



Indiana IEP Walkthrough for District Administrators

IIEP Main Menu Page

1. Message of the Day

- a. Click Edit Message button from the main page.
- b. Type in Message of the Day to display on the IIEP main menu screen.
 - i. Adjust style, size, or color of the message.
 - ii. The message will appear for any user in the school district.
- c. Message of the Day will display as entered in a text box below.
 - i. Up to ten Message of the Day Slides may be created.
- d. Click Update Message to return to the Main Menu screen.
- e. The new Message of the Day will appear below IIEP system updates.

2. Student Data Widgets

- a. Several widgets appear on the main menu page depicting, Students by Disability, Overall Compliance, Service Logging, Overdue dates, and % Time in Special Education.
- b. This information updates nightly.

3. My Schools

- a. Lists each school with a visual representation of the compliance level.
- b. Click the Pie Chart to see a list of teachers with access to that school.
 - i. Here the compliance rate of the staff member is displayed.
 1. Click their pie charts to see their caseload.
 2. Click the user's name to edit their IIEP account settings.
- c. Click the name of the school to edit the school settings.
 - i. Address, phone number and length of school day may be adjusted here.

4. My Messages

- a. The message board displays all current messages from the IIEP system or responses from PCG.
 - i. Indiana IEP will post messages here regarding conference invitations and other events in the system.
- b. Send Message to ask Public Consulting Group (PCG) a regarding the operations of Indiana IEP.
- c. View All Messages to see the entire list of correspondence.

5. Documents

- a. At the bottom of the screen District Administrators see an Upload File(s) button.
 - i. Click the button to upload any files needed.
 - ii. Click Browse to find the necessary file.
 - iii. Enter a descriptive label for Teachers and Staff.
 - iv. If the file is replacing an existing document choose the document to be replaced.
 - v. Choose the category.
 1. This indicates which tab the document appears under on the Main Menu page.
 - vi. Click Upload File(s) to upload and return to the Main Menu page.
- b. District Administrators may delete, reorder and categorize files already displayed.
 - i. Click the checkbox in the DEL column to mark any file for removal.
 1. Click Delete/Update Documents to execute the change.
 - ii. To reorder the list of files in any category, type the new order in the New Pos

box.

1. Click Delete/Update Documents to execute the change.
- iii. To change the category under which a file appears.
 1. Click the dropdown box in the File Type Category column.
 2. Choose the new category from the dropdown menu.
- c. Click Delete/Update Documents to execute the change.

Calendar

1. Click the calendar icon from the green menu bar at the top of the page.
2. The Calendar presented in IIEP reflects the district calendar maintained through the local Student Information System.
 - a. Updates and changes made to the school district calendar will be reflected here.
 - b. Any non-instructional days should be documented in the school or school district information system.
 - i. The Calendar in IIEP will update to match the local changes overnight.
3. Indiana IEP uses the calendar to calculate evaluation timelines.

SmartScan

1. Click SmartScan from the green menu bar at the top of the page.
 - a. SmartScan is an alternative to the EasyFax option to collect parent signatures
2. Scan a signed document and save it to a local computer.
 - a. The signed document must be a final version.
 - b. The EasyFax barcode must appear at the bottom of the page.
3. Click "Choose File" to search your computer for the file.
4. Select the file and click "Open".
 - a. Repeat this process for multiple files.
5. Click "Upload File(s)" to import the selected files into IIEP.
 - a. The system will then read the barcode from the page and place the document with the correct student and IEP.
 - b. The signed document will appear beside the corresponding IEP or consent in the student's documents under the Fax/Scan column.
 - i. Click the link there to view or print the signed document.

School System

1. **Click Admin >School System from the green menu bar at the top of the page.**
2. This tab allows for management of inactive students, transfers, faxes, and the parent portal.
3. **School System Information and System Info**
 - a. This tab displays school district information as reported in INDOE records.
4. **Summary**
 - a. This page displays a brief summary of district data.
 - i. Specific reports may be run here to display Students by School, by Teacher, by Grade Level or by Disability.
5. **Inactive Students**
 - a. This allows the District Administrator to search for and view data for any inactive student.
 - b. Enter any piece of information in the search engine.
 - i. Click View Inactive Students.
 - ii. Click the Name of the student to access his or her information.
 1. Information includes:
 - a. Exit Information
 - b. Student History

c. Documents

d. Contacts

iii. Click Main Menu to return to the IIEP Main Menu.

6. Merge Students

- a. If a duplicate STN exists for a student, this mechanism consolidates the information into one STN.
- b. The STN must first be merged in the STN database.
 - i. First search for and find the student to keep.
 - ii. Find the STN/Student to merge.
 - iii. Merge the STN/student data.
- c. All IIEP information will now exist under the primary STN.

7. Unrecognized Faxes

- a. This page displays any unrecognized faxes received by PCG via EasyFAX.
 - i. View the unrecognized fax.
 - ii. Search for the student.
 - iii. Attach the fax to the correct student file.
- b. Click Manage Fax Numbers to view the Fax Numbers assigned to the District.

8. Student Transfer (only accessible for District Administrators – Transfer Accounts)

- a. Student Transfer allows districts to request or review then approve transfer requests from other school districts.
 - i. **Request Transfer**
 1. Click this option to request the transfer of student records from a student's previous district.
 2. Click Select Transfer Aggregate and Continue.
 3. Select the previous school district from the Source District Dropdown list.
 - a. Enter the student's name, Student ID (STN), and Date of Birth.
 - b. Up to 5 transfers may be submitted at a time.
 4. Click Request Student Transfer(s) to submit the request for approval.
 - ii. **Review Requests**
 1. **Click Review Requests to check the status of requested transfers and approve requests from other districts.**
 2. **Pending Request**
 - a. This list records all requests for transfers from other districts that have not been resolved.
 - b. Click Details for more information.
 - i. Pending Request Details
 1. Click View Notes to see any notes entered for this request.
 2. Click Cancel Transfer Request to end the process for this student.
 3. Click Update the Database to return to the Review Transfer Request screen.
 3. **Pending Transfer Denied**
 - a. If the previous school district denies the transfer it will appear in red under Pending Requests for Transfer.
 - b. Click Details for more information.
 - i. Pending Transfer Denied – Details
 1. From this screen the transfer request may be reviewed and Re-submitted if needed.
 2. View Notes for possible details from the school district.
 3. Update the Database to return to the Review

Transfer Requests Screen.

4. Approve Transfer Requests from other Districts

- a. This lists any pending requests from other districts for student records.
- b. Click Details to begin the process.

5. Review the request here and click Find Student to Transfer to continue.

6. Click Deny Transfer Request to stop the process.

- a. Click View Notes to see any notes from the new school district and add notes to explain the denial of transfer.
- b. Review the request here and click Find Student to Transfer to continue.
- c. Click Deny Transfer Request to stop the process.
- d. Click View Notes to see any notes from the new school district and add notes to explain the denial of transfer.

7. Select Student to Transfer

- a. This search tool will be prefilled with details from the transfer request.
 - i. In most cases only the student's initials and STN are necessary to start the search.
 - ii. This helps with misspellings.
 - iii. The STN must match!
- b. Click View Students to find matching students in your district.
 - i. If any students match the STN provided they will appear on this list.
 - ii. This search looks at both active and inactive students.
- c. Click the student's name to move to the next step.
 - i. If there are no results, click search again.
 - ii. If the student does not appear in any list, then the transfer should be denied with notes to explain the situation.

8. Approve Transfer Request

- a. Once the name is selected, the Approve Transfer Request screen appears.
- b. Choose the Reason for exiting.
 - i. This is usually transfer to another school system.
- c. Click Approve Transfer Request.
 - i. The requesting school district will now receive a message that the transfer has been approved.

9. Approved Transfer to District

- a. Students where the transfer of records has been approved appear on this list.
 - i. This is the final step in the transfer process.
 - ii. Once it is complete the student's records will appear in the new school district.
- b. Click Details for the next step.
 - i. Schedule Transfer Details
 1. Click Select Existing Destination Student.
 2. This process matches the requested records to the student enrolled in the receiving district.
 3. If the student is not currently enrolled in the district this process cannot be completed.
 4. Students must be enrolled to appear in IIEP and

complete the transfer process.

10. Selecting Transfer Destination Student

- a. This search tool will be prefilled with details from the transfer request.
 - i. In most cases only the student's initials and STN are necessary to start the search.
 - ii. This helps with misspellings.
 - iii. The STN must match!
- b. Click View Students to find matching students in your district.

11. Select Student to Transfer Search Results

- a. If a student with a matching STN is enrolled in the district their entry will appear here.
- b. Click the student's name for the next step in the process.
- c. If there are no results, check on the enrollment process.
- d. Once the enrollment is complete the student will appear.

12. Schedule Transfer

- a. Once the name is selected, the Transfer Request Details appear.
 - i. This screen displays the basic demographic information for the selected student.
 - ii. Scroll down the page to view all of the information.
- b. Click Schedule Transfer at the bottom of the page to complete the transfer process.
- c. Once the transfer is scheduled, IIEP will produce a notification in My Messages when the process is complete.
- d. Upon completion, all of the records from the previous school district will appear in the student's record for the current school district.

9. Parent Portal Pending Actions

- a. Indiana IEP Connect Parent Actions Search searches within a selected date range by school, grade, or document/event type for pending parent actions in the EdPlan Connect Parent Portal.
 - i. This report shows any documents/events awaiting parent approval or response.
- b. Click "Show Results" to create the report.
- c. Click "Show Alert Frequencies" to observe the frequency alerts are sent to parents by event/document.

Users

1. Click Admin > Users on the green menu bar at the top of the page.

- a. District Administrators manage user accounts, view compliance information, and caseloads of individual teachers and staff members.
- b. When a teacher or staff member is first given access to Indiana IEP, he or she is recorded as an Unknown User. To grant this individual access to students this user role must be changed.

2. Click Users to view a search tool.

- a. Type the users name into the name fields or select a User Type from the User Type list.
- b. Click View User to see any users that match the search criteria.
- c. From the list of users click the name of the account to be addressed.

3. The Edit User Information for the selected User opens.

- a. Some information displayed is fed from the state databases such as names, and email.

4. Assign the User Type.

- b. The most common user type is Teacher of Record.
- c. A complete list of user types and the access level provided is available in the IIEP Administrator User's Manual on the IIEP Main Menu page.

5. Check the box(es) for all Schools the User may access.

- d. District Administrator user types have access to all schools.

6. Click Update the Database to Record all changes.

7. View User Activity and View User Changes.

- a. These features show user activity and changes made to student records within a given date range.

8. Delete this user from the database.

- a. This will delete the current user from the system.
- b. The user must be removed from the state database as well.
- c. If not, the user will reappear as Unknown the following day after the nightly update occurs.

Schools

1. Click Admin>Schools on the green menu bar at the top of the page.

- a. This page allows an administrator to view a list of schools in the district and quickly view compliance information.

2. Select School

- a. The first column of this table is an icon for each school's calendar.
 - i. For details on the function of the Calendar see the Calendar section above.
- b. The column labeled Cp contains a pie chart displaying the percent the school is in compliance in regard to timelines.
 - i. Hold the mouse over the pie chart to see the actual percentage and number of students involved.
 - ii. Click the pie chart to see a list of teachers and staff at the school.
 - iii. Click the pie chart by the individual teacher to see the teacher's caseload.
- c. Click the school name in the third column to view and edit information about the school such as address, contact information, and length of school day.

Wizards

1. IEP/ISP at a Glance Wizard

- a. Click Wizards>Wizards>IEP/ISP at a Glance Wizard from the green menu at the top of the page
- b. This provides a concise snapshot of an IEP to share with General Education teachers or anyone else that needs to work with a student but may not benefit from access to the entire IEP.
- c. Choose students to generate an IEP/ISP at a glance.
- d. Click Continue.
- e. For each student either:
 - i. Skip this Student
 - ii. Create Draft and Move to Next Student
 - iii. Create Final and Move to Next Student
 - iv. Just Update the Database
 - v. Update and Move to Next Student
- f. IEP/ISP at Glance documents whether Draft or Final appear under the My Docs tab.

- i. Create Draft and Move to Next Student is the most useful option. Any final document created remains in the student record permanently. This is not necessary for this document.

2. Caseload Setup Wizard

- a. Click Wizards>Wizards>Caseload Setup Wizard from the green menu at the top of the page.
- b. This is the same process TORs follow to create caseloads and is available for District Administrators in event he or she may need to carry a caseload.
- c. To add students to the caseload, click the button at the bottom of the screen labeled, "Add More Students to Caseload".
 - i. Enter search criteria.
 - ii. Click View Students button.
 - iii. Students meeting search criteria display on screen.
 - iv. Check either TOR/Case Manager or Team Member for the students.
 - v. Click Add Students to Caseload button at the bottom of the page.
 1. or, Add Students to Caseload, then find more to complete another student search and add more students.
- d. Change the location of the check and update database to change from TOR/Case Manager to Team Member and vice versa.
- e. Remove both checks for a student to remove them from the Caseload.

3. Caseload Administration Wizard

- a. Click Wizards>Wizards>Caseload Administration Wizard from the green menu at the top of the page.
- b. This process allows District Administrators to manage caseloads for an entire district.
- c. Search for the user whose caseload is to be managed.
 - i. Enter or select search criteria.
 - ii. Click View Users.
- d. Results show:
 - i. Name
 - ii. Schools
 1. This is a list of all the schools accessible by this user.
 - iii. Students
 1. Current TOR/Case Manager - This shows the number of students for whom this user is teacher of record.
 2. Team Member – Shows the number of students on the caseload for which this user is teacher of service.
 - iv. Title
 1. The title stored in the system for this user.
 - v. User Type
 1. Displays the current user role recorded in the system.
- e. Click the Username to view the current caseload.
 - i. Click Add Students to Caseload button at the bottom of the page.
 1. Or, Add Students to Caseload then find more to complete another student search and add more students.
 - ii. Change the location of the check and update database to change from TOR/Case Manager to Team Member and vice versa.
 - iii. Remove both checks for a student to remove them from the Caseload.
 - iv. Click Remove All Students from Caseload to remove all students.
 - v. Click Transfer/Copy Caseload to Another User and follow prompts to transfer/copy the caseload to another user in the system.
 - vi. Click Select User to search for different user to view/manage his or her caseload.

Reports

1. Reports

- a. **Click Reports>Advanced Reporting from the green menu at the top of the page.**
- b. Advanced Reporting
 - i. Advanced Reporting is a system built into IIEP to create custom reports.
 - ii. District Administrators can find any field in the IEP system and create reports based on any designated criteria.
- c. **Click Reports>Reports from the green menu at the top of the page**
- d. Standard and Scheduled Reports
 - i. Details of each report listed in the Scheduled or Standard Reports exist in the Administrative User Manual on the IIEP Main Menu page.
 - ii. Each report asks for specific student or user information and generates specific reports based on the information entered.
 - iii. Once started the system will run the report and notify the author via email when the report is complete.
 1. Complete reports appear under **My Reports** and here at the bottom of the Reports page under **Saved System Reports**.

My Account

1. **Click My Account>My Calendar** from the green menu at the top of the page.
 - a. This calendar may be used to schedule and log services if service logging is enabled for the user account.
2. **Click My Account>My Docs** from the green menu at the top of the page.
 - a. This section lists all reports created for any student on the account owner's caseload if any.
 - b. A list of documents appears until the list is greater than 75 items.
 - c. When the list of documents is greater than 75 items a search tool appears.
 - i. The search tool allows users to filter results by grade, school, age of the document, and type of document.
 - d. Multiple items may be selected by checking the box in the batch column next to the document.
 - e. At the bottom of the page click "View Document Batch" to create a PDF of all the documents selected.
3. **Click My Account>My Reports** from the green menu at the top of the page.
 - a. This section lists all reports created under Standard and Scheduled Reports.

Students

1. View Students
 - a. Enter any part of a student's information or select criteria.
 - b. Click View Students to see a list of all students matching the selected criteria
2. Advanced Student Search
 - a. Click to view a page containing additional search criteria.
 - b. Select any criteria displayed and click View Students to see a list of all students matching the selected criteria.
3. View My Caseload
 - a. This button will only appear if a caseload has previously been established under Wizards→Caseload Setup Wizard.

4. Select a Student
 - a. This table is a result of the search criteria selected or may be the administrator caseload.
 - b. All students that meet the search criteria are displayed here.
 - c. This list displays basic student information including IEP dates, Eligibility, Disability, Teacher of Record, and Compliance information.
 - i. The first column reports the compliance status for the student.
 - ii. Click the Column heading CP to view a list of the symbols and definitions.
 - iii. Click any other column header to sort the list by that item.
 - d. To view the student's record in IIEP click the student's name.

Accessing the IEP

1. From a list of students click his or her name to view the IIEP records.
 - a. Select a reason for access then click Continue.
 - b. A series of blue menu items appear upon access. These grant access to student specific data and components of the Referral, Evaluation and IEP processes.
 - c. Walkthroughs for Teachers of Record and Multidisciplinary Team are available for a detailed description of these processes.

Eligibility – District Administrators Only

1. Click Students at from the green menu at the top of the page.
2. Search for a student by name or STN.
3. Click the student's name to access his or her special education records.
4. Only District Administrators may adjust the Eligibility information presented on a student's eligibility screen.
 - a. For all other user types, the information is presented in a read only format.
5. **Click Student Data from the blue menu at the top of the page and select Eligibility from the drop-down menu.**
6. This tab displays current Referral, Consent, Eligibility, and IEP dates. Disability Areas may also be adjusted on this page.
 - a. Normally these dates and disability areas merely reflect the selections and determinations of the case conference committee.
 - b. If the student is moving in from out of state or the records cannot be transferred in a timely manner, a district administrator may manually enter the information here. This will enable the case conference committee to initiate the move-in conference correctly.
7. Enter or adjust any date or eligibility area needed.
8. Click Update the Database.
9. Confirm Events screen opens.
 - a. Double-check the information displayed.
 - b. Check the box beside the item or items.
 - c. Click Update the Database to commit the change.

Student History – Administrators Only

1. Click Students at from the green menu at the top of the page.
2. Search for a student by name or STN.
3. Click the student's name to access his or her special education records.
4. Click Student History from the blue menu at the top of the page.
 - a. Student History is a list of all events in chronological order. Events are created for Referrals, Consent, Eligibility, IEPs, Transfers, Notices, and many other actions in IIEP.
 - b. Rights may be granted to any IIEP user to deactivate and manage these events.

5. To deactivate an event or events:
 - a. Click the checkbox beside the event or events.
 - b. Click Update the Database at the bottom of the page.
 - c. This moves the event to the Inactive Events table at the bottom of the page.
 - d. Deactivating an Event deactivates any associated documents as well.
6. To reactivate an event or events:
 - a. Scroll to the Inactive Events table at the bottom of the page.
 - b. Click the checkbox beside the event or events.
 - c. Click Update the Database at the bottom of the page.
 - d. The event or events appears in Student History in the correct order by the event date.
7. To adjust Event, Begin, or End Dates:
 - a. Edit the dates for any given event.
 - b. Click Update the Database at the bottom of the page.
 - c. The event date or dates change as entered
 - i. If the event date is changed the list order will change accordingly.

Documents

1. Click Students at from the green menu at the top of the page.
2. Search for a student by name or STN.
3. Click the student's name to access his or her special education records.
4. Click Documents from the blue menu at the top of the page.
5. Documents for <Student Name>
 - a. At the top of this page final or draft documents may be created provided the information has been entered into IIEP.
 - b. EasyFAX Coversheets created here may be used to scan documents into the student's record.
 - i. Print the coversheet.
 - ii. Fax the coversheet along with the document.
 - iii. The document will appear in the student's documents when the fax is received by PCG.
6. Upload External Documents
 - a. Browse the computer or network for the electronic document.
 - b. Enter a Name if needed.
 - c. Click Upload File(s)
 - d. The file will appear in the documents list.
7. Documents Created for <Student Name>
 - a. All documents created within IIEP and uploaded into the system appear on this list.
 - b. Click the name of the document to view the PDF.
 - c. To delete a document, click the box in the Del column.
 - i. Click Update the Database.
 - ii. Once deleted the file cannot be retrieved.
 - d. Files with a red "E" are tied to an event.
 - i. Deactivating the associated event will remove this file.
8. Manage Additional Document Text
 - a. Click Manage Additional Document Text to open a text field for each document.
 - b. This text field, when used, is added to the current document title.
 - i. This can be useful to differentiate files of the same name.
 - ii. Enter the additional title details and click Update the Database to confirm the addition.
9. Upload External Attachments
 - a. Click Upload External Attachments to open the Upload Attachments screen.
 - b. All current student documents appear in this table.

- c. Click the radio button beside the target file.
- d. Browse the computer or network for the electronic document.
- e. Enter a name if needed.
- f. Click Upload File.
 - i. The file appears next to the target file in the document list.
 - ii. This may be repeated for additional documents.
 - iii. These documents do not print with the IEP but help to organize the documents list.