

# **EASY IEP**

## **OVERVIEW**



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# PREFACE

This document was prepared by Public Consulting Group (PCG) Incorporated to help you understand how Easy Special Education software (IEP®) works. Detailed explanations and step-by-step help for Easy IEP® may be found in the Help System (see Section 11).

This “*Overview*” was prepared in concert with the “*Test Drive Handbook*” as a guide to the features and operation of Easy IEP®. Comments and suggestions are welcome and should be directed to PCG at:

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# INTRODUCTION

Easy IEP® is a complete tool for a School Systems' Special Education Program. It provides for the entry of the vast amount of data required to operate a compliant Special Education Program. It also creates required documentation such as the IEP, IEP Report Card, IEP Amendment, and letters. Easy IEP® addresses every facet of a School Systems' Special Education Program with a simple and consistent approach. This approach is based on four basic concepts: Internet Database, Users & User Types, Access and Permissions, and Lists. This "Overview" explain these basic concepts to allow new users to understand how their School Systems' version of Easy IEP® works. Before beginning the "Test Drive Handbook", you should complete the "Overview", as the two are prepared in concert to provide examples and definitions of the Easy IEP .

# 1 OVERVIEW OF EASY IEP®

Easy IEP® is flexible and very adaptable. Rather than force your School System to adapt to Easy IEP®, Easy IEP® adapts to your School Systems' Special Education Program. This "Overview" explains Easy IEP® and its' function through the Internet Database, Users & User Types, Access and Permissions, Lists, Documents, Reports, Help System, and Administrative Support. The following sections detail how Easy IEP® operates and how it can be adapted to fit your Special Education program.

## 2 INTERNET DATABASE

Easy IEP® stores the enormous amount of information required by a School Systems' Special Education Program in a central database. By storing all information in one central location, administrators can get up to the minute information including current and pass documents (IEPs, IEP Report Cards, etc.). Archiving these documents on the Easy IEP® server reduces the amount of paper that a School System must store. Since the Easy IEP® central database stores all dates associated with Special Education, it can keep up with important dates and alert teachers and administrators when they are getting close or passed. These include:

- Date that an eligibility decision must be made after the initial referral
- Date of first IEP after student becomes eligible
- Date of yearly IEP
- Date of three-year review of eligibility

Many older database systems require the user (client) to load a special client program to access the data on the system's server. This system creates many problems and additional work because each new version of the software must be accompanied by new client software that has to be installed by the user. In addition, users change operating systems often find that client software is not available for their new system. Easy IEP® uses an Internet database system as shown in Figure 1.

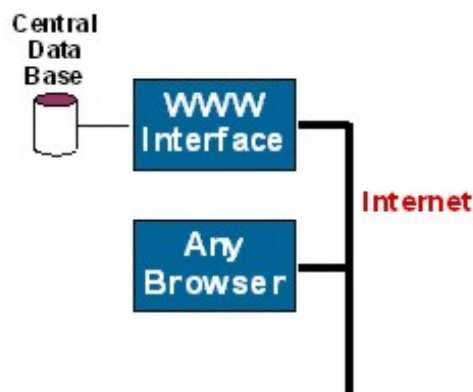


Figure 1 - Internet Database Architecture

Since any computer with a browser may access the Easy IEP® forms, letters, and reports; administrators and teachers are not forced to learn a new operating system. Macintosh users can continue using Macintosh, Windows users can continue using Windows and UNIX users can continue using UNIX.

In the Internet Database Architecture, the user's Web browser is used to connect to the Easy IEP server via the Internet. This approach has many advantages including:

- No Client software to distribute and maintain

- Work at school, home, or anywhere that has a computer connected to the Internet

- Minimal to no School System support staff required

- No server system administrator needed

- Backups done by PCG®

- New features are added to the entire system by modifying the Server

- Only the Server needs to be modified to correct problems

- Browser software is free

Generation and printing of documents and reports are done efficiently. Each School System may specify the custom "look" of their documents. This maintains the look that parents and teachers are accustomed to seeing.

### **3 USERS AND USER TYPES**

Users are School System personnel that will "use" Easy IEP® to enter information and manage the School Systems' Special Education Program. Each user is given a unique user Account. User Accounts are most often the name of the user. Easy IEP® supports first, middle, and last names along with a suffix (Jr., III, etc.). Only the last name is required.

Each user is assigned a user type. There is no limit on the number of user types a School System may require. User types may include:

- School System Administrator

- School System Staff

- School Administrators/Coordinator

- Teacher of Record (Case Manager)

- Clinician (Therapist, Physiologist, etc)

Access to the Easy IEP® database areas is controlled by a set of Permissions (see Section 5). A different set of Permissions may be assigned to each user Type. This flexibility allows Easy IEP® to be set up to match a School Systems' management and operational procedures.

In order to control unauthorized access to Easy IEP®, each user is also given a password. Passwords should be easy to remember, but hard to guess. To access Easy IEP®, a user "points" his or her browser to the Easy IEP® server. This takes the user to the Login Page. Figure 2 shows the Login Pages Account and Password Text Boxes.

The image shows a login interface with two text input fields. The first field is labeled 'Name:' and the second is labeled 'Password:'. To the right of these fields is a button labeled 'Login'.

Enter your account name and password then press the Logon button to access your account.

Figure 2 - Easy IEP Login Account Name and Password Text Boxes

Once the users' Account Name and Password are entered, the user clicks on the Login button to complete the Login process.

## 4 ACCESS

Access allows for control of the user's ability to create, edit, or view Student and School System information in Easy IEP . User's access is granted and controlled by the School Systems' administrative structure. Table 1 illustrates a possible scenario for a School Systems' user types (left hand column) capability to create and edit user types (top row). PCG will work with the School System to ensure their management policies and procedures are form fitted for each user type.

Possible Accesses for a School Administrator's for editing or viewing Student Pages are outlined in Table 2. A Teacher's access for editing or viewing Student Pages may include edits or views as outlined in Table 3. These tables, along with Tables 4 and 5 under Permissions, outlines an example School System.

Control of Permissions and Accesses will ensure Easy IEP maintains all data required and is in accordance with your School Systems' policies and procedures.

Table 1 - Assigning User Access

	SCHOOL SYSTEM ADMINISTRATOR	SCHOOL ADMINISTRATOR	TEACHER OF RECORD	SCHOOL SYSTEM STAFF
School System Administrator	Yes	Yes	Yes	Yes
School Administrator	No	No	Yes	Yes
Teacher	No	No	No	No
School System Staff	No	Yes	Yes	No



**Table 2 - School System Administrator Accesses**

<b>STUDENT AREA</b>	<b>IEP Team Member</b>	<b>IEP Team Member (View only)</b>	<b>No Direct Assoc. With Students</b>
Personal Info	Edit	View	Edit
Parents/Guardian	Edit	View	Edit
Eligibility	Edit	View	Edit
IEP Team	Edit	View	View
Narratives	Edit	View	View
Assessments	Edit	View	View
Accommodations	Edit	View	View
Goal & Obj	Edit	View	View
Services	Edit	View	View
Transition Plan	Edit	View	View
Transition Services	Edit	View	View
Documents	Edit	View	View

**Table 3 - Teacher of Record (Case Manager) Accesses**

<b>Student Area</b>	<b>Teacher of Record</b>	<b>IEP Team Member</b>	<b>IEP Team Member (view only)</b>	<b>No Direct Assoc. with Students</b>
Personal Info	Edit	Edit	View	None
Parent/Guardian	Edit	Edit	View	None
Eligibility	Edit	Edit	View	None
IEP Team	Edit	Edit	View	None
Narratives	Edit	Edit	View	None
Assessments	Edit	Edit	View	None
Accommodations	Edit	Edit	View	None
Goals & Obj	Edit	Edit	View	None
Services	Edit	Edit	View	None
Transition Plan	Edit	Edit	View	None
Transition Services	Edit	Edit	View	None
Documents	Edit	View	View	None

## 5 PERMISSIONS

Permissions allow Easy IEP® to be matched to any School Systems' management policies and procedures. Permissions are assigned to user types and control a users' access to the School Systems' Easy IEP® data. Permissions have two parts, Type and Extent. The Permission Type controls the areas of the database a user can view and edit (Student Personal Information, Student IEP Information, User Information, etc.). The Permission Extent controls the scope of the users' access (how much of the particular type of data). For example, an administrator's extent for editing Student Personal Information may include all students in the database. A teacher's extent for editing Student Personal Information may include only the students on his or caseload. Table 4 shows the Permission Types along with their Extent for the School System Administrator in the Easy IEP® Test Drive School System.

To illustrate how Permissions may be used to match a School Systems management policies and procedures, we will look at two School Systems: a small system and a medium system. In the small system, all management of the Special Education Program is handled at the central office. This includes assigning Teacher of Record (Case Manager) caseloads, adding new students, and managing all student records. In the medium system, some management responsibilities are delegated to an administrator in each school. Both systems have a School System Administrator and Teacher of Record (Case Manager) user type (see Tables 4 and 6 for examples). The medium school system requires an additional user type, the School Administrator. The School Administrators are delegated some administrative responsibilities (assign Teacher of Record (Case Manager) caseload, add new students), but their extent is limited to their own school. By adding user types as needed, Easy IEP® can be matched to any administrative structure.

For each Permission Type, the user type is assigned a Permission Extent. The Permission Extent controls the range or scope of the permission (who or what can be accessed). Each user is assigned to one or more schools and one or more grade levels. The assigned school(s) and grade level(s) along with the Permission Extent allows for complete control of each user's access to Easy IEP® data. For example, for each Permission Type, the user type is assigned a Permission Extent. The Permission Extent controls the range or scope of the permission (who or what can be accessed). Each user is assigned to one or more schools and one or more grade levels. The assigned school(s) and grade level(s) along with the Permission Extent allows for complete control of each user's access to Easy IEP® data. For example,

An administrator for the preschool program may be given access to only students in the preschool grade.

An administrator for the middle schools may be given access to only the students in the middle schools.

A transition coordinator for two high schools may be given access to the students in the two high schools for grades 10, 11, and 12.

**Table 4 - Permissions for School System Administrator in Test Drive School System**

<b>Permission Type</b>	<b>Permission Extent</b>
Login	Yes
Edit School System Information	Yes
Add New School	Yes
Edit School Information	Any School
Delete School	Yes
Add New users	Any School
Edit users Information	Any users
Delete users	Any School
Change users Password	Any users
Student Access	Any Student
View Draft Documents	Any Student
Assign Student to School	Any Student
Assign Teacher of Record to Student	Any Student
Make Student Inactive	Any Student
Add Student	Any Student
Edit "Message of the Day"	Yes
Increment Grades	No
Generate Reports	Any School
Manage Inactive Students	Any School
Log Service Hours	Any Student
View Service Log	Any Student
Assign Service Disability	Any Student

Table 5 shows the extent selections for areas of Easy IEP

**Table 5 - Extent Selections for Different Areas of Easy IEP**

<b>School System</b>	<b>School</b>	<b>User</b>	<b>Student Information</b>
Yes/No	Any School	Any User	Any Student
	Own School(s)	users at Own School(s)	Students at Own School
	No access	No access	Own Students
			No access

Note: Own School refers to the schools assigned to the user, Own Student refers to students assigned to the users' caseload.

The following example further illustrates how Easy IEP® Permissions can be set up to adapt to a school systems' operational procedures and rules. Tables 4 and 6 show the

Permissions for two user types (School System Administrators and Teachers of Record {Case Manager}) in the Easy IEP® Test Drive School System.

The School System Administrator has permission to view and edit the personal information of all students in the School System and may view students' IEP information and generate draft documents. However, a School System Administrator cannot edit IEP information or create a final document (IEP, etc.). With these Permissions, School Systems Administrators are given visibility to all students in the system, but the final control of the IEP information and generation of the final IEP document is reserved for the Teacher of Record (Case Manager). The Teacher of Record (Case Manager) may view and edit personal information for students assigned to them (on their caseload). They may also view and edit their students' IEP information and generate final and draft documents.

To configure the Permissions appropriately for your School System, PCG will discover the operational policies of your system via conversations and/or a questionnaire. PCG will then configure the Permissions to match your School System procedures. Refinements to the Permissions may be made at any time.

**Table 6 - Permissions for Teacher of Record (Case Manager) in Test Drive School System**

Permission Type	Permission Extent
Login	Yes
Edit School System Information	No
Add New School	No
Edit School Information	No
Delete School	No
Add New users	No
Edit users Information	Own users Information
Delete users	No
Change users Password	Own users Information
Add New Student	No
Access Student Data	Own Students
View Draft Documents	Own Students
Make Student Inactive	Own Students
Increment Grades	No
Generate Reports	Own Students
Manage Inactive Students	Own Students
Log Service Hours	Own Students
View Service Log	Own Students
Assign Service Disability	Own Students

## 6 LISTS

Lists allow Easy IEP® to be matched to a School Systems' Special Education Program. All aspects of the IEP process are derived from lists. Easy IEP® lists are placed on the data input screens as drop-down lists and check boxes. Each School System has its

own set of Lists. This allows each School System to have its own custom version of Easy IEP® without the expense of having a custom program written. There are two basic types of Lists: Dynamic and Static.

## **6.1 DYNAMIC**

Dynamic Lists are derived from information entered on data input screens. As the name suggests, they change frequently. Permission to modify Dynamic Lists is associated with each list. Therefore, a user may have permission to modify (add, edit, delete) one of the Dynamic Lists but not another. Dynamic lists are divided into three categories: Students, Users, and Schools. Each of these is explained in detail in the “Test Drive Handbook”.

## **6.2 STATIC**

Users with the appropriate Permission manage Static Lists via the Lists menu selection on the School System Menu. As the name implies, Static Lists do not change as often as the Dynamic Lists. Static Lists are divided into two types: Simple and Categorized. These are explained in detail in the “Test Drive Handbook”.

PCG will work with the School System to populate these lists with entries that will match their system’s operations. Any number of narratives may be included in the “Narrative Types” list. If a new narrative is required at a future date, it may be added. Once this is done, it will appear as one of the narrative choices.

# **7 CUSTOM DOCUMENTS**

All documents (IEP, IEP Report Card, Amendment to IEP, Letters, etc.) produced by Easy IEP® may be customized to the School System. Customization includes what information from the Easy IEP® database is placed on the document, the location of the information, and its format (Font, size, style). Therefore, a School System may have their Easy IEP® documents look exactly like their current documents or choose a new style.

# **8 IEP TEAM**

The concept of an IEP Team to develop a Special Education students’ IEP plan is required by the IDEA 97 law. Most Special Education administrators agree that the team approach has many advantages. Easy IEP® supports the IEP Team concept by allowing the Teacher of Record (Case Manager) to identify IEP Team members. One of a user type’s Access Permissions is “Can be Member of IEP Team”. This allows Therapists/Clinicians, Administrators, and others that may not be a Teacher of Record (Case Manager) to be on the IEP Team.

When the Teacher of Record (Case Manager) selects an IEP Team member that has a Easy IEP® account (another user), he or she may assign the new IEP Team member permission to view students’ IEP information. If the Teacher of Record (Case Manager) has a “trusting relationship” with the new IEP Team member, he or she may also grant permission to edit students’ IEP information. For example, if a Teacher of Record (Case Manager) gives a Therapist/Clinician edit permission for a student, the Therapist /Clinician may add Assessments, Goals & Objectives, Services, etc. directly. Since generally only the Teacher of Record (Case Manager) has permission to generate the final IEP document, he or she has the final approval of the IEP information. Allowing

IEP Team members permission to edit IEP information simply saves the Teacher of Record (Case Manager) from having to enter IEP Team members' information







## 9 TRACKING IMPORTANT DATES

When a user selects *Students* from the *Main Menu*, he or she is provided with an appropriate list of students as shown in Figure 3. As documented in Section 4, the list of students displayed on the Student List Screen is controlled by the user's Group Permission, assignment of Teacher of Record (Case Manager), and IEP Team membership.

The symbols in Figure 3 show at a glance if the student has missed an important date. Figure 4 documents the different missed and approaching dates indicated by the symbols on the Student List Screen.

	Last IEP	School	Grade	Name	Student ID	Age	Dis	Teacher
✓	Oct 22 1999	HS	10	<a href="#">Benjamin Howard Lane</a>	29629	15	SLI	Thomas Farley
✓	Oct 22 1999	HS	10	<a href="#">Calvin Cecil Thomas</a>	59960	15	SLI	Thomas Farley
✓	Nov 8 1999	HS	12	<a href="#">Benjamin Palmer</a>	87658	17	SLD	Thomas Farley
✓	Oct 22 1999	HS	12	<a href="#">Roger Barry Sheppard</a>	51959	17	SLD	Thomas Farley
⚠	Sep 10 1999	HS	12	<a href="#">Michael Albert Stone</a>	36932	17	SLD	Thomas Farley
✓	Apr 26 1999	HS	10	<a href="#">Benjamin Dickens</a>	24349	15	OHI	Woodrow Farley
⊘	Sep 13 1999	HS	10	<a href="#">George Michael Martin</a>	94683	15	EMR	Woodrow Farley
⊘	Jan 1 1900	HS	11	<a href="#">Samuel Forbes</a>	88806	16	SLD	Woodrow Farley
⊘	Sep 13 1999	HS	11	<a href="#">Steven Kinney</a>	15591	16	SLD	Woodrow Farley
⊘	Dec 13 1998	HS	11	<a href="#">Dennis Stewart</a>	29980	16	SLI	Woodrow Farley
⚠	Apr 20 1999	HS	12	<a href="#">Howard Haynes</a>	83523	18	SLI	Woodrow Farley
⊘	Dec 13 1998	HS	12	<a href="#">James Lilly</a>	98336	17	DD	Woodrow Farley
✓	Apr 26 1999	HS	12	<a href="#">Allen Worrell</a>	84088	17	DD	Woodrow Farley
✓	Nov 15 1999	HS	10	<a href="#">Howard Chaffin</a>	63513	15	SLD	Keith Lyons
✓	Mar 10 1999	HS	10	<a href="#">Jeff Hamilton</a>	95681	15	SLD	Keith Lyons
✓	Apr 27 1999	HS	11	<a href="#">Cecil Chaffin</a>	52859	16	SLD	Keith Lyons
⊘	Jun 11 1999	HS	12	<a href="#">William Cooke</a>	78619	19	SLI	Keith Lyons
✓	May 12 1999	HS	10	<a href="#">William Alderman</a>	12496	15	SLD	Barry McCoy
✓	Apr 14 1999	HS	10	<a href="#">Barry Dickens</a>	44528	15	SLI	Barry McCoy
✓	Apr 14 1999	HS	11	<a href="#">Roy Cooke</a>	24276	16	SLI	Barry McCoy
✓	Feb 7 1999	HS	11	<a href="#">Fred Gary Kinney</a>	4522	17	SLI	Barry McCoy
✓	Apr 21 1999	HS	11	<a href="#">Dennis Stewart</a>	29980	16	SLI	Barry McCoy

Figure 3 - Easy IEP Student List Screen

Symbol	Meaning
	It has been > 1095 days (3 years) since this student's Eligibility Date (i.e. a triennial re-evaluation is due)
	It has been > 1035 days since this student's Eligibility Date (i.e. a triennial re-evaluation is due within 2 months)
	Either 1) it has been > 365 days since this student's Last IEP Date, or 2) it has been > 30 days since this student's Eligibility Date and no IEP has been recorded (i.e. the student's Last IEP Date field is empty).
	Either 1) it has been > 335 days since this student's Last IEP Date, or 2) it has been > 23 days since this student's Eligibility Date and no IEP has been recorded (i.e. the student's Last IEP Date field is empty).
	It has been > 97 days since this student's Referral Date and Eligibility has not yet been determined.
	It has been > 77 days since this student's Referral Date and Eligibility has not yet been determined.

**Figure 4 - Symbols that indicate Approaching or Missed Dates**

## 10 REPORTS

PCG is constantly adding reports to Easy IEP to assist administrators in managing their special education program. We welcome suggestions for new reports and improvements to the existing reports. Some of the Easy IEP reports available are:

- Active Student List Reports
- Inactive Student Listing Report
- Projected IEP Meetings Report
- Projected Eligibility Meetings Report
- Service Log Report
- Parent/Guardian Mailing Label Report
- Special Transportation Report
- Special Equipment Report.

All reports are addressed in more detail in the "Test Drive Handbook".

### HELP SYSTEM

Easy IEP®'s Help System has been developed to assist you with learning Easy IEP® and to answer your questions. The Help System includes:

- Overview of Easy IEP®
- Step-by-Step Help
- Page Help
- Page Component Help

All of the Easy IEP® menus include a Help section. Click on the Help button to access. The Help section includes an “Overview” of Easy IEP®, How to do an IEP (step-by-step), How to ●● instructions for administrative and teacher tasks, and links to Special Education web sites.

Each page in Easy IEP® includes help instructions for the page. To access, click on the page help icon (📖) beside the page title. Help is also provided for each item on the page. To get help for an item on a page, click the “\*” or “?” beside the item. The “\*” also indicates that the item must be filled in or selected before the information can be accepted. For example, you cannot add a student to Easy IEP® with the students name blank.

## 11 MESSAGE OF THE DAY

The Message Board Page (first page you see when you login) provides e-mail links to contact PCG for Questions, Bug Reports, Comments, and Suggestions. This page has three sections:

- “Send us a Message” Area
- PCG Message Area
- School System Message Area

You may send a Question, Bug Report, Comment, or Suggestion to the Easy IEP Help Desk at PCG via the four links at the top of the Message Board page. PCG will place system messages, update notices, alerts, hints, and other system information in PCG Message Area. Users with permission may add and/or edit the Message of the Day in the School System Message Area. These messages might include announcements of deadlines or events, new procedures, new staff, or any other pertinent School System information

## 12 AMOUNT OF SERVICE

One of the major changes in Easy IEP Version 2.1 is the tracking of service time. In Version 2.1, time is stored directly (in minutes) and can be specified in whatever units your School System desires. The service time (Time Spent) is now specified as shown in Figure 5.

Del ?	Special Ed Service *	Time Spent		Pct	?	?
<input type="checkbox"/>	English: Average	3	pd per wk	8.57	Details	Log
<input type="checkbox"/>	English (general)	1	pd per wk	1	Details	Log
<input type="checkbox"/>	Academic Lab	4	pd per wk	11.43	Details	Log

Figure 5 - Service Time Entry Interface



Users may specify the amount of time, time units, and “per” time period. In Figure 5, there are 3 periods of English per week. The percentage of time is calculated by knowing the time length of each period.

A “Service Frequency” variable has been added to track the number of sessions for a service. The frequency of Service is entered separately as shown in Figure 6.

Frequency of Service:  session(s) per  ?

**Figure 6 Service Frequency Interval Variable**

This allows users to specify the frequency of services. For example, if the Service Time is 3 hours per week, the Frequency may be 6 times per week or 12 times a month. Notice that this does not restrict the School System to equal sessions. If it is appropriate, a session may be 30 min. one day, 45 min. the next day and 15 min. the next day. Since the IEP is a binding document, flexibility is paramount. This new specification leads to new opportunities for reporting services on the IEP document. Table 7 shows the current Service Table.

**Table 7 - Current Service Table**

Special Education And Related Services	Amount Of Services		Duration		Location Of Services
	Units	%	Begin.	End	
Sample Service 1	2	10	12/15/1998	12/15/1998	Inclusion
Sample Service 2	1	5			Inclusion
Sample Service 3	3	15			Inclusion

This table is not usable unless your School System restricts its users to selecting a single unit of time measurement for each school. Removing the “Units” column may modify the table.

Another possible approach is to list the information in a session format as shown in Table 8.

**Table 8 - Service Time and Sessions**

Type of Service	Sessions		Amount of Time			Location of Services
	No	Per	Amt	Units	per	
Sample Service 1			.			Inclusion
Sample Service 2						Inclusion
Sample Service 3						Inclusion

Table 9 shows the Amount of Time in blocks/week of Services and their duration as well as all the information without “over specifying” and restricting the School System. Since the Duration of the service is also tracked, this may be specified as well

**Table 9 - Service Time and Duration**

Special Education and Related Services	Amount of Time	Duration		Location of Services
		Begin	End	
Sample Service 1	2 blk/wk	12/15/1998	12/15/1998	Inclusion
Sample Service 2	2 blk/wk			Inclusion
Sample Service 3	2 blk/wk			Inclusion

This system is very flexible. PCG will be able to match any existing requirements, but quickly adapt to any document changes.