08	02/14/08	13
<b>Unknown</b>							SubTotal: 1
Haywood Yabuzzoff	0	None	11	PRH		12/06/07	
<b>Grand Total: 4</b>							

### Find and view initial evaluations

- Log into SpEdDoc with the SU Password (to access all the records).
- Click the *Initial Evaluation* button on the Student Main Menu to display a list of Initial Evaluation dates entered in SpEdDoc. Then select a button on the bottom of the Initial Evaluation list to refine your search.
- If SpEdDoc calculates the length of those evaluations (based on the Consent and Decision dates). There are four buttons on the bottom of the Initial Evaluation page that find results for last school year or this school year:
  - Select the *Last Year Init List* button. This finds just the students with an Initial Evaluation completed last school year (based on the Decision date). Click the italicized column headings to sort, e.g., click the Result heading to sort accordingly.
  - Select the *Last Year Init Report* button. This finds the same students as the *Last Year Init List* button, but automatically creates a report summarized by the Result:
    - Error (Consent postdates Decision)
    - Long (Decision more than 60 days after Consent)
    - On Time (Decision within 60 days of Consent)
    - Unknown (Can't calculate because of missing Consent date)
  - Select the *This Year Init List* button. This finds just the students with an Initial Evaluation completed this school year (based on the Decision date). Click the italicized column headings to sort, e.g., click the Result heading to sort accordingly.
  - Select the *This Year Init Report* button. This finds the same students as the *This Year Init List* button, but automatically creates a report summarized by the Result:
    - Error (Consent postdates Decision)
    - Long (Decision more than 60 days after Consent)
    - On Time (Decision within 60 days of Consent)
    - Unknown (Can't calculate because of missing Consent date)

### Submission of initial evaluation report to the DOE

For any records that indicate Error or Unknown in the Result column, enter the correct dates on the Evaluation Cover Page or, if the initial Evaluation was not created in SpEdDoc, on Student Tracking. Do not leave any marked Unknown unless Consent was not obtained. After eliminat-

ing Errors, run the *This Year Init Report* (until June 30) or *Last Year Init Report* (after June 30). This summarizes and totals the results required for the DOE monitoring report:

- A (Total of all Results)
- B (Total of Long and On Time Results)
- C (Total of On Time Results)

For those records with a Result of Long, the DOE requires that you create a list including the length (from the Days column), whether the Delay Notice was sent and the delay reason. If there is a Delay Notice with the notice date entered, then you will see the date in the Result column, e.g., Long 5/8/09. To view the Delay Notice:

- Go to Student Portals for a student with a Result of Long
- Click on the Go button for the student’s Initial Evaluation
- In the Evaluation record, click on the Eval Delay button

## Searching Transition IEP’s

The DOE requires that selected SU’s submit Transition IEP’s in July. SpEdDoc generates reports and exports to streamline the process and obviate the need to send paper IEP’s. You may also generate reports to assist with self-monitoring efforts.

Transition										Send to Transfer	
(Meet Date)										Age 6/30	Age at Exit
Student	CC #	DOB	Grd	CM	IEP Meet	Age	Exit	Result		Age 6/30 Last Yr	Age at Exit
Howard Dean		02/23/88	12	RAS	10/30/08	20		C		20	
Sam Walton		09/13/91	12	RAS	12/01/08	17	01/11/09	C		16	17
Prince Charles		04/25/91	09	PRH	11/03/08	17		I		17	Enter trans
Miranda Wrights	1086829	04/14/92	10	RAS	09/02/08	16		C		16	
Julie Roberts	1018222	12/12/90	10	RAS	09/26/08	17		I		17	Enter trans
Total IEP's: 5											

### Find and view transition IEP’s

- Log into SpEdDoc with the SU Password (to access all the records).
- Click the *Transition* button on the Student Main Menu to display a list of IEP’s entered in SpEdDoc. Then select a button on the bottom of the Transition list to refine your search:
  - *Last Year Transition* button. This finds IEP’s with a meeting date from last year (before July 1) for students who turned 16 or older last year (but excluding students who exited before turning 16). Click on the italicized column headings to sort, e.g., click on the IEP Meeting heading to sort chronologically by Meeting Date.
  - *This Year Transition* button. This finds IEP’s with a meeting date from this year (since July 1) for students who turn 16 or older this year (but excluding students who exited before turning 16). Click on the italicized column headings to sort, e.g., click on the IEP Meeting heading to sort chronologically by Meeting Date.
  - *Find Mode* button. Here you can create a custom search. For instance, enter 9/1/2007...12/31/2007 in the IEP Meet field and >15 in the Age field to find all IEP’s created during that period for students who were at least age 16 on the meeting date.
- Click the italicized column headings to sort. For example, to determine whether the Transition plan has been written, click the Result heading and view the codes (or view code definitions in SpEdDoc by pausing the mouse cursor over one of the codes on the Transition list):

- C Complete (data entered in all Transition fields)
  - I Incomplete (some Transition fields are empty)
  - M Missing Meeting Date or DOB
  - O Meeting Date before FY10 school year (DOE criteria varied for older IEP's)
  - Y Younger than 15 at Meeting Date
- Note that entering data in Transition Plan fields yields a Result of Complete, but does not verify the quality of that plan).
  - After correcting IEP's missing the Meeting Date or DOB, select the *This Year Transition* button on the bottom of the Transition list. This finds just the IEP's written this school year (based on the IEP Meeting Date) for students turning 16 or older this year (but excluding students who exited before turning 16). Click the italicized column headings to sort.

### **Submission of transition report to the DOE**

Export the data to a SpEdDoc Transfer file and send it to the DOE. To export the pertinent IEP's and related information from a SpEdDoc server to the DOE:

- Verify that the Transfer file is in the SpEdDoc Folder located on the root level of the computer used to access SpEdDoc on your server.
- Log into SpEdDoc with the SU Password (to access all the records).
- Click the *Transition* button (on Student Main Menu) to generate a list of SpEdDoc IEP's for the found set of students.
- On the bottom of the Transition list, select the *This Year Transition* button (until June 30) or *Last Year Transition* (after June 30).
- Review the list of IEP's to be exported (note that students may have multiple IEP's written in the same year).
- On the top right of the Transition list, click the *Send to Transfer* button. This exports the IEP's in the found set to the Transfer file.
- Quit FileMaker, copy the Transfer file containing the exported records to a CD and send to the DOE.

## **Searching IEP goal progress reports**

The DOE requires that goal progress be reported for current IEP's twice annually if schools don't meet AYP for IEP students (due on or about February 1 and July 1). If one of the current progress codes has been selected for each objective for the progress period, then the SpEdDoc IEP Goal Progress report can identify the percent of goals with progress and the percent achieved. All the boxes need to be entered for each reporting period (even if an objective was reported as achieved in an earlier period). The current progress codes went into effect in August of 2006, so IEP's written prior to that date may not yield accurate results. Progress is credited for goals that have at least one objective coded A, E or S in the progress reporting period under consideration. Mastery is credited for goals that have all objectives coded A in the progress reporting column under consideration.



### **Find last complete IEP's**

Last Complete IEP's are those in which the latest Duration date falls in the past 365 days. Consequently, there will be more than one IEP in this set for any students who had more than one IEP end in the past 365 days. To review progress on Last Complete IEP's:

- Log into SpEdDoc with the SU Password (in order to access all the records).
- Click the *Goal Progress* button (on Student Main Menu) to generate a list of all SpEdDoc IEP's.
- On the bottom of the IEP Goal Progress report, select the *Last Complete* button. This finds IEP's completed in the past 365 days, based on the Duration dates. Click on the italicized column headings to sort, e.g., click on the IEP Meeting heading to sort chronologically by Meeting Date.
- Each IEP displays three lines. The top line displays the Progress Reporting Dates, the second line displays the percent of goals with progress and the bottom line displays the percent of goals achieved.