

SELPA SEIS Trainer of Trainers Agenda  
September 28, 2011

Trainers: Linda Chase, SBCEO IEP Chairperson  
Deby Geiger, SBCEO Spec. Ed. Coordinator

1. Welcome and Introductions
  - a. Purpose/Goals of training
  - b. Index cards
2. Introduction of participants
  - a. Name
  - b. District
  - c. Position
  - d. SEIS Responsibilities
3. What's New
  - a. Services (blue handout)
  - b. Amendments and attachments (handout)
  - c. PWN
  - d. When to delete old goals
  - e. File Review Checklist (yellow handout)
  - f. SEIS desk card (cardstock handout)
4. Commonly Made Mistakes (pink handout)
5. Home Page Review
  - a. Home page checklist (handout)
  - b. Emailing other users
  - c. Adding Students/Transfers
  - d. Custom Searches (handout)
6. Additional Instruction
  - a. Goals/goal banks
  - b. Affirming Progress Reports
  - c. News Items (handout)/Tips of the Week

## SEIS Commonly Made Mistakes

September 2011

(\*\* indicates newly added information)

### A. GENERAL ERRORS

1. **SPELLING ERRORS:** Please be professional, remember this is a legal document. Check both spelling and grammar. There is built-in spell check in every section in which you write. There is no excuse for making spelling errors.
2. **THE SPACES FOR TYPED INFORMATION ARE LEFT BLANK:** Please take the time to fill in all blank spaces. While the blanks may not come up as a CASEMIS Error they will come up as a compliance error when we have our state reviews. Every section of the IEP forms is required by either the state or the feds under IDEA/NCLB.

### B. SEIS REQUESTS TO ADD STUDENTS

1. **USE OF NICKNAMES:** Please make sure when you request a student on SEIS that you provide us with the student's legal name. This will help us to avoid adding duplicate students.
2. **For District staff adding students:** Do your search several ways, checking last name and birthdate, last name and first name, etc. to avoid duplicating existing records. Sometimes staff does not submit the correct information on their requests. \*\*
3. **NO DISTRICT OF RESIDENCE INDICATED:** Please make sure you write in the district of residence in your request to add a student.

### C. INFORMATION/ELIGIBILITY PAGE or CASEMIS A TAB UNDER EDIT STUDENT

1. **PURPOSE OF MEETING IS NOT CHECKED:** Please check the appropriate box(es).
2. **EL INFORMATION IS INACCURATE OR LEFT BLANK:** Please complete this section. Remember that if the native language is other than English based on the home language survey, the student must be marked as EL Yes. If they have been "redesignated" by the LAT Team and you have been notified of that, the box that says redesignated must be checked. Complete the box that indicates is an "interpreter" (i.e., translator) was used at the IEP meeting.
3. **ELIGIBILITY SHOWS ONLY ONE ELIGIBILITY CATEGORY:** You must indicate Primary and Secondary. The secondary eligibility may say NONE.
4. **DATES NOT COMPLETED OR NOT ACCURATE:** We continue to find referral, consent and assessment dates to all be one in the same or to be left blank. Just because information appears in the section at the bottom of the Information/Eligibility page does not mean the data is accurate.
5. **DATES FOR INFANT SERVICES ARE ENTERED AS OVER 3 YEAR OLD DATES:** Remember infant providers, that if your student is under the age of 3, the infant referral, consent, and assessment data must be filled in. And remember when the student transitions to preschool services, the referral, consent and assessment data must be completed in the 3 or over section of CASEMIS TAB A.

#### D. PRESENT LEVELS PAGE

1. **PRESENT LEVELS ARE OUT OF DATE:** Please update the test score section on STAR Tests results annually and all other required assessments for special education triennially.
2. **FOR CLARITY:** When entering data in each section (e.g. Gross/Fine Motor, Communication Development), type in the date that you're entering the information and delete old dates and information, unless that information is still a "present level".

#### E. SPECIAL FACTORS PAGE\*\*

1. **LOW INCIDENCE:** Only allowed for students with DB, VI, OI, HH, Deaf disability categories. Address the specific equipment in supplemental aids/services &/or goals
2. **EL SECTION:** Team must address EL services/specific instructional strategies
3. **BEHAVIOR:** If the team discusses behavior, this section must be addressed, even when no classroom support plan is required.
4. **AREAS of NEED:** Addresses ALL areas of need discussed in reports and present levels. If the student is taking CMA in any subject area, a goal must address that curriculum area.

#### F. STATEWIDE ASSESSMENT PAGE

1. **STAR TEST INFORMATION IS MISSING:** Unless the student is out of age range, please complete the accommodation/modification information for each subsection of the STAR even if you know the student will not take that specific subsection that year. Enter it as though the student were going to take each subsection.
2. **STAR TEST ACCOMODATIONS/MODIFICATONS ARE NOT ACCURATE:** Some people have defaulted to accommodations for all subsections of the STAR Test. Remember that a student may receive accommodations for one section and not for another or a student may receive accommodations for one section and modifications for another. Please look at the TEST MATRIX to verify the level of support needed for each subsection. Remember that the accommodations/modifications provided to the student must match the student's needs and what the student receives through typical instruction. Do not add modifications lightly, it will automatically throw the student out of the proficient level.
3. **CMA or CAPA CHECKLIST:** If the student has been determined to not progress or cannot access the STAR test, the team must complete the CAPA (for SH students) or CMA checklists to determine if those are appropriate. These completed checklists are included in each IEP and attached on SEIS. \*\*
4. **CAHSEE INFORMATION IS MISSING (write this information in under Other State-Wide assessments to take AND enter info in under EDIT STUDENT/ CASEMIS A, A-52-54):** Unless the student is below grade 9, this information must be completed for all students indicating either that they are taking the CAPA or that they will participate (with or without accommodations/modifications).
  - a. Remember that even if the student is a 12<sup>th</sup> grader or older, and they have not passed the CAHSEE, they must be given opportunity to prepare and take the CAHSEE for two additional years, so complete this information for students who are over 18.

- b. If the student has already passed the CAHSEE, in order to avoid a CASEMIS error, please fill in what level of support they were provided when they did take the test.

#### G. GOALS PAGE\*\*

1. **NO PROGRESS REPORTS ARE INCLUDED:** Progress on goals should be completed as often as it is specified on the educational setting page (and as often as general education peers progress is reviewed)
2. **PROGRESS REPORTS ARE DONE BUT NOT AFFIRMED:** The Case Manager should affirm the PR after all providers enter progress on all goals.
3. **BASELINE INFORMATION MISSING OR INCOMPLETE:** Baseline information should be specific for each goal and contain data obtained to determine goal levels.
4. **CHECK BOXES under each GOAL:** Make sure that all appropriate boxes are checked. If student is EL, must have at least one **LINGUISTICALLY APPROPRIATE** goal. If student is 15 ½ or older, must have **TRANSITION** areas checked on goals.

#### H. SERVICES PAGE

1. **CONSULT SERVICES ARE PUT IN THE SECTION WHERE DIRECT SERVICES ARE LISTED (down below) RATHER THAN IN THE SUPPLEMENTARY AIDS AND SERVICES SECTION (up top):** Unless the consult service is a stand alone – only service, all consult services are to be listed under Supplementary Aids and Services with accurate duration and frequency listed.
2. **DUPLICATE SERVICES ARE ENTERED:** Remember that a specific service can only be listed one time.
  - a. If the student receives group and individual speech or APE, simply detail that with the minutes in the comments just below the service.
  - b. If the student receives a service from us and then next year will receive the service from a different district, include both, but DNR (Do not report) the service provided by the Other District, County, or SELPA.
  - c. Also be aware that SEIS allows duplicate services to be recorded on the IEP, but CASEMIS does not allow duplicate services to be reported. A duplicate service is one:
    - i. With a duplicate Service Code
    - ii. Is recorded in the same fiscal year, and
    - iii. Has the same Provider agency
    - iv. Teachers often need the flexibility to list a service more than once. If the duplicate services are in different fiscal years, such as for transition IEPs, the upcoming year's services will not be pulled for CASEMIS. Duplicate services will need to be marked Do Not Report (DNR) to avoid duplicate service errors.
3. **BLANK SERVICES:** CASEMIS will not allow blank service lines. Make sure that you delete these.
4. **PRIMARY SERVICE IS NOT ACCURATE:** the services must be listed in order of priority – that service that is most important for the educational benefit of the student must be in listed first. You may change the order of services by changing the number directly to the left of the service (drop down list of 1,2,3,etc)

5. **TRANSPORTATION BUTTON IS NOT SELECTED:** Please make sure you have filled this in. It will help our office staff know who needs to be on a transportation list.

#### I. EDUCATIONAL SETTING PAGE

1. **ERRORS IN LOCATION, FEDERAL SETTING, PRESCHOOL SETTING, LOCATION:** please check for accuracy.
2. **PERCENTAGE OF TIME IN AND OUT OF REGULAR CLASS IS LEFT BLANK OR NOT CHANGED TO FIT A NEW SETTING OR LEVEL/TYPE OF SERVICE:** Please check for accuracy, do not leave anything blank. Write your justification for why time out of regular class.
3. **ACTIVITIES TO SUPPORT TRANSITION LEFT BLANK:** If the student is making any kind of transition the next academic year, please address this here.
4. **ERRORS IN GRADUATION PLAN:** Not all students are on a diploma track, please check for accuracy.

#### J. TEAM MEETING NOTES PAGE

1. **THERE IS MORE THAN ONE NOTES PAGE OR A BLANK TEAM MEETING NOTE:** Do not leave blank notes on an IEP. Have just one team meeting note per IEP. Delete the previous year's notes page.
2. **TEAM MEETING NOTES HAVE TO DO LISTS AND THOSE TO DOS ARE NOT DONE:** It is critical that the case manager review the items that are detailed that need to be done – e.g., new assessment, additional goals, changes to reports, parent requests for services, and complete those items and document their completion in some fashion. If there is a question about how to address a documented request, please contact your coordinator.

#### K. TRANSITION PAGES\*\*

1. **STUDENT IS 16 or TURNING 16 AND THE TRANSITION PLAN ON SEIS IS NOT FILLED OUT:** Transition plans are a required part of an IEP and must be in place prior to the student's 16<sup>th</sup> birthday.
2. **COURSE OF STUDY and TRANSCRIPT:** Must be part of student's IEP and attached in SEIS.

#### L. OTHER THINGS RELATED TO CASEMIS SIDE/BLUE SIDE/EDIT STUDENT SIDE

1. **DEMOGRAPHICS TAB: SDC STUDENTS ARE NOT INDICATED:** Just below Current Grade there is a button that says SDC Yes, No. If SDC click Yes, if not SDC click No. Remember that SDC means 50% or more of the student's day is supported by special education regardless of the location.
2. **CUSTOM TAB: INFORMATION IS NOT COMPLETED:** we must have the following information. Please check for accuracy and completeness.
  - a. Birth Country
  - b. First Year Enrolled in US School
  - c. For EL Students: Date Reclassified RFEP
  - d. Free and Reduced Lunch
  - e. Parent Ed Level
3. **CASEMIS B (SERVICES) TAB: PROVIDER CHANGES:**

- a. When you are ceasing to become a service provider for a student or the case manager, please put in the date which that goes into effect in the "end" box.
  - b. When you are involved in doing new assessment and may become a new provider or a new case manager, add yourself as a provider but do not delete other providers until that change goes into effect
4. **CASEMIS A TAB: STUDENT IS TO BE EXITED:** Please fill in the exit and reason for exit date before you send the request to exit/transfer/change form through SEIS. Make sure you also check and fix CASEMIS errors.

**\*\*\*Disclaimer:** The above information was developed by the Santa Barbara County Education Office for their use and may not reflect specific policies utilized in all Districts within the Santa Barbara County SELPA.

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## ~Suggested SEIS Desk Card ~

### Caseload Management

- Use the link on the vertical menu bar labeled **"Student Change Form"** to request a service provider change, remove a student from your caseload, change the eligibility status of pending student, or request another change to a student's status.
- Click on **"Student Change Form"** – Select a student's name – choose the appropriate request – and type in an explanation for the change.

- To add a new student to your caseload (initial referral or administrative transfer student), use the link on the vertical menu bar labeled **"Add Student Form"**. The name submitted must be the child's legal name. Make sure that the birthdate is correct and entered accurately.

### Updating Pending Students

#### If a student was assessed and did not qualify for services:

- The student's record must have the following information:
  - On the Demographics tab – ethnicity, birthdate, native language, residential status, parent/guardian information; be sure to copy the street address to the mailing address or enter a correct mailing address.
  - On the CASEMIS A tab – Fields A-1 through A-32 must be completed (fields A-22 through A-25 apply to infants).
- Use the **"Student Change Form"** and select **"Change Eligibility Status of Pending Student"**.
- You do not need to affirm the IEP for students who do not qualify after an initial assessment.

#### If a student was assessed and did qualify for services:

- On the Demographics tab – ethnicity, birthdate, native language, residential status, parent/guardian information; be sure to copy the street address to the mailing address or enter a correct mailing address.
- Check the CASEMIS A and CASEMIS B tabs for errors and correct all that appear.
- Use the **"Student Change Form"** and select **"Change Eligibility Status of Pending Student"**.
- Once the student's eligibility is changed to eligible, the affirm link will appear.
- Affirm/Attest the IEP – see **Affirming/Attesting an IEP** for further information.

**If a student was added to SEIS and is still identified as pending but no assessment took place, contact your district's special education director to have the student's record removed from SEIS.**

### Affirming/Attesting an IEP

- All IEPs should be affirmed/attested within seven (7) days of offering a "free and appropriate public education (FAPE)".
- The original copies of the IEP, assessment plans, meeting notice, reports, and assessments are the legal documents and should be placed in the student's confidential file per your district's policy.
- Reports and assessments may be uploaded and attached to the IEP after it has been affirmed/attested.

## ~Suggested SEIS Desk Card ~

### Affirming/Attesting an IEP (cont'd)

#### If Parent(s) refuses to sign IEP:

- The IEP should be affirmed/attested within seven (7) days of offering FAPE.
- When the parent(s) signs the IEP, if no changes were made to the document, edit the affirmed/attested current IEP's comments section (located at the top of the current IEP page for the student) indicating the date the parent(s) signed the IEP and that no changes were made to the IEP.
- When the parent(s) signs the IEP, if changes were made make those on the FUTURE IEP, save the form(s) as pdf and attach to the CURRENT IEP . Make a note in the Comments section to explain what took place and delete the pdf files from your desktop. Use Addendum if appropriate.

#### If a parent wishes to continue an IEP meeting at a later date:

- If FAPE was offered during the IEP meeting, the document should be affirmed/attested within seven (7) days of the offer.
- When the IEP meeting reconvenes, select the "future" IEP when preparing to add information to the IEP document. On the Information/Eligibility page, check the box labeled "other" for purpose of meeting and indicate "continuation of meeting dated xx/xx/xxxx".
- Within seven (7) days of this new offer of FAPE, affirm/attest the document.

**Note: It is acceptable to have more than one affirmed copy of an IEP in SEIS.**

### Exiting a Student

#### Exiting from specific service – continuing with an IEP

- Note service end date on Services page of IEP.
- Submit a student change request in SEIS to have student removed from your caseload.
- Do not remove service from student's record until after June 30<sup>th</sup> of that school year.

#### Exiting from all services – no longer eligible

- Note service end date on Services page of IEP.
- Check the box "exiting from special education" on the Information/Eligibility page.
- Do not remove services or disability from IEP document .

**The primary and secondary disability and all services/dates/frequency/total minutes/location MUST NOT be deleted or changed in SEIS until after June 30<sup>th</sup> of the school year.**

### Weekly To Do List

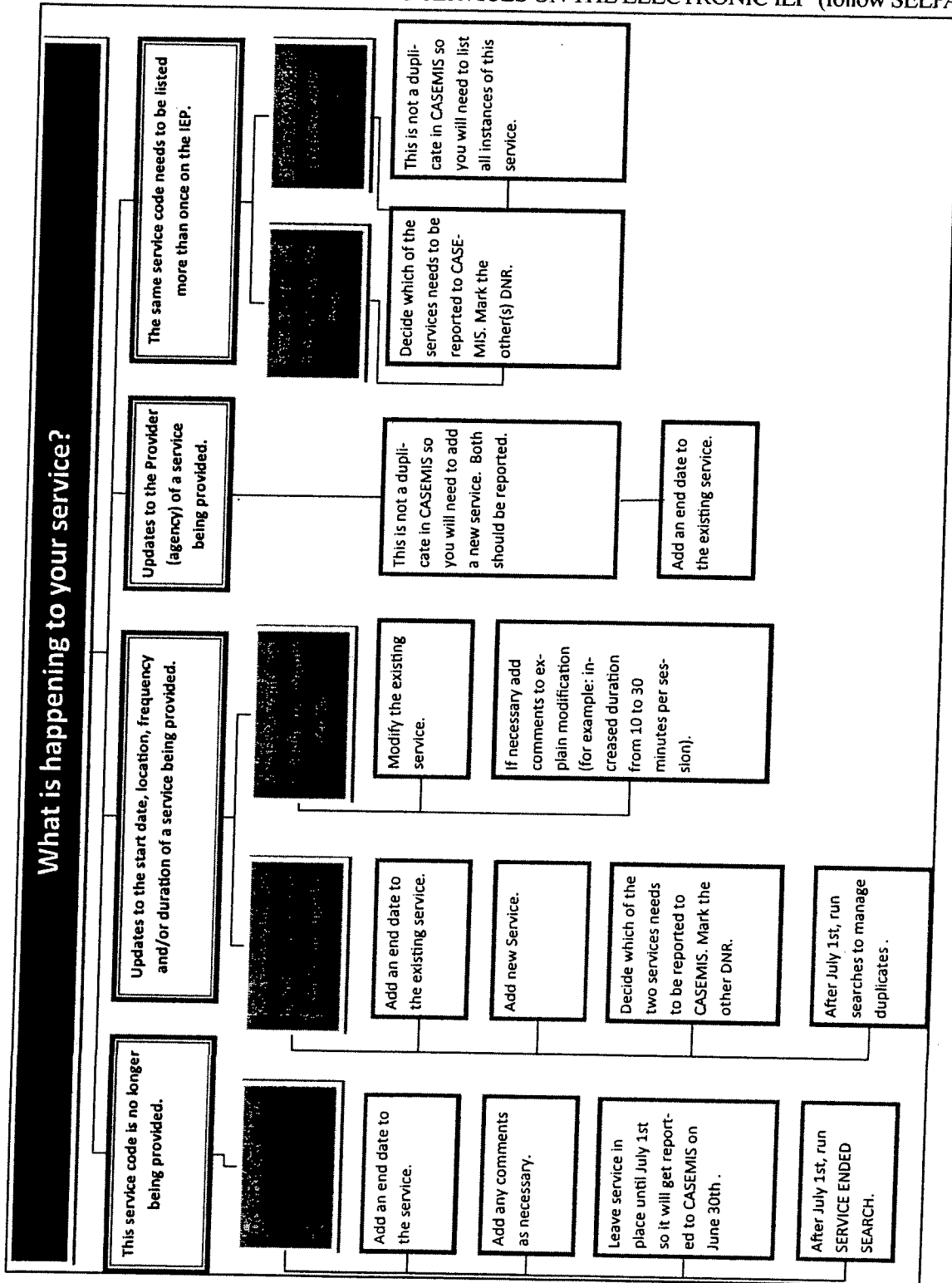
#### Monitor Caseload

- Make sure all students on your caseload are accurate.
- Clear all pending that have been on your caseload over 60 days.
- Affirm IEPs older than 7 days – including addendum IEP documents.

#### Monitor Alerts on Homepage

- 25 day annual IEP/ISP alert.
- 75 day triennial IEP alert.

SEIS RECOMMENDATIONS FOR MANAGING SERVICES ON THE ELECTRONIC IEP (follow SELPA guidelines)



Please Note: For the CASEMIS report SEIS will pick up ALL services listed on the students CASEMIS B tab (which are the same services listed on the services form of the Future IEP) with 2 exceptions:

1. Services marked DNR.
2. Services with a start date after the upcoming CASEMIS report date (12/02/xxxx for the December report and 07/01/xxxx for the June report).

## About Services

If a user has the permission to edit, they will want to be careful with any changes to the services, as that could change the integrity of the IEP. Data may have been entered a certain way for a reason, so it's best to consult with the teacher(s) before making changes to the services grid.

Also be aware that SEIS allows duplicate services to be recorded on the IEP, but CASEMIS does not allow duplicate services to be reported. A duplicate service is one with:

- The same service code
- The same provider agency

And

- Services with a start date on or before the upcoming CASEMIS report date (12/01/xxxx or before for the December report and 06/30/xxxx or before for the June report).

Teachers often need the flexibility to list a service more than once. If one or more of the duplicate services occur in future fiscal years, only the current year's services will be pulled for CASEMIS. All but one of the duplicate services occurring in the current fiscal year will need to be marked Do Not Report (DNR) to avoid duplicate service errors from the CASEMIS software. For more information on searching for duplicate services and marking them DNR, please see "Section 3:" on page 33 of this Services section. DO NOT mark services starting in the next fiscal year DNR.

### Services and CASEMIS:

The June 30th CASEMIS report should include every service that was provided to students during the previous fiscal year. It is important to manage the Electronic IEP in SEIS so that services that are no longer being provided are still included in that report.

Only Services from CASEMIS Tab B (Student Record) are pulled for CASEMIS reporting. Since the Student Record is linked directly to the FUTURE IEP, services that are discontinued during the year must remain on the FUTURE IEP with end date and reason intact until AFTER data is pulled for the June 30 CASEMIS report.

## **How To Add Attachments in Addition to an Amendment:**

When needing additional pages to attach to an addendum/amendment, follow these steps:

1. Complete the Addendum/Amendment Form and Save the page.
2. Back on the IEP List page; click the Click Here to Update Future IEP Pages link. This will direct the user to review the instructions before being forwarded to the Future IEP list page.
3. Edit the necessary pages and Save the forms and return to the IEP List by clicking Print Multiple Forms button on any of the data entry screens.
4. Check the box(es) next to each of the page(s) that were recently edited.
5. Click the Print Selected Forms button. A window will appear with the selected forms in .PDF format.
6. Click the File menu and select Save As and save the .PDF forms to the computer. This is the file that will be attached to the Current IEP.
7. Use the View Current IEP link (next to Student Record) on the Future IEP List page, to go back to the Current IEP list of forms.
8. Click on the Attachments link located to the right of the list of forms box.
9. Click the Add an Attachment link.
10. Title the forms as they will be displayed on the Current IEP listing page (i.e. 4/1/2011 Amendment).
11. Use the Browse button to locate the recently saved IEP forms.
12. Click the Submit button.
13. Use the Return to IEP List link to see the recently attached forms on the Current IEP.

**If the Attachment includes student info, return to wherever the file was saved on the computer and delete it. Then go to the computer's recycle bin and empty the trash. SEIS is a secure site for these attachments since it is password protected. The computer might not be.**

*Please Note: Documents from the Document Library can also be attached to a student's IEP. To do so, download the document from the Document Library and follow steps 1-10 in the Adding an Attachment to an IEP section on the previous page.*

## **How To Affirm an Addendum:**

1. From the Home Page, click on the Student IEPs link in the STUDENTS section of the nav bar.
2. Click the Search button to bring up the Student IEP list for all students. (This list can be narrowed down by entering a Last Name, First Name, or School of Attendance).
3. Click Current to access the Current IEP.
4. Click the Edit link next to the Addendum to be Affirmed.
5. Review all info on the addendum. Once it is Affirmed it will be locked as a .pfd document and will not be editable.
6. Click the Save / Affirm button.

Once Affirmed, the system will date stamp the Addendum/Amendment with the date it was Affirmed. It will also list the user who Affirmed the addendum.

**Please Note: An Affirmed SEIS Addendum should match a SIGNED hard copy Addendum.**

## Attaching an IEP form from the Future IEP to the Current

There may be different reasons that you would want to do this;

The IEP meeting was held and the parents took the IEP home to review it before deciding to sign it. You would go ahead and Affirm the IEP so that the "offer" was saved in the student's history. If the parents bring the IEP back and changes need to be made before they will sign you just make those changes on the individual IEP forms on the Future then attach those to the Current.

You have Affirmed the IEP and realize that an error was made. Same thing as above, make the correction on the Future, then save the form and attach to the Current.

In both cases you would leave a comment to explain what was done.

[Return to List](#)   [Student Record](#)   [View Future IEP](#)   **Current Affirmed/Attested Forms**

Student Name	DOB	SEIS ID	Meeting Date	Date Attested	Plan Type	Purpose	Attachments	Addendums
Art Aeroplane	5/5/1993	141132	8/3/2009	8/4/2009	IEP	Annual, Triennial, Other: not signed Parents reviewing	Yes	Yes

**Comments (Click here to Edit):**

Note: If parent/legal guardian signature was not obtained prior to affirming this meeting's forms, once the parent/legal guardian signs, add a comment here and update the **Current IEP Signed** field on the [Student Record Dates tab](#) to reflect this information.

Service time for LSH changed, see attached service form. Parent signed 8/4/09

**INSTRUCTIONS:** To print a page of the IEP, first select the checkboxes next to the pages you would like to print, and click the "Print Selected Forms" link below. Note: Forms used at this meeting are listed below; those not used have been dimmed out. To Add Attachments or Addendums/Amendments use the appropriate link listed to the right of the forms box.

**PLEASE NOTE:** You must disable any pop-up blocking software to utilize the Print Form Feature in SEIS. [Click here for instructions.](#)

Affirm the IEP within 7 days of the meeting being held, making notes in the text box in the Affirm/Attest Confirmation Window. These notes will show at the top of the list of forms of the Current and Historical IEP's.

To attach those updated forms to the Current IEP, go to that form on the FUTURE IEP and make those changes and save the form.

Student Name	DOB	SEIS ID	District ID	Meeting Date	Grade	School of Attendance
Art Aeroplane	5/5/1993	141132		7/28/2010	12	Happy High School

**FORMS**

< Educational Setting - Offer of FAPE      **Services - Offer of FAPE**      Behavior >

View All Forms   0-9   A   B   E   G   I   M   N   P   R   S   T

**PLEASE NOTE:** You must disable any pop-up blocking software to utilize the Print Form Feature in SEIS. [Click here for instructions.](#)

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**CEDR TRAINING SPECIAL EDUCATION LOCAL PLAN AREA**

**Offer of FAPE SERVICES**

Name: Art Aeroplane

IEP Date: 07/28/2010

Then select PRINT FORM in order to bring up the .pdf file.

Student File Reviewed: \_\_\_\_\_

Reviewer: \_\_\_\_\_

Previous program: \_\_\_\_\_ (District of Residence or SBCEO/name of classroom)

Date of Review: \_\_\_\_\_

***Instructions:** Review the incoming IEP from either another district or another program within SBCEO. Check off any areas that need to be fixed through an amendment. Scan and send to the sending district or coordinator from SBCEO. It is the responsibility of the sending program to fix all errors made via an amendment within 30 days of the student entering the program. For district corrections, please copy Jarice Butterfield, Cathy Breen and the coordinator; for SBCEO corrections, please copy Cathy Breen and the coordinator. For any non-error corrections, where services need to be modified or goals excluded because of the change in placement, the receiving program is responsible for those changes via amendment within 30 days of the student entering the program.*

#### Information/Eligibility

- Boxes are incomplete
- Eligibility statement is missing
- Dates don't line up with reports or other evidence
- Triennial information is missing
- Triennial is overdue

#### Transition Plan (for 15+ and older – turn 16 during this annual period)

- Missing/incomplete course of study information
- Missing transcript if appropriate
- Missing evidence of student involvement
- Missing complete vocational assessment information
- On meeting notice, missing invitation of parent or student
- On meeting notice, box showing transition is not checked

#### Present Levels

- Missing Strengths, preferences, interests of the student
- Missing parent concerns
- Missing information about STAR Testing
- Missing information about CELDT
- Information regarding student levels is missing or unclear

#### Progress Reports

- Missing updated progress reports on SEIS or in the file.

#### Special Factors

- Boxes are not checked
- English Learner section is incomplete
- Behavior section is incomplete
- The review of areas of need doesn't match what is written in present levels

### Behavior Support Plan (Classroom Support Plan/PBIP)

- Box is checked saying Behavior Support Plan is attached and there is no plan attached

### Goals/benchmarks

- Baselines are missing or do not match with Goal
- Goals do not match areas of need (special factors or present levels pages)
- Goals are not measurable
- Goals are not linguistically appropriate
- There are no benchmarks for a student who takes CAPA
- No progress reports included in the IEP
- Boxes are not checked

### Statewide Assessment

- Science is not indicated for a student in grades 5, 8, 10-11
- History/Social Science is not indicated for a student in grades 8-11
- CAPA or CMA Justification is missing
- CELDT accommodations are missing

### Offer of FAPE Services (including ESY services)

- Boxes are not checked
- No psych service for a student who is ED
- Missing other related services for students with goals or present levels showing needs in those areas
- No ESY for a student who needs ESY
- Dates are not current
- No Mental Health services for a student who is open to Clinical Mental Health Services

### Offer of FAPE Educational Setting

- Areas of instruction are not listed describing when a student is not participating in the regular class
- The reason is not detailed for why the student is not participating with general ed for those activities
- Boxes are not checked
- Graduation plan is blank for grades 8 and higher

### Parent Consent

- Boxes are not checked
- IEP is not signed (find out if there is a signed page, scan and attach it to SEIS)
- No general ed teacher at past IEP meeting when teacher should be in attendance
- Exceptions to the IEP are indicated, but no evidence of a prior written notice response to the IEP exceptions

### Team Member Excusal

- No excusal forms for missing IEP team members required for that IEP
- No evidence of information provided to the parent in lieu of being in attendance at IEP meeting

Documentation of attempts to reach parent who cannot or does not attend

- For a not signed IEP, there is no evidence of district attempts to reach the parent to secure consent

Meeting Notice

- For a transition age student, no transition box checked
- For a transition age student, student is not invited
- Not all required members of the IEP team are invited

Amendment to the IEP

- No evidence of a meeting notice
- No evidence of a prior written notice for changes to be made to the IEP
- No evidence of attempts to reach the parent who is not in attendance or who has not signed consent for amended offer of FAPE

Other Missing Information

- No cumulative file, requests made: \_\_\_\_\_
- No prior written notice with the initial assessment request
- No prior written notice with the change of offer of FAPE for a requested review or amended IEP

## Checklist Prior to Affirm/Attest IEP

### On the Blue Side:

- Student/family demographic information is correct and complete (DEMOGRAPHICS)
- Custom fields are completed (DEMOGRAPHICS)
- SDC box is accurately reported as Yes or No (DEMOGRAPHICS)
- Student District of Residence is accurate (CASEMIS A)
- Student's grade level is accurate (CASEMIS A)

### On the White Side:

- All boxes are checked (ALL IEP PAGES)
- Dates of meetings are accurate – last, next (INFO/ELIGIBILITY)
- All boxes where narrative belongs are filled in (ALL IEP PAGES)
- Present levels page is complete and up to date – look for current dates for assessment information. Old information has been deleted. New information is factual and contains substantive data (PRESENT LEVELS, TRANSITION).
- Special factors are completed (SPECIAL FACTORS)
- Low incidence disability – considerations are indicated (SPECIAL FACTORS)
- EL student – supports are indicated, goals are included (SPECIAL FACTORS, GOALS)
- Student with interfering behavior – brief description of the behavior, it's impact, goals that address elimination of behavior or teaching of replacement behavior and reference to a behavior plan if appropriate (SPECIAL FACTORS, GOALS, BEHAVIOR)
- Summary areas of need directly reflect areas of need discussed in present levels and are indicated as special factors (SPECIAL FACTORS, PRESENT LEVELS)
- ITP is completed and reflective of post secondary goals (TRANSITION)
- At least one goal is written in each area of assessed need (GOALS, SPECIAL FACTORS)
- Goals have baselines that include data, are behavioral and are reflective of the goals
- Goals include required components
- The progress reports on old goals have been affirmed (GOALS, HOME PAGE)
- ~~Once the progress report has been affirmed, the old goals are deleted~~ (GOALS)
- Review dates for periodic reviews are included that reflect the reporting periods for other students without IEPs (GOALS)
- Services listed are appropriate for goals recommended (SERVICES, GOALS)
- Service dates, starting and ending, are accurate and up to date (SERVICES)
- Frequency is listed for each service (SERVICES)
- Consultant services are listed in supplementary aids and services at the top of the page, not as a direct service. All information required is completed (SERVICES)
- ESY services if appropriate are listed (SERVICES)
- Federal setting/school type are accurate (EDUCATIONAL SETTING)
- Mental Health box is marked yes only if the student is receiving Mental Health services under AB3632, Ch. 26.5, not if they are receiving Mental Health support from probation or through MediCal (MISC services). A service plan must be attached (EDUCATIONAL SETTING, ATTACHMENT)
- Previous meeting notes have been deleted. Only meeting note from this IEP to be affirmed is included (TEAM MEETING NOTES)
- Excusal forms are completed for any required member not present (EXCUSAL)
- Spelling is correct throughout the document (ALL IEP PAGES)

## **Student Status**

A student's Eligibility status affects what can be done to the student's record.

### **Pending Eligibility:**

Pending students are students that have been referred for assessment, but their Eligibility has not yet been determined. Once the assessment has been done they are changed to Eligible (Current) or to Plan Type 70/80/90 (DNQ or Not Providing Services). Pending students are NOT pulled into the CASEMIS report. This means that all status updates to pending students need to be completed before the final CASEMIS report is ran. When a student's record is transferred in SEIS to a new district, they will enter that new district as pending. The student will remain pending until the new district changes their eligibility status in SEIS. IEPs for Pending students cannot be Affirmed until they are changed to Eligible in SEIS.

### **Eligible:**

Eligible Students are students who are receiving services and will be reported to CASEMIS twice a year. They need to be marked plan type 10 or 20. If at any point the student is determined to no longer be Eligible for Special Ed services, they will need to be EXITED from the system, not changed to DNQ/Not Providing Services. This is to ensure students are reported properly on the June CASEMIS report.

### **DNO / Not Providing Services:**

If a student is determined to be Ineligible, or Eligible but not to receive services, the student needs to be marked DNQ / Not Providing Services (CASEMIS Plan Types 70/80/90). Plan Types 70 and 80 cover students who are Eligible but their parents have declined services either to enroll in Private School or for some other reason. Plan Type 90 covers students found to be Ineligible. The IEP will not be Affirmed for these students in the same way as for an Eligible student. When a teacher requests that a student be marked Ineligible or Eligible-Not Providing Services, SEIS will verify that the required fields are error free in the CASEMIS A Tab before the request can be processed. Once the change is made, whatever information is listed on the future IEP at the time of the status change will be locked into .pdf format to be saved on the History tab of the Student Record.

### **Exited Students:**

Exited students are students who were Eligible but have exited the Special Ed program. This can include students who have graduated, students who have moved, or students who have become no longer eligible for services. When a teacher is aware that a student should be exited they will send the exit request via their Student Change Form. This will populate an alert on the Home Page of all admin users with access to exit that student. Once the change is made in SEIS, whatever information is listed on the Future IEP at the time of the status change will be locked into .pdf format to be saved on the History tab of the Student Record. If an exit IEP was held, verify it has been affirmed before the student is exited.

*Please Note: When a student is exiting special education, regardless of the reason, their IEP must maintain all of their information from when the student was receiving services. The services the student was receiving up until the exit IEP must remain listed on the IEP. An End Date should be entered on the service rather than deleting the service. All Disability and any other information needs to be kept in place. There is no need to input upcoming meeting dates as these future date fields are not CASEMIS required. Also, the Plan Type needs to remain as 10-IEP/IFSP or 20-ISP, rather than changing this field to plan type 70, 80 or 90. The reason services and other information must remain on the IEP is due to this information being reported to CDE during the end of year CASEMIS report. Once the student is Exited, an Exit Date and Exit Reason are input, so all information confirms that the student is no longer receiving any services.*

For more information on Exited vs. Transferred students, please see "Transferred Students List" on page 17.

## How To Process Transfer Requests

### Permission Needed: Manage Student Accounts

The last part of the individual transfer process is to release records requested from other SELPAs. The student must be Exited by the current district before the transfer can be processed. Releasing the student will require that the CASEMIS error check is satisfied so that the releasing district will have the data needed for reporting this student in the next June 30 CASEMIS report. If the student is marked DNR, the CASEMIS error check will be bypassed.

1. Click the View link to the right of Students Transferring Out of District in the TRANSFER REQUESTS section of the Home Page.
2. Click the Process Transfer link.
3. The student will need to be exited before they can be transferred to the new district's list of students.
4. Add an Exit Date and Exit Reason to the Student Record.
5. Click the Save button.
6. Run a CASEMIS error check to make sure the student is error free. Students need to be error free before the transfer can be completed.

*Please Note: If the student is marked DNR, the CASEMIS error check will be bypassed and the transfer will be processed without verifying CASEMIS data. Be sure to follow up if the student does need to be reported.*

7. Click the Complete Transfer button.
8. The user will be taken to the release transfer screen where they can review info about the student.
9. Add any comments necessary in the comments box. These will be saved on the History tab of the Student Record next to the drop copy of the IEP.
10. Click the Continue button.
11. Click the Ok button on the confirmation screen.

## How To Decline Transfer Requests

### Permission Needed: Manage Student Accounts

1. Click the View link to the right of Students Transferring Out of District in the TRANSFER REQUESTS section of the Home page.
2. Click the Decline Transfer link.
3. Enter any comments explaining why the transfer is being declined.
4. Click the Submit button.

# How To Transfer Students in Bulk

## Permission Needed: Bulk Transfer Students

This type of transfer allows districts within the same SELPA to process groups of students changing District of Service, such as students from elementary districts moving to high school districts.

*Please Note: Bulk Transfers will ONLY pertain to students who are changing District of Service within the same SELPA. Single District SELPAs will not have the option to Bulk Transfer. Students must be accepted by the district they were sent to, either one by one, or in batches.*

**This type of transfer is different in that it is initiated by the SENDING district and does NOT require the sending district to satisfy the CASEMIS error check.**

## **How To Bulk Transfer Students Out of The District:**

1. From the Home Page, click on the Search for Students link in the CUSTOM SEARCHES section of the nav bar.
2. Add any necessary search criteria.
3. Click the Search button.
4. From the search results page, locate the Perform Task drop down at the top of the page and change the selection to Bulk Transfer Students.
5. From the next drop down, choose to include all search results or a sub-set of the data. (If sub-set is chosen, check the check boxes next to the students to be included in the sub-set.)
6. Click the Go button.
7. Choose the district to transfer students to.
8. Choose the school to transfer students to.
9. Enter an Exit / Transfer date.
10. Enter an Exit Reason.
11. Enter a comment. (if applicable)

Choose district to transfer students to	<input type="text" value="---Choose District---"/>
Choose school to transfer students to	<input type="text" value="---Choose School---"/>
Exit/Transfer Date	<input type="text"/>
Exit Reason	<input type="text" value="---Choose Reason---"/>
Comment	<input type="text"/>
<input type="checkbox"/> Remove ALL Service Providers at this time	
<input type="checkbox"/> Don't Transfer District of Residence	
<input type="checkbox"/> I acknowledge that I will be transferring 1 students.	
<input type="button" value="Transfer Students"/>	<input type="button" value="Cancel"/>

# How To Batch Update Providers

Permission Needed: Assign Providers

## How To Batch Update Providers:

1. From the Home Page, click Batch Update Providers link in the STUDENTS section of the nav bar.
2. Choose the provider to change from (the one to be removed).
3. Choose the provider to change to (the one that will be added).

*Please Note: If the change to field is the only one filled in, the provider will be added and no provider will be removed.*

4. Add a Start Date for the provider being added *Please Note: If blank, start date will default to today's date.*
5. Add an End Date for the provider being removed. *Please Note: If blank, start date will default to today's date.*
6. If Applicable, check the box to make the provider the Case Manager.
7. Check the boxes next to the students to be batch updated.
8. Click the Make Update button.
9. Click OK on the confirmation window.
10. Click OK to acknowledge the update.

Change From:  Change To:

Make the provider Case Manager for the student(s) as well.

Start Date (optional-use only for provider being "Added")  End Date (optional-use only for provider being "Deleted")

Choose Students:

<input type="checkbox"/>	Student	School	Grade	Case Manager
<input type="checkbox"/>	Ai, Hiroko	Tiger Helpdesk1		Swank Delane
<input type="checkbox"/>	blank, robert	Bunny Helpdesk2		Swank Delane
<input type="checkbox"/>	Doe, Joan	Delane's School	17	Swank Delane
<input checked="" type="checkbox"/>	Hawkins, Desmond	Tiger Helpdesk1		Swank Delane
<input checked="" type="checkbox"/>	Johnson, Stephanie	Delane's School		Swank Delane
<input type="checkbox"/>	Jones, sissy	Delane's School		Swank Delane
<input type="checkbox"/>	Lowell, Michael	Delane's School		Swank Delane



## **How To Exit a Student From Without a Teacher Request:**

1. From the Home Page, click on the Student IEPs link in the STUDENTS section of the nav bar.
2. Click the Search button to bring up the Student IEP list for all students. (This list can be narrowed down by entering a Last Name, First Name, or School of Attendance).
3. Click the student's name to go to the Student Record.
4. Click the Exit Student button.



Change Eligibility Status:     
 Do Not Report  Duplicate Student Record

5. Click the Exit Student button. If the student has any errors an alert will appear stating that all errors need to be cleared before the student can be exited. If the student is error free skip to step 9.
6. Click OK on the alert.
7. Click the link to show CASEMIS errors.
8. Clear all errors, save the form, and click the Exit Student button.
9. On the Exit screen, type any comments necessary in the comment box. These comments will be saved on the History tab of the Student Record next to the drop copy of the IEP.
10. Click continue. This will bring up a confirmation screen.
11. Click OK.

## **How To Edit Exited Students**

### **Permission Needed: Edit Exited Students**

In SEIS, Exited Student Records can be edited after they have been exited **ONLY** if the record was not transferred.

1. From the Home Page, click on the Exited Students link in the STUDENTS section of the nav bar.
2. Find the student to be edited.
3. Click the Go button next to the demographics drop down to go to the Student Record.
4. Make any changes necessary.
5. Click the Save button.

## STEPS IN A CUSTOM SEARCH

- Left side of SEIS page: CLICK *Search for Students*
- ENTER after *Save Search as*: title of your search
- CLICK *Add to Navigation Bar*
- CLICK *Save Search*
- Select your Search Criteria (select biggest criteria first and all additional criteria following – you can add new search criteria). The more criteria you add, the more definitive, yet restrictive search you will find.
- If you want to include exited students (if you need data from last year for example), change the radial button from No to Yes in the last search criteria.
- Enter the Columns* that you want to show in your results by adding new columns.
- The order you add the columns will be the order that they appear in your report.
- If you are looking for specific information regarding the search criteria, you will want to make sure you have included that as a column.
- When you have completed your Search Criteria and your Columns, go to top of the page and CLICK *Save Search*
- Perform Task*
  - If you want to print a report, leave the selection as print. To print a subset of your results, click the boxes next to each subset name, and after *Print From*, drop down to *Subset Only*
  - If you want to bulk add providers, change the selection from *Print* to *Bulk Add Providers*
  - Check out all of the other options available to you other than just to print the results
- CLICK *Go*
- Group By/Sort By/Then Sort By are all optional but lead to different appearing results, so play with this. You can group and sort by any category that you have listed as a column
- If you want to make a change to your search criteria or columns go back to the page that says *New Search* (you can use your back button to get there) and CLICK *Redefine Search*. Remember to always save your redefined search by CLICKING *Update Search*.

## **What Kinds of Custom Searches Can I Do?**

- Students who are Mental Health eligible
- Students who receive a specific service, like OT or APE or S/L
- Students from a specific grade level
- Students who receive an SDC level of support
- Students who are English Learners
- Students who have exited
- Students who take the CAPA
- Student classlists from all of your elementary teachers
- Private school students
- Students who are English Learners in grades K-6 who take the English CMA, and are SDC students (in other words, cluster your search criteria)
- And on and on. Name one, we'll run it

## **Why Should I Create Custom Searches?**

- It's kind of fun. It's like a little puzzle, a treasure hunt...
- You can find out a whole lot of information very very quickly
- The searches can identify where information is miscoded in SEIS and you can go in and fix the errors immediately
- Once you create a search you can save it and you never need to create it again, when you run it again, it updates automatically
- It allows for very nicely organized charts that can be shared with staff
- It allows teachers to customize the appearance of their classlists with parent contact information

## STAR Testing Search –

Very helpful for organizing your STAR test orders

- Click *Search for Students*
- Fill in after *Save Search As: STAR Test Information*
- Check *Add to Navigation Bar*
- Click *Save Search*
- Under *Search Criteria* –
  - Drop down to *Grade Level*
    - Select grades 2-11
- Under *Columns to Show in Results*
  - Add a new column or replace one of the existing default columns
    - Select *Grade Level*
    - Select *Participation in English STAR*
    - Select *Participation in Math STAR*
    - Select *Participation in Science STAR*
    - Select *Participation in History STAR*
    - Select *Participation in Writing*
- Click *Save Search* at the top of the page
- Click *Search*
- After *Perform Task Print From All search results* Press *Go*
- Arrange how the printout will look, Group by Grade Level or Case Manager
- Print from the browser

## Missing SSID Numbers

- Click *Search for Students*
- Fill in after *Save Search As: SSID*
- Check *Add to Navigation Bar*
- Click *Save Search*
- Under *Search Criteria* –
  - Drop down to *SSID*
    - Type in *Blank*
- Under *Columns to Show in Results*
  - Drop down to *SSID*
- Click *Save Search* at the top of the page
- Click *Search*
- After *Perform Task Print From All search results Press Go*
- Click *Print*
- Print from the browser

## OT Service Report

- Click *Search for Students*
- Fill in after *Save Search As: OT*
- Check *Add to Navigation Bar*
- Click *Save Search*
- Under *Search Criteria* –
  - Drop down to *Service*
    - Drop down to *Occupational Therapy*
- Under *Columns to Show in Results*
  - Drop down to *Current Service Report* if you want to see the frequency of service
  - Stay with *Student report* if you want just a list of kids receiving OT
    - Add other columns as interested (grade level, SDC, disability)
- Click *Save Search* at the top of the page
- Click *Search*
- After *Perform Task Print From All search results* Press *Go*
- Arrange how the printout will look, *Group by Case Manager, School of Attendance, Grade level*)
- Print from the browser

## English Learners Who Are SDC

- Click *Search for Students*
- Fill in after *Save Search As: EL SDC*
- Check *Add to Navigation Bar*
- Click *Save Search*
- Under *Search Criteria* –
  - Drop down to *EL*
    - Select *Yes*
  - Drop down to *eligibility*
    - Select *Yes*
  - Drop down to *SDC* (or you can put this in as a column in case you fear you have blank SDC field)
    - Select *Yes*
- Under *Columns to Show in Results*
  - For reclassification status add a new column
    - Select *1-English Only 2-Init Flu Eng etc*
  - Add other columns as desired (disability, grade level)
- Click *Save Search* at the top of the page
- Click *Search*
- After *Perform Task Print From All search results* Press *Go*
- Arrange how the printout will look, *Group by Case Manager*
  - Print from the browser

### **Other Automatic Searches**

- Discipline Action Report
- ESY Service Report
- Current Services Report
- Before Dec 1 or June 30: Duplicate services report, Duplicate SSID report

### Home Page Checks and Ongoing Checks for Accuracy

- Requests for changes from teachers
- Requests for adds from teachers – do a thorough job of ensuring student is not already in system
- Requests for transfer from other districts
- IEP out of timelines – look for red
- IEP not yet affirmed
- Amendments not yet affirmed
- Run a check on your SDC students to see if they are accurately recorded
- Run a check on your Duplicate services to make sure there are none of those
- Run a check on your Duplicate SSID students

### Roles and Responsibilities

- Update your user permissions at this point – teachers could do more than you have allowed them to do previously if you choose to have them do this (like updating addresses, spelling of names, adding providers, deleting providers, affirming IEPs)
- Create a roles and responsibilities list if this will help your teachers and providers to be better prepared with their IEP paperwork.

### Summer Updates – To Do's After July 1

- Do transfers of students to other districts first
  - *CLICK Search for Students*
  - Select your criteria press search
  - Instead of *Print*, drop down to *Bulk Transfer Students*
  - Follow directions given
- Do grade level change over starting with oldest group first and working backward
  - *CLICK Search for Students*
  - Select your criteria press search
  - Instead of *Print*, drop down to make bulk changes
  - Follow directions given
- Make your teacher/provider changes
  - On left side of Home Page, *CLICK Batch Update Providers*
  - Follow directions given
- When you receive transfers from other districts make sure you do the following:
  - If they have come from SBCEO change to District of Service
  - Delete services that are now out of date
  - Uncheck DNR on services that being at the start of the school year
  - Update school of attendance, federal setting
  - Update transportation information and any custom fields
  - Make the student eligible

# How To Manage News Items

## Permission Needed: Create News Items

News Items will be visible on the Home Page and can include graphics, text, attached documents, and/or HTML links. This feature is used to post tips, instructions, staff development events etc. The two most recent News Items will appear above the main body of the Home Page notices, and older items will appear below.

*Please Note: News Items can be created at the SELPA level also. News items created at the district level are not seen by SELPA level users.*

## How To View News Items:

1. From the Home Page, click on the Manage News Items link in the CUSTOM section of the nav bar.

Title	Details	Current News	People to Show	
<b>CASEMIS Report is DONE!!!</b> <a href="#">View</a>	Posted By: Nikki Castellanos Last Updated: December 20, 2010	<input checked="" type="checkbox"/>	Selpa District School Site Teacher	<a href="#">Delete</a>

2. News items that are currently displayed on the Home Page will show a check mark in the Current News column.

## How To Add a News Item:

1. From the Home Page, click on the Manage News Items link in the CUSTOM section of the nav bar.
2. Click the Add a News Item link.
3. Choose the font size and color of the title.
4. Title the news item.
5. Check the boxes to indicate the user levels able to view the news item.
6. Choose the font size and color of the body text.
7. Add content (the first content box allows 1000 characters. If more space is needed use the second content box which allows 8000).
8. Add a continuing link. (if applicable) This is the link that will take users to the page to display the full news item. Only necessary if the second content box was used.
9. Browse for a graphic. (if applicable) *Please Note: The file must be jpeg or gif to display correctly.*
10. Browse for an attachment. (if applicable) (this can be a word doc, pdf, etc).
11. Insert a link to a web site. (if applicable.)
12. Click the Save News button.

### How To Update a News Item:

1. From the Home Page, click the Manage News Items link in the CUSTOM section of the nav bar.
2. Click the title of the news item to be edited.
3. Make any necessary changes.
4. Click the Save News button. To cancel all changes click the Undo Changes button then click the Save News button.

**Title:** Font Size: 1 Font Color: Purple

Training!

**Type(s) of users to show:**  District  
 School Site  
 Teacher

**Content:** Font Size: 1 Font Color: Black

District Training will be held Friday at 10am.  
please reserve your spot now! Contact Kirstin at  
555-555-5555 if you will be attending.

### How To Delete a News Item:

1. From the Home Page, click on the Manage News Items link in the CUSTOM section of the nav bar.
2. Find the news item to be deleted.
3. Click the Delete link.

### How To Update the News Rotation:

1. From the Home Page, click on the Manage News Items link in the CUSTOM section of the nav bar.
2. Un-check any news items to remove them from the Home Page.
3. Check any news items to be added to the Home Page.
4. Click the Save Current News List button.