

 **Phoenix**

Phoenix Training Completing the IEP 2022-2023

This is one of 2 sections for Phoenix IEP Chair Training.

This section covers completing the IEP including all forms and screens.

The other section, Navigating Phoenix, covers basic navigation, the reevaluation process, completing IEP Amendment and IEP Correction events, progress reports, changing providers, teacher reports, student reports and Phoenix Supports.

Some of this is covered during IEP Chair training but there is much more here. Use the bookmarks to navigate to the page you wish to view.

Notification of Meeting - Annual IEP

The Notification of Meeting must be completed, saved, and stored for the associated event, in this case the Annual IEP, to lock.

The NOM must be printed and provided to the parent at least 10 days prior to the Meeting Date unless the parent has waived the 10 days.

It is not enough to notify the parent of the date, time and location verbally or through email. They must receive a copy of the NOM which includes other information the district is legally required to provide.

Notification of Meeting – Annual IEP

Event Type	Primary Staff	Scheduled	Due
Notification of Meeting - Annual IEP 0	TRAIN TRAIN12	01/23/2020	01/23/2020
Annual IEP	TRAIN TRAIN12	01/23/2020	01/23/2020
Reevaluation Decision	TRAIN TRAIN12	08/28/2020	08/28/2020

- Notification of Meeting is linked to Annual IEP
- Click the event name to open NOM
- The open envelope icon indicates no notices have been created and stored

Notification of Meeting

The Notification of Meeting (NOM) is a separate event associated with the main event. Not all events have an NOM (for example: Reevaluation Decision, Disciplinary Documentation, IEP Amendment, and IEP Correction)

- It is always linked to the "parent" event – it is linked here to the Annual IEP
- Stays linked after the event (IEP) is locked
- **Should be completed before the IEP is opened or the Plan Dates will have to be edited when the IEP is opened**

Icons on Scheduled Event panel:

- Edit (aka the pencil): Used throughout the program to change/edit something
 - On the Scheduled Events panel it opens the Schedule Meeting Window
 - Can not be used to change the Scheduled (Meeting) Date for the Annual IEP (or other events with an associated NOM) – the Scheduled Date is entered on the NOM form
 - Can be used to change the scheduled date of an event that does not have a Notification of Meeting attached such as a Reevaluation Decision
 - Can be used to change Primary Staff assigned to the meeting – the meeting will then appear on your My Meetings Calendar
 - For events with a Notification of Meeting, this change is made using the Edit icon for the NOM, not the event itself.
- Envelope: indicates the number of NOMs that have been created and stored. The envelope is white until an NOM is stored then it is black filled. At least one NOM must be "stored" to lock the associated event.

Schedule Meeting Window

- Used to change Primary Staff of event
- Can add "Invited Staff"
 - Event appears on their "My Meetings" calendar
- Can be used to change Scheduled Date in some events

Schedule Meeting

Case Manager : TRAIN12 TRAIN12

Program Type : Special Ed

Event Type : Notification of Meeting - Annual IEP

Scheduled Date : 10/12/2021 Scheduled Time : 11:00 AM

Due Date : 10/12/2021 Event Details :

Primary Staff : TRAIN12 TRAIN12

Invited Staff +	Title
TRAIN12 TRAIN12	

Save Cancel

Schedule Meeting Window

The Schedule Meeting window opens when the "Edit" icon (the pencil) is selected.

The window can be used to change the Primary Staff for the event. The event will then appear on the user's My Meetings calendar on the Dashboard when it is due within 30 days.

Can add others as "Invited Staff" for the event. The event will appear on their My Meetings calendar.

The Scheduled Date cannot be edited for an event with a Notification of Meeting. The date is entered and updated on the Notification of Meeting form.

The Scheduled Date can be edited on events without a Notification of Meeting such as the Reevaluation Decision (covered later). An event cannot be locked in Phoenix prior to the Scheduled Date so it is necessary to edit the date if it is in the future. Click in the date field to display the calendar then select the date.

The Due Date is editable in some events but should only be changed if you created the event. You should never change the Due Date for an IEP or Reevaluation event.

NOM – Event Overview

Notification of Meeting - Annual IEP Overview

Training Student 45

Student ID: 100045 MOSIS ID: DOB: 03/21/2003 16y 3m Grade: 11th Attending: Hero High

Notification of Meeting - Annual IEP

EVENT SECTION	FORM NAME	Validation Check
Notice of Meeting	Notice of Meeting	NOT MODIFIED
	Record of Attempts	NOT MODIFIED
Event Attachment(s)		

← Back to Events ✓ Invitation Record 🔄 Reload Event Data

➤ Create/Store Invite ✎ Validation Check

- The Overview shows
 - Event Sections
 - List of forms in each Event Section
 - Required forms – indicated by star icon
 - Buttons at bottom

Event Overview

After opening an event, the Event Overview displays

The Event Overview

- Displays the Forms List on the left side of the screen
- On right side is a list of forms available in each Event Section
- Not all forms display on the Overview when the IEP is opened for the first time. Some forms are “hidden” until the user creates them.
- Series of buttons across the bottom – Explained on next slide

To open a form, click the name of the form on either the Forms List panel or on the Overview list

Overview Icons – NOM Events



Icons appear at the bottom of the Overview

- A. Back to Events:** closes the event and returns you to the Events page
- B. Invitation Record:** Includes all "stored" NOM and Record of Attempt forms (only on NOM events)
- C. Reload Event Data:** Refreshes form data
- D. Create/Store Invite:** Creates a PDF of the NOM and Record of Attempts and Stores them in the Invitation Record (NOM events)
- E. Validation Check:** Checks that all required forms and fields have been completed – checks for program compliance, not DESE compliance.

Links and Icons available across the bottom of the Event Overview of the NOM event:

- A. Back to Events:** closes the event and returns you to the Events page
- B. Invitation Record:** Includes the PDF of all "stored" NOM and Record of Attempt forms. This is where copies of previously completed NOM forms can be viewed and printed.
- C. Reload Event Data:** Refreshes form data
- D. Create/Store Invite:** Creates a PDF of the NOM and Record of Attempts and Stores them in the Invitation Record
- E. Validation Check:** Checks that all required forms and fields have been completed – checks for program compliance, not DESE compliance. There are frequently times that Phoenix will allow an event to be locked because it meets program compliance even if it doesn't meet DESE compliance. Although many rules are included in Phoenix to assist with compliance, it is impossible to program for all possibilities. *This is the reason it is critical to proofread before locking.*

Notice of Meeting

EVENT SECTION	FORM NAME	Validation Check
Notice of Meeting	Notice of Meeting	NOT MODIFIED
	Record of Attempts	NOT MODIFIED

- To view form, click **Notice of Meeting** on Forms List panel or on the Form Name list

Notice of Meeting

Open the form by clicking the name of the form (Notice of Meeting) on either the Forms List Panel on the left or the Forms Name list on the Overview.

Notice of Meeting – Field Colors

Is this meeting being held at parent request? Yes No Date of parent request:

This meeting is confirmed for Date: Time:

Location:

If you are unable to attend this meeting, please contact me at as soon as possible.

Sincerely,

Name: Title: Date:

cc: Liaison: Component District:

- Colors of the fields
 - Green text: Prefilled and non-editable
 - Red outline: Required field
 - Blue outline: Required field that has been completed but is editable
 - Grey outline: Not required, editable
 - Grey fill: disabled/inactive until an action is taken to turn it on

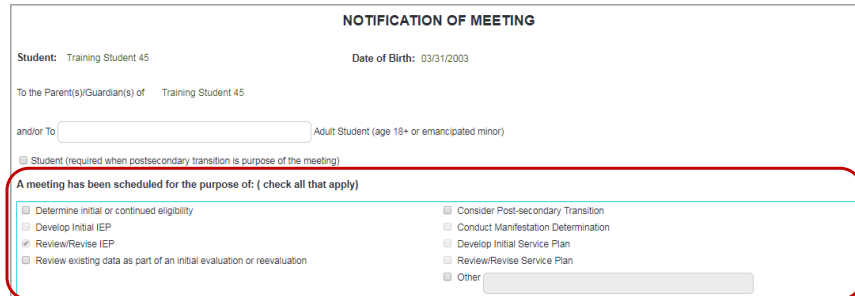
Notice of Meeting – Field Colors

Colors on the form:

- **Green text:** prefilled and not editable
- **Red outline:** Required field – event cannot be locked if any required fields are blank
- **Blue outline:** Required field that has been completed but is still editable
- **Grey outline:** Not required by Phoenix but may be required for DESE compliance – editable
- **Grey filled fields:** Disabled/inactive – These fields become active when something is entered in another field – for example, the Role becomes required if a name is entered in the Name field for a non required participant.

NOM – Purpose of Meeting

- Select the purpose / purposes of the meeting



NOTIFICATION OF MEETING

Student: Training Student 45 Date of Birth: 03/31/2003

To the Parent(s)/Guardian(s) of Training Student 45

and/or To _____ Adult Student (age 18+ or emancipated minor)

Student (required when postsecondary transition is purpose of the meeting)

A meeting has been scheduled for the purpose of: (check all that apply)

<input type="checkbox"/> Determine initial or continued eligibility	<input type="checkbox"/> Consider Post-secondary Transition
<input type="checkbox"/> Develop Initial IEP	<input type="checkbox"/> Conduct Manifestation Determination
<input checked="" type="checkbox"/> Review/Revise IEP	<input type="checkbox"/> Develop Initial Service Plan
<input type="checkbox"/> Review existing data as part of an initial evaluation or reevaluation	<input type="checkbox"/> Review/Revise Service Plan
	<input type="checkbox"/> Other _____

- Can select multiple
- If "Consider Post-secondary Transition" is selected
 - Student Name / Title autofill in Participants section
 - First Agency field becomes required

Notification of Meeting – Purpose of Meeting

"Review/Revise IEP" is preselected as a meeting purpose because this is an Annual IEP.

- Other purposes are preselected in other events
- Preselected purposes cannot be unchecked
- Some purposes are disabled ("greyed out") because they cannot be combined with this meeting

Select any additional purpose / purposes of the meeting you are scheduling.

- The option for Post-secondary transition must be selected for every IEP once the student turns 15
 - When this option is selected
 - The box at the top for "Student (required postsecondary transition is purpose of the meeting)" is checked automatically
 - The student's name and title autofills in the Participants section and cannot be removed
 - The first "Agency" row is required
- "Other" can be selected if needed
 - Any purpose entered in "Other" must be related to the event

NOM – Meeting Date

The screenshot shows a web form for entering meeting information. The following fields are outlined in red to indicate they are required:

- Is this meeting being held at parent request? Yes No Date of parent request:
- This meeting is confirmed for Date: Time:
- Location:
- If you are unable to attend this meeting, please contact me at as soon as possible.
- Sincerely,
- Name: Title: Date:
- cc: Liaison: Component District:

- Complete required fields – outlined in red
- If Meeting Date is in the past a Confirmation window appears when the form is saved. Select Cancel to change the date or Proceed if date is correct.
- Date Sent must be on or before the Meeting Date

Meeting Date

Meeting Date is required

- Enter the date of the meeting
- Click in the field then select the Meeting Date on the calendar
- If the Meeting Date is in the past, a Confirmation window appears when the form is saved. To keep the date, select "Proceed". To change the date, select "Cancel" and revise the date.
 - It is OK to have a past date for some events, but it should never happen for an Annual IEP because the parent must receive a copy BEFORE the meeting
- Parent must receive a printed copy of the NOM at least 10 days prior to the Meeting Date unless they have waived the 10 day notification requirement
- The Meeting Date becomes the Scheduled Date on the Scheduled Events panel

Events cannot be locked if the Meeting (Scheduled) Date is in the future

Date Sent must be on or before the Meeting Date

Notification of Meeting - Participants



The following individuals have been invited to participate in this meeting (name and/or specific position(s) within the public agency):

Role of Participants	Name	Title
General Education Teacher**	<input type="text"/>	<input type="text"/>
Individual to interpret instructional implications of evaluation results**	<input type="text"/>	<input type="text"/>
Component District Representative**	<input type="text"/>	<input type="text"/>
Special Education Teacher*	<input type="text"/>	<input type="text"/>
SSD Representative*	<input type="text"/>	<input type="text"/>
Non-Public Representative	<input type="text"/>	<input type="text"/>
Student	<input type="text"/>	<input type="text"/>
Agency representative(s) for post-secondary transition (must have appropriate consent to invite)		
Agency Name	<input type="text"/>	<input type="text"/>

- Enter all participants invited by SSD
- Note there are participants that may be excused
- Can enter more than one name on a line
- "Other" fields available

Participants

Enter all participants being invited by SSD

- Best practice is to enter ALL teachers even if they aren't expected to attend, and anyone else who might attend (principal, etc.)
- "Individual to interpret . . ." can be SPED teacher but could be School Psych if reevaluation is being discussed
- Component District Representative is usually a counselor or principal from the partner district – in some districts this can be the regular ed teacher – be sure to check first!
- SSD Representative: Best practice is to enter SSD Administrator, but it can be an SSD Teacher
- Non-Public representative (*for SNAP students only*): representative from a private school
- Student: must be entered if 16 or over (autofills when post-secondary transition is marked as purpose of meeting)
- Agency Representative: for Post Secondary transition – training provided elsewhere. If fields are disabled (grey), select "Consider post-secondary transition" as a purpose of the meeting to activate the fields
- Part C Representative: for students under the age of 3
- Related Services Provider: can be SLP, OT, PT, etc. – not required for all students
- More than one person can be entered on a line (for example, multiple GE teachers) to save space

Note the asterisks indicating which participants can be excused with agreement of parent, SSD rep, and partner district rep (aka The Big 3)

- This is documented on the Excusal form in the IEP which must be completed and signed before the IEP meeting begins – can be done just prior to the meeting if necessary
- If parent does not agree to excuse a required participant, the meeting must be rescheduled

DESE Reminder: The Family Educational Rights and Privacy Act (FERPA) requires that a written Release of Information MUST be obtained for other persons invited by the parent or SSD to share confidential information at the IEP meeting. When inviting an outside agency to discuss post-secondary transition needs and services, a separate authorization is required for each IEP meeting held. The Student Information Exchange Form can be found at SSD Life>Resources>Forms or by searching the site.

Record of Attempts



RECORD OF DISTRICT ATTEMPTS TO SCHEDULE MEETING	
Student Name: Training Student 45	Date of Birth: 03/31/2003 Meeting Date: 11/04/2019
1st Attempt:	2nd Attempt: (must be a direct contact with the parent)
Date of Contact: <input type="text"/>	Date of Contact: <input type="text"/>
<input type="checkbox"/> Parent waived notification requirement*	<input type="checkbox"/> Parent waived notification requirement*
Method of Contact:	Method of Contact: (must be a direct contact)
<input type="checkbox"/> Written: <ul style="list-style-type: none"> <input type="checkbox"/> Hand Carried by Student <input type="checkbox"/> Regular Mail <input type="checkbox"/> Certified Mail <input type="checkbox"/> Fax <input type="checkbox"/> E-mail 	<input type="checkbox"/> Written: <ul style="list-style-type: none"> <input type="checkbox"/> Regular Mail <input type="checkbox"/> Certified Mail <input type="checkbox"/> Verbal: <ul style="list-style-type: none"> <input type="checkbox"/> Phone <input type="checkbox"/> Face to face contact

- Records attempt to schedule meeting – not all contacts made
- First attempt is required
- Second needed only for "Cannot attend. . ." or "No response"

Record of Attempts

- Included in the Notification of Meeting event
- Records attempt to schedule and hold the meeting
- Do not enter all attempts on this form – only those when meeting has been scheduled and letter is sent
- Record other contacts (phone calls, emails, etc.) on the student’s parent contact log

Complete by filling out the required fields

- The first attempt (left side) is required
- The first attempt should be at least 10 days prior to the meeting date. If it is not the parent must waive the 10-day requirement and you must check the box
- The 10-day requirement can be waived by the parent, but never by the district

Choice must be made in the Parent Response section of the First Attempt in order to print the NOM

- If you were unable to make contact with the parent use "Yes, I'll be there" to prevent the 2nd attempt from being required – can change later if necessary
- The second and third choices should only be used if the meeting is being rescheduled for some reason (parent requested a different date, there was no response from the parent and they did not attend the first attempt to hold the meeting)
- If the parent response choice changes you must select Create/Store Invite again to store that version. If this is not done the new NOM/ROA will be lost when the IEP is locked.

Second Attempt – used if the meeting is rescheduled

- If, after the first attempt to hold the meeting occurs, the Parent Response is either "Cannot attend" (parent requests reschedule) or "No Response" (the parent does not attend on the first scheduled date), the second attempt becomes required. The second attempt is only used after a first attempt has been made to hold the meeting.
- Only two attempts are required before holding the meeting without the parent
- If a second attempt is required, an additional 10-day notice is required

NOM – Validation Check

The screenshot shows a web interface for a 'Notification of Meeting - Annual IEP' form. At the top, a green banner displays 'Validation Check Successful'. Below this, a table lists forms with their names and validation dates. The table has columns for 'EVENT SECTION', 'FORM NAME', and 'Validation Check 07/29/2019'. Two rows are visible: 'Notice of Meeting' and 'Record of Attempts', both with a green 'COMPLIANT' status. At the bottom, there are navigation buttons: 'Back to Events', 'Invitation Record', 'Reload Event Data', 'Create/Store Invite', and 'Validation Check' (highlighted with a red box).

- Click **Validation Check**
- Message appears indicating "Validation Check Successful" or error message appears
- If Validation Check is successful, continue
- Form Status shows "Compliant" when Validation Check is successful

Validation Check

When both the NOM and Record of Attempts are complete, click "Validation Check" on one of the forms, or return to Event Overview.

Form Status remains "NOT MODIFIED" (unless the event has been closed and reopened).

- Phoenix only checks for Compliance, and updates the Status of each form, when you click "Validation Check" or when the event is closed and then reopened.

Click **Validation Check**

If event is compliant a message will appear (compliance means no fields required by Phoenix are blank – **does not check for legal compliance, only for Phoenix compliance**)

- If event is not compliant, a box will appear listing the errors
 - Fix the errors, return to Event Overview and do another Validation Check until the event is compliant
 - If you can't figure out how to correct an error, contact the Service Desk

When the Validation Check is successful, the Status for both forms will be "COMPLIANT" with green fill

The NOM can only be locked (Create/Store Invite clicked) when the Status column displays "COMPLIANT" for both forms. If "NOT COMPLIANT" (yellow fill) appears for either form, it must be completed.

NOM – Create/Store Invite

The screenshot shows a web application interface for a 'Notification of Meeting - Annual IEP'. The main form has a header with 'EVENT SECTION' (Notice of Meeting), 'FORM NAME', and 'Validation Check 07/29/2019'. Below the header, there are two green bars labeled 'COMPLIANT'. A modal dialog box titled 'Invitation Attempt Reason' is open in the center, featuring a dropdown menu labeled 'Select Attempt Reason' and 'Save' and 'Cancel' buttons. At the bottom of the main form, there are navigation buttons: 'Back to Events', 'Invitation Record', 'Reload Event Data', 'Create/Store Invite', and 'Validation Check'. The 'Create/Store Invite' button is highlighted with a red box.

- When Notice of Meeting and Record of Attempts are Compliant click **Create/Store Invite**
- Select Invitation Attempt Reason
- **Save**

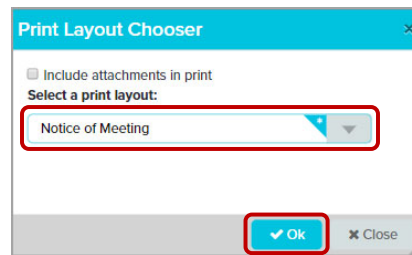
Create/Store Invite

NOTE: A printed copy of the Notification of Meeting MUST be provided to the parent at least 10 days prior to the meeting even if agreement about date and time has been made some other way. There is information on the NOM that is legally required to be provided to the parent.

Printing the Notification of Meeting

- Click **Create/Store Invite**
 - "Create/Store Invite" stores a PDF copy of the Notification of Meeting and Record of Attempts.
- Select the **Invitation Attempt**
 - Same attempt reason can be used multiple times if necessary
- **Save**
- Reminders:
 - The IEP cannot be locked if "Create/Store Invite" is not selected for the Notification of Meeting event
 - If information is changed on either the Notification of Meeting or the Record of Attempts, the form must be Saved **AND** "Create/Store Invite" must be also be selected to "Lock" and store the most recent version of the forms. If "Create/Store Invite" is not selected, the newest version will not be saved when the IEP is locked.

NOM – Printing



- Select "Notice of Meeting" from print layout menu
- Click **OK**
- PDF of Notification opens
- Use PDF controls to print
- Record of Attempts is not printed or sent to parent

Printing the Notification of Meeting

- After clicking "Create/Store Invite" the Print Layout Chooser window appears
 - Select "**Notice of Meeting**"
 - Record of Attempts is "For Internal Use Only" – it is not printed for the parent. It is only printed if needed by the district.
- Select **OK**
 - Select Cancel if printing is not needed at this time
 - A copy can always be printed from the Invitation Record
- The PDF of the form will open in a new window or tab depending on browser settings
- To print, click the printer icon on the PDF tool bar
 - To print only page 1, use the printer controls to change the print range
- After viewing/printing the form, close the window or tab to move on.
- To correct an error on the NOM, reopen the form
 - The information from the previous notice will be filled in (If "Create/Store Invite" was clicked, the previous version has been stored and can be viewed/printed if needed)
 - Make the necessary corrections, save and "Create/Store Invite" to store new version
 - No need to reopen the Record of Attempts (unless an error was made there)
- To reschedule a meeting:
 - Reopen the Notification of Meeting. The information from the previous notice be complete.
 - Update the information and save
 - Open the Record of Attempts and complete the side for 2nd attempt
 - *Save and "Create/Store Invite" again* choosing the appropriate Invitation Attempt Reason

NOM Envelope Icon

Event Type	Primary Staff	Scheduled	Due
Notification of Meeting - Annual IEP	TRAIN TRAIN12	08/02/2019	11/04/2019
Annual IEP	TRAIN TRAIN12	08/02/2019	11/04/2019
Reevaluation Decision	TRAIN TRAIN12	12/20/2019	12/20/2019

- The Envelope icon fills in
- The number indicates the number of Notifications Created and Stored

NOM Envelope Icon

When a Notification of Meeting has been created and stored, the envelope icon on the Scheduled Events panel fills in.

A number indicates the number of notifications that have been created and stored.

Viewing and Printing Stored NOMs

Notification of Meeting - Annual IEP

EVENT SECTION	FORM NAME	Validation Check 07/29/2019
Notice of Meeting	Notice of Meeting	COMPLIANT
	Record of Attempts	COMPLIANT

Event Attachment(s)

← Back to Events **Invitation Record** @ Reload Event Data Create/Store Invite Validation Check

- Open Notification of Meeting
- Click **Invitation Record**
- Each stored NOM is listed
- Click hamburger icon
- Select "Notification of Meeting"

Attempt	Date	Reason	
1	07/29/2019	First Attempt	

Close

Viewing Stored Notices of Meeting

Every time "Create/Store Invite" is clicked, a PDF copy of the Notification of Meeting and Record of Attempts is stored under "Invitation Record". *If a new copy of the original form is needed, it is not necessary to "create/store" another copy. Open the Invitation record and print the original.*

Use the Invitation Record to view/print saved NOMs and ROAs

1. Open **Notification of Meeting**
2. Click **Invitation Record**
3. Select the **hamburger icon**
4. The form opens
5. Form can be printed by using the PDF controls

Close the form

Note that the Date on the Previous Invites window is the date the NOM was "Stored", not the Meeting Date.

Annual IEP

Annual IEP – Event

Click the name of the Annual IEP event to view the Event Overview.

Event Type	Primary Staff	Scheduled	Due
<input checked="" type="checkbox"/> Notification of Meeting - Annual IEP 1	TRAIN TRAIN12	08/02/2019	11/04/2019
<input checked="" type="checkbox"/> Annual IEP	TRAIN TRAIN12	08/02/2019	11/04/2019
<input checked="" type="checkbox"/> Reevaluation Decision	TRAIN TRAIN12	12/20/2019	12/20/2019

The Annual IEP has several sections. Click the form name on the Forms List panel or the Form Name list to view the form.

EVENT SECTION	FORM NAME	Validation Check
Excusal	Excusal	NOT MODIFIED
Front Page	Plan Dates	NOT MODIFIED
	Front Page - IEP	NOT MODIFIED
PLAAFP	PLAAFP	NOT MODIFIED

Annual IEP – Overview

The Annual IEP has several sections, some of which include several forms.

Not all forms are visible on the Overview when the event is opened for the first time. Some forms are "hidden" and do not appear until an action is taken to create them. For example, Form D-Part 1 to document the student's participation in the Grade Level Assessment, is not visible until it is created by selecting that option on the Special Considerations form. The form then appears on the lists with a star indicating it is required.

Event Overview Icons and Buttons

• Stars indicate required forms

EVENT SECTION	FORM NAME	Validation Check
Excusal	Excusal	NOT MODIFIED
Front Page	<input type="checkbox"/> Plan Dates <input checked="" type="checkbox"/> Front Page - IEP	NOT MODIFIED

← Back to Events Reload Event Data Print Lock Event Validation Check

- Buttons and icons are the same as the Notification of Meeting with exception of Lock Event



- Only Lock Event after Validation Check and proofreading
- Once locked, an event cannot be unlocked
- If error is discovered after locking, an IEP Correction event must be completed or event deleted and redone

Overview Icons and Buttons

A star indicates the form is required

- Some forms are required when the IEP is started, others become required as work is completed in the IEP
- If there is no star the form is "optional" which means the IEP can be locked if it is not complete
 - Some "optional" forms are legally required for specific circumstances. For example, the Notice of Action is "optional" in Phoenix but required in many situations.

Buttons at the bottom of the Overview

- Same as the Notification of Meeting except
 - Lock Event – also found at the bottom of all forms and screens
 - If the event is *technically* "compliant" when the lock button is clicked, a confirmation message will appear, and you will be able to lock, even if the event is not DESE compliant
 - As no event in Phoenix can be unlocked, it is critical to remember that if an IEP event is locked and a mistake has been made, a correction event will have to be completed or, if the event was user created, the event will have to be deleted and redone
 - Best practice is to click "Lock" on the Overview only AFTER the Validation Check is successful and the event has been *"printed" and proofread*

Form Buttons

← Back to Events

Print

Lock Event

Validation Check

Save

- **Back to Events:** Closes the event and returns to Events list
- **Print:** Create the event PDF in order to print
- **Lock Event:** Locks the event
- **Validation Check:** Checks form compliance and gives the user the opportunity to view errors on the form and throughout the event
- **Save:** Saves the entered information. The Save button is active only when there is information to be saved.

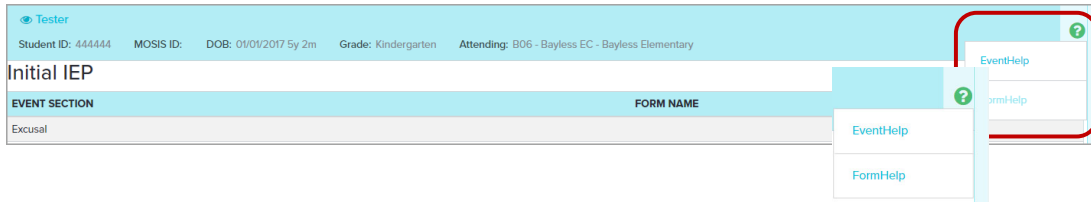
Form Buttons

At the bottom of each form is a series of buttons.

- **Back to Events:** Closes the event and returns to Events list
- **Print:** Create the event PDF in order to print. Prints all completed forms in the event, not just this form.
- **Lock Event:** Locks the event if the event is compliant. Remember, there is a difference between Phoenix compliance and DESE compliance. You should always print and proofread before locking any event as events cannot be unlocked. If an error is found in a locked IEP an IEP Correction event must be created and completed.
- **Validation Check:** Checks form compliance (Phoenix compliance) and gives the user the opportunity to view errors on the form and throughout the event.
- **Save:** Saves the entered information. The Save button is active only when there is information to be saved. If new information has been entered but the Save button is not active, click in a white space on the form. That will activate the Save.
 - The Save button does not activate if the cursor is inside a field. It is not necessary to locate the cursor, just click in a white space outside of a field.

Optional forms, such as the Excusal, have an additional button that appears when the form is saved. The "Set Status to Not Modified" button is used to reset a form that is no longer needed so it does not appear in the locked event.

Using Phoenix Help from Event or Form



- To open Phoenix Help when inside an event or form click the Help Icon (the question mark)
- Choose Event Help when on Event Overview

Using Phoenix Help when in an event or form

- Click the Help icon (the question mark) in the upper right corner
 - When on the Event Overview the only option is Event Help
 - When on a form or screen (Federal 4 Summary, Assessments, Classroom Accommodations, Goals and Services), both Event Help and Form Help can be selected
 - The help page opens as a new tab or new window depending on browser settings

Event Help

Annual IEP Event



Created by Gale Wagoner
Last updated: Mar 02, 2022 • 1 min read • 4 people viewed

This article assists users when completing the event.

Page Contents

Event information

The Annual IEP is created, with the Notification of Meeting, when an Initial IEP and Parent Consent-Initial Services-IEP, an Annual IEP, or an Annual IEP (Transfer) is locked.

Before opening the Annual IEP Event, complete and save the Notification of Meeting-Annual IEP and the Record of Attempts. Be sure to Create/Store the Notification.



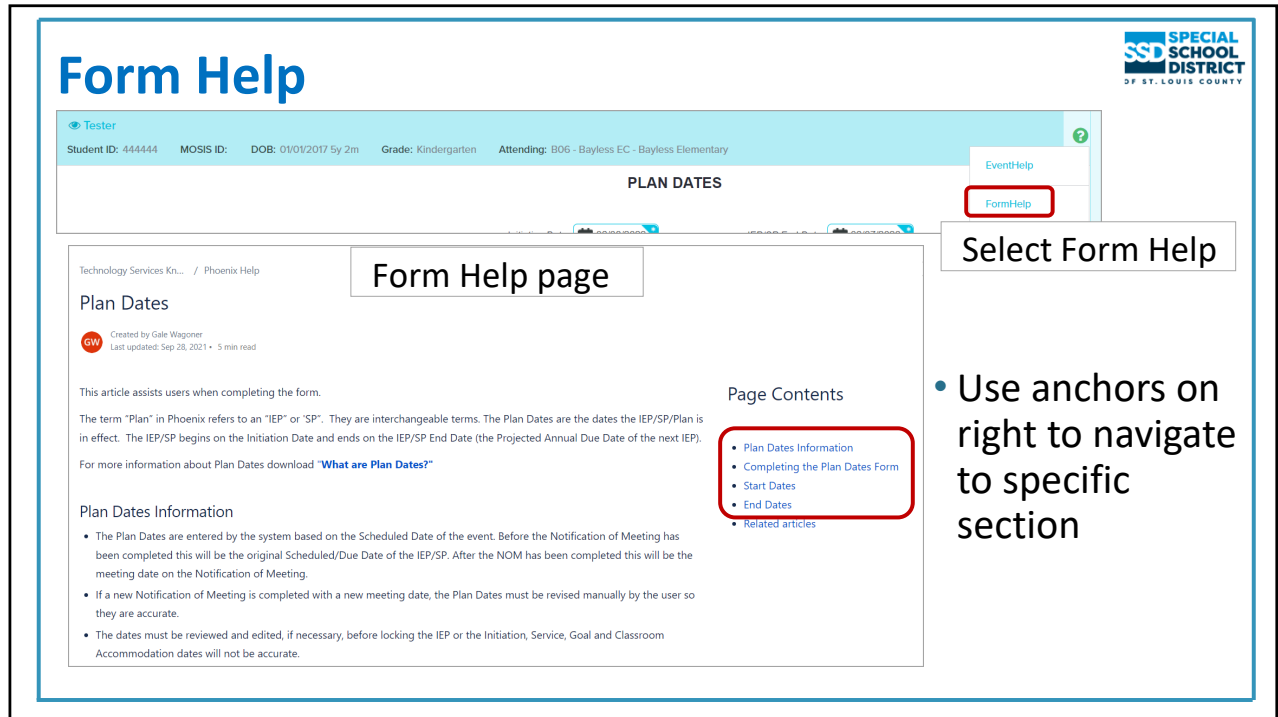
Important reminder: Always review the **Plan Dates** before locking the Annual IEP Event. *If an IEP Event is opened before the Notification of Meeting is completed and saved, the Plan Dates are based on the original Scheduled Date (the Due Date) of the IEP, not the Meeting Date.* The Plan Dates must be checked for accuracy before locking or the initiation, service, goal and accommodation dates may not be accurate.

- [Event information](#)
- [Related articles](#)

- Event Help page – information about the event including important reminders

Event Help

- If a Help window or tab is already open when a new Help page is chosen, the new page will open in a new window/tab
- Can keep the tab or window open and click back and forth between Phoenix and the Help Site
- If the help page opened in a new window close or minimize the window to return to Phoenix
- Return to Phoenix by closing the tab/window or clicking the tab/window for Phoenix



Phoenix Help – Form Help

To view Form Help

- Click the Help Icon in the upper right corner of any form or screen
- Choose Form Help

The Help page for the form you are on will open (in this case the Plan Dates)

Form Help pages contain step by step directions for completing the form as well as some tips and reminders. Some also include links to support documents.

Click the anchors on the right to navigate through the longer pages

Return to Phoenix by closing the tab/window or by clicking the Phoenix tab/window

Excusal



EXCUSAL OF THE IEP TEAM MEMBERS AGREEMENT FORM

Student: Test TRAIN

Date of Birth: 11/01/2010

Meeting Date: 05/13/2022

For the IEP meeting to be held on: 05/13/2022, the following IEP team members are excused from attendance for the following reason(s):

Team Member Name	Role	Area(s) of Curriculum or Related Service	Reason for Excusal*	Date written report provided to parent and team before meeting (if applicable)
			<input type="radio"/> Reason 1 <input type="radio"/> Reason 2 (written report required)	
			<input type="radio"/> Reason 1 <input type="radio"/> Reason 2 (written report required)	
			<input type="radio"/> Reason 1 <input type="radio"/> Reason 2 (written report required)	

- Documents agreement that required participant(s) will not attend meeting
- Must be completed and signed **prior to start** of meeting

Excusal

Used to document agreement that required participant/participants will not attend meeting. Only used for IEPs, not Reevaluations, Amendments, etc.

Enter Name, Role and Area of the role being excused

- It is the *role* being excused, not a specific person – the person filling the role doesn't have to be the same person who was on the Notification of Meeting. If the role is filled for the entire meeting, an Excusal is not needed.

Must be completed and signed **prior to start of meeting**

- If parent agrees before NOM is sent, this can be sent with it, but it still must be signed and received prior to the meeting
- Can be signed just before meeting begins but not during or after

All signed documents must be copied so a copy can be provided to the parent and added to the student's teacher file. *The original of any signed document is sent to Student Records at SSD Central Office.*

If parent does not agree to the excusal, the meeting must be rescheduled at a time when all required participants can attend.

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Resetting an "Optional" Form

- If an "Optional" form such as the Excusal is started and saved but is no longer needed it can be reset



Click "Set Status to Not Modified" at the bottom of the form

1. Confirmation message appears
 2. Click "Yes"
- The Form Status returns to "Not Modified"
 - Information is not deleted
 - Form will not be included in locked IEP
 - Can be used with any "Optional" form once it is saved

Resetting an "Optional" Form

Once a form has been saved it must be either completed or reset in order to lock the event.

An optional form – one without a star on the Forms List Panel or Overview – that is completed, even partially, and saved, but is no longer needed, can be "reset" which means it will not be included in the locked IEP.

If the form has not been saved, click on a different form then choose "Ignore Changes and Continue" on the window that appears. Any information added will be deleted.

The following process is only necessary if the form was saved.

This can be used with any "Optional" form. In an IEP this is the Excusal, Prior Written Notices, and the Additional Information form.

It is not necessary to delete information before resetting.

To "Set Status to Not Modified"

1. Click "Set Status to Not Modified" at the bottom of the form
2. Click "Yes" on Confirmation window

The "Status" on the Event Overview will return to "NOT MODIFIED" which allows the IEP to be locked even if there is saved information on the form. The form will not be included in the locked IEP.

Resetting does not delete information entered

The form will not be included in the locked IEP

Front Page Section – Plan Dates

PLAN DATES

Initiation Date: <input type="text" value="08/12/2019"/>	IEP/SP End Date: <input type="text" value="07/31/2020"/>
Service/Goal Start Date: <input type="text" value="08/12/2019"/>	Service/Goal End Date: <input type="text" value="07/31/2020"/>
Meeting Date: <input type="text" value="08/02/2019"/>	Projected Annual Due Date: <input type="text" value="07/31/2020"/>

The dates entered above are accurate based on the IEP Team decisions and meet the requirements as stated below.

Plan Dates Explanation:
The term 'Plan' is used in Phoenix to refer to the IEP/SP. Plan dates are the effective dates of the IEP/SP - when the plan (IEP/SP) begins and when it ends.

Before this event can be locked,

- Initiation Date must match Service/Goal Start Date and must be the same or later than the Meeting Date.
- IEP/SP End Date and Service/Goal End Date must be the same as the Projected Annual Due Date.

- Plan Dates are effective dates of the IEP (the Plan)
- Calculated based on Scheduled Date on Scheduled Events (Meeting Date on Notification of Meeting)
- Critically important that these dates are correct and double checked before locking
- IEP cannot be locked if Plan Dates don't meet requirements

Front Page Section – Plan Dates form

Plan Dates are very important to the system. They are used to determine which IEP, Services, and Goals are "Active"

Plan Dates are:

- The effective dates (start and end dates) of the IEP – the "Plan"
- Automatically calculated by the system
- Based on the Scheduled Date on the Scheduled Events panel when the IEP is opened for the first time.
 - If the IEP is opened before the NOM is completed, the Meeting Date on the Plan Dates will match the original Scheduled/Due Date.
 - When the NOM is completed, the Scheduled Date is updated on Scheduled Events to the Meeting Date entered on the Notification of Meeting. The Meeting Date on the Plan Dates form also updates.

All except the Meeting Date and Projected Annual Due Date are editable on the form

- If the IEP was opened before the NOM is completed, the Meeting Date and Projected Annual Due Date will update on Plan Dates. The other dates must be manually updated.

The dates must meet the decisions of the IEP team and the requirements on the page

If the Meeting Date on the NOM is changed, the Plan Dates MUST be updated so they are based on new date, not old one.

Check these dates carefully before locking – especially the Initiation Date.

Front Page Section – Plan Dates

PLAN DATES

Initiation Date:	<input type="text" value="08/12/2019"/>	IEP/SP End Date:	<input type="text" value="07/31/2020"/>
Service/Goal Start Date:	<input type="text" value="08/12/2019"/>	Service/Goal End Date:	<input type="text" value="07/31/2020"/>
Meeting Date:	<input type="text" value="08/02/2019"/>	Projected Annual Due Date:	<input type="text" value="07/31/2020"/>

The dates entered above are accurate based on the IEP Team decisions and meet the requirements as stated below.

Plan Dates Explanation:
The term 'Plan' is used in Phoenix to refer to the IEP/SP. Plan dates are the effective dates of the IEP/SP - when the plan (IEP/SP) begins and when it ends.

Before this event can be locked,

- Initiation Date must match Service/Goal Start Date and must be the same or later than the Meeting Date.
- IEP/SP End Date and Service/Goal End Date must be the same as the Projected Annual Due Date.

- Dates must follow rules on the page
- Initiation Date must match Service/Goal Start Date and must be the same as or later than the Meeting Date
- IEP/SP End Date and Service/Goal End Date must match the Projected Annual Due Date (calculated from Meeting Date)

Plan Dates

Review these dates carefully – they must follow the rules on the page
Types of dates and basic rules

- **Initiation Date:** The date the IEP starts and the goals/services become active in Phoenix
 - Must be on or after the Meeting Date
 - For K-12 students should not be more than 10 days after the meeting date for an Annual IEP (per DESE).
- **Service/Goal Start Date:** The date the services and goals will start – must match the Initiation Date
- **End Dates:** The date the IEP, including all services and goals, ends. They must all match the Projected Annual Due Date calculated by the system – 364 days from the Meeting Date.

These dates automatically fill as the Begin and End Dates when a new classroom accommodation, goal, or service is created.

Changing and saving the dates here updates the matching dates on all Classroom Accommodations, Goals, and Services previously entered – message appears confirming changes.

Meeting Date in the grey box only changes when a new Notification of Meeting is completed.

Projected Annual Due Date is calculated from the Meeting Date (Meeting Date + 364 days) – it only changes when the Meeting Date changes – is not user editable

Before locking, check the confirmation box

- This box confirms that the dates were checked for accuracy
- Wait until ready to lock to check the box so you remember to confirm the dates and update if needed before locking.

Reminder: When the Meeting Date is changed, the Plan Dates must be reviewed and revised as needed to match the decisions made at the IEP meeting and to follow the rules on the form.

Plan Dates – Initiation/Start Dates

PLAN DATES

Initiation Date: 08/12/2019	IEP/SP End Date: 07/31/2020
Service/Goal Start Date: 08/12/2019	Service/Goal End Date: 07/31/2020
Meeting Date: 08/02/2019	Projected Annual Due Date: 07/31/2020

The dates entered above are accurate based on the IEP Team decisions and meet the requirements as stated below.

- Initiation Date is the date on which the IEP starts
 - Defaults to 10 days after the Meeting Date
 - Phoenix follows current IEP until the Initiation Date
- Per DESE an Annual IEP should start within 10 days of Meeting Date
- Service/Goal Start Date must match Initiation Date

Plan Dates – Start Dates

- The Initiation Date is the date on which the IEP starts, and the date Phoenix activates the plan, including the goals and services.
 - In an Annual IEP *for students in grades K – 12, the Initiation Date of the IEP should be on, or no more than 10 days after, the IEP Meeting Date.*
 - Per DESE, no undue delay can occur in providing special education and related services to the child. If a delay is necessary, the reasons must be documented.
 - Prior to this date the goals, services and accommodations appearing in Phoenix and in Phoenix Reports are for the previous IEP (the Active Plan).
 - This date should be checked carefully before locking the IEP.
- The IEP can be locked even if the Initiation Date is more than 10 days after the meeting date. In some cases (for example: EC IEPs written for Fall implementation, Initial IEPs when the parent signed the Consent for Initial Services PWN more than 10 days after the Meeting Date) this is correct.
- The Initiation Date is the date the IEP becomes the "Active Plan" in Phoenix.
 - Progress reports created prior to the Initiation Date will be for the previous IEP if the goals are active. If the goals in the previous IEP are not active (the IEP has expired), no reports will be created.
 - Information in district reports reflects data from the previous IEP until the Initiation Date.

Plan Dates – End Dates

PLAN DATES

Initiation Date: 08/12/2019	IEP/SP End Date: 07/31/2020
Service/Goal Start Date: 08/12/2019	Service/Goal End Date: 07/31/2020
Meeting Date: 08/02/2019	Projected Annual Due Date: 07/31/2020

The dates entered above are accurate based on the IEP Team decisions and meet the requirements as stated below.

- The IEP/SP End Date, Service/Goal End Date and Projected Annual Due Date must be the same
- The Date is 364 days after the Meeting Date
- Projected Annual Due Date updates when a new Meeting Date is entered on a Notification of Meeting
 - IEP/SP End Date and Service/Goal End Date must be updated manually

Plan Dates – End Dates

The End Dates are the date the IEP ends

- They must all match the Projected Annual Due Date
- All classroom accommodations, goals and services end
- No Amendment or Correction can be done after the end date

The Projected Annual Due Date updates when the Meeting Date changes on the Notification of Meeting. The IEP/SP End Date and Service/Goal End Date must be updated manually or the IEP cannot be locked.

The End Dates must all match. If the IEP will end prior to that date (the student is graduating, etc.), the IEP is ended when Student Data exits the student. *The End Dates cannot be changed.*

Remember: If you must update the End Dates the Start Dates will have to be edited as well. They may meet the Phoenix rules, but they won't be accurate for the IEP.

Front Page Section – Front Page-IEP



THE INDIVIDUALIZED EDUCATIONAL PROGRAM FOR:

Student: Training Student 45 Date of Birth: 03/31/2003 Meeting Date: 08/02/2019

Grade: 11th Age: Initiation Date: 08/12/2019

Phone: Projected Date of Annual Review: 07/31/2020

Address: City: State: Zip:

Resident District: Home School:

Services to be implemented at current school? Yes No

Location for Provision of Service:(if different from home school or resident district)

School Name: Phone:

[← Back to Events](#) [Print](#) [Lock Event](#) [Validation Check](#) [Save](#)

- Some fields autofill
- Required fields must be completed by the user
- Some "editable" fields may need to be completed

Front Page – IEP

Complete required fields

- The age field is required – you can see the student's age on the blue student header at the top of the screen

Check the Initiation Date

- It fills from the Plan Dates form – can only be edited on the Plan Dates form
- Annual IEP for a K12 student: If it is more than 10 days later than the Meeting Date, it should be corrected on the Plan Dates form. After changing the Plan Dates form the date updates on the Front Page.
- The Initiation Date should only be more than 10 days later than the Meeting Date for Early Childhood IEPs being written for the next school year, or when awaiting parent consent for an Initial IEP.

Be sure to look at all fields – Remember, a grey outline is only technically "optional". Some "optional" fields are legally required for some students in some scenarios. For example, the "Location for Provision of Service" section is grey but is required if the student is not attending their Home School.

If any demographic information is incorrect, it can be changed if in an editable field

- Student Data Secretary should be notified to have data corrected in ESI (the Student Data system).
- If information in green text is incorrect, contact Student Data Secretary who will correct it
- Correction will be available the following day. Data corrections made today in ESI will not be visible in Phoenix until the day after the change is made.

Front Page-IEP EDM Email Address



Educational Decision Maker is:

Parent Legal Guardian Educational Surrogate Foster Parent Child (age 18+) Other:

Name: Phone:

Address: City: State: Zip:

Email: (Email addresses provided to SSD will only be used for student related and SSD communications.)

Parent provided email address

Email:

Parent declined to provide email address

Reason:

Parent has no email address

- Enter name of Educational Decision Maker (parent/guardian/student age 18+)
- Select email option
 - Enter email address or reason email was not provided
- Required for first Parent name

Front Page IEP – Educational Decision Maker section

- Enter the name of the first Educational Decision Maker (Parent/Guardian/Student age 18+)
- Enter phone number
- Check address – revise if needed
- Make selection in Email section
 - Parent provided email address: Enter email address
 - Parent declined to provide email address: Enter reason parent declined
 - Parent has no email address
- If there is a second EDM, complete the second section

NOTE: The district uses EDM email addresses for parent communication. It is the parent's option to provide or not provide the address. If they give you an address they are willing to share with the district, it must be provided to Student Data so it can be entered in ESI – the student Data side of the program. Entering it here does not enter it into ESI. If the address changes, the change should be sent to Student Data.

Front Page-IEP – Participants

PARTICIPANTS IN MEETING AND ROLES

The names and roles of individuals participating in developing the IEP meeting must be documented

Role	Name	Method of Attendance/Participation
Parent	<input type="text"/>	<input type="checkbox"/> in person <input type="checkbox"/> by phone <input type="checkbox"/> did not participate <input type="checkbox"/> in writing (if applicable) Other: <input type="text"/>
Parent	<input type="text"/>	<input type="checkbox"/> in person <input type="checkbox"/> by phone <input type="checkbox"/> did not participate <input type="checkbox"/> in writing (if applicable) Other: <input type="text"/>
Student	<input type="text"/>	<input type="checkbox"/> in person <input type="checkbox"/> by phone <input type="checkbox"/> did not participate (if required) <input type="checkbox"/> in writing (if applicable) Other: <input type="text"/>
General Education Teacher	<input type="text"/>	<input type="checkbox"/> in person <input type="checkbox"/> by phone <input type="checkbox"/> excused <input type="checkbox"/> in writing (if applicable) Other: <input type="text"/>
Special Education Teacher	<input type="text"/>	<input checked="" type="checkbox"/> in person (*required participant)

- Enter Parent’s Name – mark appropriate method of Attendance/Participation
- Enter names and Method of Attendance/Participation for all participants

Front Page – Participants

In the participant section

- Complete all required fields
- The Parent Name field has a grey outline. However, the district requests that this field is completed for data purposes. Enter the parent/guardian/EDM name and if they do not attend, or participate in another way, mark "Did not participate".
 - The "Other" text field is limited to 10 characters.
- Enter everyone who attended/participated or was excused but no one who did not attend/participate and was not excused

Front Page – Participants

SSD Representative in person (*required participant)

Individual to interpret instructional implications of evaluation results in person by phone excused
 in writing (if applicable) Other:

Component District Representative in person by phone excused
 in writing (if applicable) Other:

Additional Participants listed on separate page

- If a participant is marked "Excused" an Excusal form must be completed
- If additional space is needed choose "Additional Participants" at the bottom to create new page

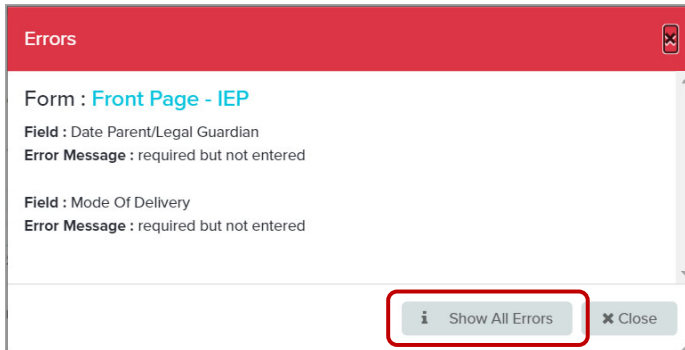
Front Page – Participants

- If a participant is marked "Excused" the Excusal form must be completed in the IEP. This is an example of a DESE requirement that is not a Phoenix requirement. Phoenix will not require you to complete the Excusal but if it is not included in the IEP when a participant is marked "Excused" on the Front Page, the IEP is out of compliance.
- If there isn't room for all participants, select "Additional Participants" at the bottom of the Front Page which will create the Front Page – Additional Participants form on the Forms List Panel and the Event Overview when the Front Page-IEP is saved
 - If the Additional Participants form ends up not being needed, return to Front Page and "uncheck" the box. The form will disappear. If information was added and saved, the form must be reset.
- If you attempt to open another form before saving the one you're working on
 - Message appears asking to save or ignore changes
 - Choose "Let me save changes" to save
 - This does not save the changes
 - Must click Save
 - Choose "Ignore" to remove any unsaved information and start form over again
- Reminder: Never click "Lock" when on a form
 - It does not lock the form – it starts the lock process if the event is compliant
 - Always do a Validation Check on a form or the Event Overview and proofread before locking
- Save – Saves the form

Validation Check on a Form



- After saving a form, Validation Check can be used to check for errors
- Compliance is checked for the form and event



- Errors for the current form display
- Click the name of the form or "Close" to address the errors
- Click "Show All Errors" to view errors on other forms/screens

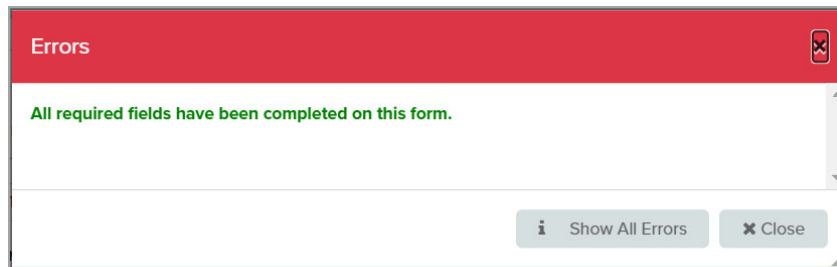
Validation Check on a Form

Validation (compliance) can be checked for an individual form after saving.

- Click Validation Check
- Compliance is checked for the form and the event
- If there are errors on this form or in the event, the Errors window opens
- If there are errors on the current form, they display
- If there are errors on other forms/screens, the "Show All Errors" button is visible
- To address the errors for the form click either the link for the form name or close the window
- To view errors on other forms/screens, click "Show All Errors"

Tip: It is best to do Validation Checks only after most, or all, forms have been completed.

Validation Check – No Errors on Form



- If there are no errors on the current form but there are errors on other forms/screens in the event, a message appears along with the "Show All Errors" button
- Click "Show All Errors" to view errors on other forms/screens

Validation Check – No Errors on Form

If there are no errors on the current form but there are errors on other forms or screens in the event a message will appear "All required fields have been completed on this form" and the "Show All Errors" button also appears

Click "Show All Errors" to view the errors in the rest of the event.

If there are no errors in the event a green message will drop down from the top of the screen saying "Validation Check Successful".

Validation Check – Open Form with Errors

Errors

All required fields have been completed on this form.

Form : [PLAAFP](#)

Field : The strengths of the student

Error Message : required but not entered

Close

- Click the form name to open the form and correct the errors

Validation Check – Open Form with Errors

After clicking "Show All Errors" a list of all errors in the event appears. The name of the form is a link. Click the link to open the form to correct the errors.

Front Page – Additional Participants



ADDITIONAL PARTICIPANTS IN MEETING AND ROLES
The names and roles of individuals participating in developing the IEP meeting must be documented.

Student: Training Student 45 **Date of Birth:** 03/31/2003 **Meeting Date:** 08/02/2019

Role	Name	Method of Attendance
Related Service Provider	<input type="text"/>	<input type="text"/>
Related Service Provider	<input type="text"/>	<input type="text"/>
Related Service Provider	<input type="text"/>	<input type="text"/>
Agency Representative for postsecondary transition services (if applicable)	<input type="text"/>	<input type="text"/>
Part C Representative (if applicable) Only if child is age 3 or under	<input type="text"/>	<input type="text"/>
Other:	<input type="text"/>	<input type="text"/>

- Space for additional participants

Front Page – Additional Participants

The Front Page – Additional Participants form is used to document participants that do not fit on the Front Page – IEP.

None of the fields are required by Phoenix but, if this is a student age 15 or over, the Agency fields must be completed for post-secondary transition.

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

PLAAFP Section – PLAAFP

1. PRESENT LEVEL OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE

(Functional Performance refers to general ability and problem solving, attention and organization, communication, social skills, behavior, independent living, self-advocacy, learning style, vocational, employment)

Student: Training Student 45

Date of Birth: 03/31/2003

Meeting Date: 08/02/2019

Present level must include:

How the student's disability affects his/her involvement and progress in the general education curriculum; or for preschool students, participation in age-appropriate activities (For students with transition plans, consider how the student's disability will affect the student's ability to reach his/her post-secondary goals (what the student will do after high school).)

The strengths of the student (For students with transition plans, consider how the strengths of the student relate to the student's post secondary goals.)

- Text fields expand – no character limit
- Can type or copy/paste *as plain text*
- All providers enter information on the PLAAFP
- Save frequently

PLAAFP

Fields are expanding text boxes with no character limit

- Information can be typed or copied/pasted from a word processing document.
- ***If using copy/paste, save your original document as plain text before copying or, when pasting, right click and select "Paste as plain text".*** Do not use keyboard commands. Formatted text can cause issues when locking and printing the IEP.
- Many forms in Phoenix have expanding text boxes with no character limit.

Complete required fields

Indicate if student is taking an alternative assessment (MAP-A)

- If yes, choose "benchmarks/short-term objectives are on goal page"

Note: All providers, including all related service providers, will enter their present level information on the PLAAFP form. There is only one Additional Information form in the IEP and because of the expanding text boxes available in Phoenix, it should not be used for present level information. It is the responsibility of the IEP Chair to ensure that the information is easy to read (is parent friendly).

Reminder: Phoenix does not auto-save information on forms. It is important that you save frequently as you work – especially on the PLAAFP.

Special Considerations

2. SPECIAL CONSIDERATIONS: FEDERAL AND STATE REQUIREMENTS

Student: Training Student 45

Date of Birth: 03/31/2003

Meeting Date: 08/02/2019

NOTE: For the first six items below, if the IEP team determines that the student needs a particular device or service (including an intervention, accommodation, or other program modification) information documenting the team's decision regarding the device or service must be included in the appropriate section of the IEP. These must be considered annually.

Is the student blind or visually impaired?

No Yes If yes, Complete Form A

Is the student deaf or hearing impaired?

No Yes The IEP Team has considered the student's language and communication needs, opportunities for direct communication with peers and professionals in the student's language and communication mode, academic level, and full range of needs including opportunities for direct instruction in the student's language and communication mode in the development of the IEP.

- If Yes is selected for section requiring a form – the form is created on the Forms List panel and the Event Overview (for example, Form A)

Special Considerations

Answer questions on the form

Some questions create additional forms which appear on the Forms List Panel and Overview when the Special Considerations form is saved.

Transfer of Rights section

- If the form is needed for this IEP (student is 16 or 18)
 - select "Notification was given"
 - enter the date the ORIGINAL form was provided
 - select the box for "Form is needed for this IEP. This creates the Transfer of Rights form."
- If the student is 16, 17, or older than 18 and the form was previously provided
 - select "Notification was given"
 - enter the date the first form was provided
 - do not click the "Form is needed . . ." box
- When the student turns 18 the form is issued a second time
 - select "Notification was given"
 - enter the date the first form was provided
 - select the box for "Form is needed for this IEP. This creates the Transfer of Rights form."

Phoenix does not "nanny" users – you must be aware of all legal requirements that must be completed

- For example, if Form D indicates the student will use accommodations on state assessments, the Assessments screen must be completed but Phoenix will not require it or remind you
 - It is possible to lock the IEP without entering the accommodations
 - In this case an IEP Correction would have to be completed

If a form has been selected but was not completed or saved, it can be removed simply by changing your original answer to the opposite.

Note: If any form in this section is created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Special Considerations-Form A



FORM A: BLIND AND VISUALLY IMPAIRED

Student: _____ **Date of Birth:** _____ **Meeting Date:**

Based upon the student's current and future reading and writing skills and needs, the IEP team has determined the following regarding Braille/Braille instruction:

No. The student does not need Braille/Braille instruction. If no, complete the following. The IEP team made the determination that Braille instruction is not appropriate for this student based upon the following factors:

- Based on formal and ongoing assessment by a teacher of the visually impaired, the student's developmental level precludes effective use of Braille.
- Based on formal and ongoing assessment by a teacher of the visually impaired, Braille instruction is not currently appropriate due to student ability to access curriculum visually.
- Based on educational team review of IEP data, the student accesses the curriculum visually. The student does not have a suspicion of an educational disability of blind/visually impaired.

Yes. The student needs Braille/Braille instruction. Appropriate goals and benchmarks/objectives, which specify the competencies in reading and writing Braille to be taught during the school year, are included in this IEP. If yes, complete items below.

Methods by which Braille will be integrated into normal classroom activities:

- Completed by a Teacher of the Visually Impaired

Form A

In the Special Considerations Section

- Created by answering **Yes** to the question "Is the student blind or visually impaired" on the Special Considerations form.
- Completed by a Teacher of the Visually Impaired
- Complete all required fields – large text boxes expand
- Save

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Special Considerations-BIP



BEHAVIOR INTERVENTION PLAN

Student: Training Student 45 Date of Birth: 03/31/2003 Meeting Date: 08/02/2019

This Behavior Intervention Plan was developed based on:

Reevaluation
 Functional Behavioral Assessment (no reevaluation)
 Other _____

Summary:

1. Definition of behaviors being monitored for reduction include:

2. List of precursory behavior:

- Complete required fields
- Save
- Questions about the content or use of this form should be directed to your SSD Administrator

BIP Form

In the Special Considerations Section

- Created by answering Yes to the question "Does the student exhibit behaviors that impede his/her learning or that of others" on the Special Considerations form THEN choosing "Behavior Intervention Plan".
- Complete all required fields – the larger text fields expand.
- Save.

If you have questions about the content or use of this form ask your SSD Administrator (Coordinator or Building Principal). You may also download the BIP Supplemental Information Guide from Phoenix Help. The link is available on the BIP Form Help page and on the Resources page > Process Documentation > IEP/Amendment.

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Special Considerations – Form B



FORM B: EXTENDED SCHOOL YEAR

Student: Training Student 45 **Date of Birth:** 03/31/2003 **Meeting Date:** 08/02/2019

Determination of ESY eligibility and/or services can be conducted by:

1. The IEP team determines ESY eligibility and/or services at the annual meeting.
- OR
2. The parent and authorized representative(s) of the district(s), or the IEP team determines ESY eligibility and/or services at a later date by amending the IEP.

ESY Eligibility Decision:

The student is not eligible for ESY services.

The student is eligible for ESY services.

ESY Services Explanation:

ESY services are entered on the Services Screen and print on Form B.

- Can only select "The student is eligible".
- Reminder that ESY Services are entered on Services Screen and print on Form B.

Form B – ESY

In the Special Considerations Section

- Created when "Yes, the student is eligible for ESY services" is chosen on the Special Considerations form
- The only choice on Form B is "The student is eligible for ESY services" because the form would not be created if the student is not eligible.
- A reminder appears that services are entered on the Services Screen. The reminder does not print.

Keep in mind that creating and completing this form is only one requirement of the ESY process.

- Goals to be addressed during ESY must be indicated by checking the ESY box on the goal.
- ESY Services must be entered on the Services Screen. If they are not, Form B will print with only the top section.
- The system will not make the goal or service pieces required so it is possible to lock the IEP with no ESY goals or services entered.
 - In this case an IEP Correction must be completed.
 - This can be avoided by printing and proofreading the IEP before you lock it.

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Special Considerations – Transfer of Rights Section



Transfer of Rights: Notification must be given beginning not later than one year before the student is 18 informing the student of the rights under IDEA that will transfer to the student upon reaching the age of majority.

N/A for this student/IEP

Notification was given*:

Form is needed for this IEP

*This is the date the Transfer of Rights letter was originally given to parents, not the date of any subsequent notices.

- Transfer of Rights section is unique
- Form is issued when student is 16 and 18
- When the form has been issued once but is not needed for this IEP
 - Enter the date the original form was issued (not the current IEP date)
 - Do not select "Form is needed for this IEP"

Transfer of Rights section

The Transfer of Rights form is issued two times – when the student is 16 (not later than one year before the student is 18) and again when the student turns 18.

- If the form is needed for this IEP (student is 16 or 18)
 - select "Notification was given"
 - enter the date the *ORIGINAL form* was provided (the date is always the same)
 - select the box for "Form is needed for this IEP"
 - the Transfer of Rights form is created
- If the form was previously provided at 16 and the student is not 18 (form is not needed for this IEP)
 - select "Notification was given"
 - enter the date the *ORIGINAL form* was provided (the date is always the same)
 - *do not* click the "Form is needed . . ." box
 - no form is created
- When the student is 18 the form is issued a second time
 - select "Notification was given"
 - enter the date the *ORIGINAL form* was provided (the date is always the same)
 - select the box for "Form is needed for this IEP"
 - the Transfer of Rights form is created

Special Considerations – Transfer of Rights



Date: 08/02/2019

Dear Training Student 45

(Student)

(Parent/Guardian)

(Educational Decision Maker)

Mode of Delivery

RE: Transfer of Parental Rights at Age of Majority

- First issued when student is 16
- Issued again after student turns 18

Transfer of Rights

In the Special Considerations Section

- Created when, in the Transfer of Rights section of the Special Considerations form, the box for "Form is needed for this IEP" is checked. The box becomes available when "Notification was given" is selected.
 - It can also be created as a User Created Form if it is needed outside of an IEP
- The Transfer of Rights form is issued twice for each student – once at least one year before turning 18 (when they are 16) and once after the student has turned 18
- Be sure the Educational Decision Maker (EDM) is correct at the time the form is being completed
 - Before the student is 18 – parent/guardian
 - After the student is 18 – student (unless parent has provided documented proof of a power of attorney)
 - Student Data Secretary must be notified by IEP Chair when the student turns 18. She will change the EDM in the system.
- Student's name and birthdate autofill
- Enter the date of the student's 18th birthday
- Complete other required fields
- Save

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Special Considerations – State Assessments



State Assessments:

IDEA requires students with disabilities to participate in state assessments.

Does this student's grade placement or course of study during the time this IEP is in effect require consideration of participation in statewide assessments?

- NO No statewide assessment is required for this student at this time
- YES The student will participate in:
- Grade-Level Assessment for Grades 3-8 (complete Form D-Part 1) (N/A for MAP-A eligible students)
 - End of Course Exams for Grades 9-12, or, if appropriate, earlier grades (complete Form D-Part 2) (N/A for MAP-A eligible students)
 - MAP-A for eligible* students in Grades 3-8 and Grade 11 (complete Form D-Part 3) *<https://dese.mo.gov/college-career-readiness/assessment/map-a>
 - ACCESS for ELLs for EL students in grades K-12 (complete Form D-Part 4)
 - NAEP/International Assessments for selected students (complete Form D-Part 5)

If the student will participate in a state or national assessment

- Select "YES"
- Select the assessment(s) in which the student will participate
- Appropriate forms will be created based on selections

Special Considerations – State Assessments

The student's participation in State Assessments is documented in this section. If "Yes" is selected, select the specific assessments in which the student will participate. The appropriate form is then created when the Special Considerations form is saved.

- Form D-Part 1: Grade Level Assessments (GLA)
- Form D-Part 2: End-of-Course Exams (EOC)
- Form D-Part 3: MAP-A
- Form D-Part 4: ACCESS for ELLs
- Form D-Part 5: National Assessment of Educational Progress (NAEP)

If the student will participate in MAP-A, do not select GLA or EOC.

Tip: if the checkboxes are small on your screen making it difficult to select them, you can zoom your screen to increase the size. Select Control + or Command +

Special Considerations – Form D – Part 1 – Grade Level Assessments



Form D: Part 1
MAP Grade-Level Assessments
Grades 3 through 8: English Language Arts and Mathematics
Grades 5 and 8: Science

Student: Test TRAIN **Date of Birth:** 11/01/2010 **Date of Meeting:** 05/13/2022

The Grade-Level Assessment features both **Universal Tools** which are available to ALL students unless marked specifically for English Learners and **Accommodations** which are only available to students with an IEP/504 plan.

Participation

Student will participate in the Grade-Level Assessments **WITHOUT** Accommodations
 Student will participate in the Grade-Level Assessments **WITH** Accommodations

Universal tools are access features of the assessment that are either provided as digitally-delivered components of the test administration system or separate from it. Universal tools are available to students based on student preference and selection. IEP teams may recommend but not require the use of universal tools. For detailed descriptions of each tool and any restrictions on the use of them, please see the Tools and Accommodations section of the Grade-Level Assessments Test Coordinator's Manual found under the Manuals/Trainings tab of DESE's Grade Level Assessment webpage.

- Make selection for use of accommodations
- Complete the Universals sections

Form D-Part 1 – MAP Grade Level Assessments

Form D-Part 1 is created when "Grade Level Assessments" is selected in the State Assessments section of Special Considerations. It is a required form.

The form is used to document the student's participation in Grade Level Assessments (GLA). It is not used if the student is eligible for MAP-A which is documented on Form D-Part 3.

- Select how the student will participate in a GLA – Without or With accommodations.
- Complete the Universals sections. Consult with your SSD administrator for instructions for completing these sections.

Reminder: Accommodations for GLA are entered on the Assessments screen and print on this form.

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Special Considerations – Form D-Part 2 – End of Course Exams



Form D: Part 2
MAP End-Of-Course (EOC) Assessments
Grades 9-12, or if appropriate, earlier grades

Student: Test TRAIN **Date of Birth:** 11/01/2010 **Date of Meeting:** 05/13/2022

The End-of-Course Assessments feature both *Universal Tools* which are available to ALL students unless marked specifically for English Learners and *Accommodations* which are only available to students with an IEP/504 plan.

Required EOC Assessments: • Biology, English II, Government, and Algebra I (or Algebra II, if Algebra I was taken prior to grade 9)

Optional EOC Assessments: • Geometry, English I, American History, Physical Science, and Algebra II

Personal Finance EOC Assessment: 1. For students who are receiving personal finance credit from embedded coursework, the assessment is **REQUIRED**.
2. For students attempting to "test out" and receive personal finance credit toward graduation, the assessment is **REQUIRED**.
3. For students who are enrolled in a stand-alone personal finance course, the assessment is **OPTIONAL**.

Participation

Student will participate in the End-of-Course Assessments **WITHOUT** Accommodations.

<input type="checkbox"/> Algebra I	<input type="checkbox"/> Algebra II	<input type="checkbox"/> Geometry	<input type="checkbox"/> American History	<input type="checkbox"/> Government
<input type="checkbox"/> English I	<input type="checkbox"/> English II	<input type="checkbox"/> Personal Finance	<input type="checkbox"/> Biology	<input type="checkbox"/> Physical Science

Student will participate in the End-of-Course Assessments **WITH** Accommodations.

<input type="checkbox"/> Algebra I	<input type="checkbox"/> Algebra II	<input type="checkbox"/> Geometry	<input type="checkbox"/> American History	<input type="checkbox"/> Government
<input type="checkbox"/> English I	<input type="checkbox"/> English II	<input type="checkbox"/> Personal Finance	<input type="checkbox"/> Biology	<input type="checkbox"/> Physical Science

- Make selection for participation and use of accommodations
- Complete the Universals sections

Form D-Part 2 – End of Course Exams

Form D-Part 2 is created when "End of Course Exams" is selected in the State Assessments section of Special Considerations. It is a required form.

The form is used to document the student's participation in End of Course (EOC) exams. It is not used if the student is eligible for MAP-A which is documented on Form D-Part 3.

- Select how the student will participate in EOC – Without or With accommodations.
- Complete the Universals sections. Consult with your SSD administrator for instructions for completing these sections.

Reminder: Accommodations for EOC are entered on the Assessments screen and print on this form.

Tip: if the checkboxes are small on your screen making it difficult to select them, you can zoom your screen to increase the size. Select Control + or Command +

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in the Phoenix Help site.

Special Considerations – Form D-Part 3 – MAP-A



Form D: Part 3
Alternate Assessment (MAP-A)
Only for students with the most significant cognitive disabilities

Student: Test TRAIN **Date of Birth:** 11/01/2010 **Date of Meeting:** 05/13/2022

Participation

This alternate assessment is for students with the most significant cognitive disabilities who meet the multiple criteria* for eligibility which is based upon an educational curriculum focusing on essential skills and alternative learning standards in the following areas:

English Language Arts in Grades 3 through 8 and 11

Mathematics in Grades 3 through 8 and 11

Science in Grades 5, 8, and 11

- Select the appropriate section(s)
- Complete all required fields

Form D-Part 3 – MAP-A

Form D-Part 3 is created when "MAP-A" is selected in the State Assessment section of Special Considerations. It is a required form.

The form is used to document the student's participation in MAP-A as well as to explain why the student cannot participate in the general education assessment (GLA or EOC).

- Select the appropriate areas to be assessed through MAP-A
- Make a selection for Dynamic Learning Maps
- Complete the Justification section

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in the Phoenix Help site

Special Considerations – Form D-Part 4 – ACCESS for ELLs



Form D: Part 4
ACCESS for ELLs
Only for K-12 English Learners

Student: Test TRAIN **Date of Birth:** 11/01/2010 **Date of Meeting:** 05/13/2022

Participation

Choose one of the following ACCESS assessments and whether it will be administered with or without accommodations:

- Student will participate in the Kindergarten ACCESS for ELLs Assessments
 - WITHOUT Accommodations
 - WITH Accommodations
- Student in grades 1-12 will participate in the Online* ACCESS for ELLs Assessments
 - WITHOUT Accommodations
 - WITH Accommodations
- Student in grades 1-12 will participate in the Paper/Pencil ACCESS for ELLs Assessments
 - WITHOUT Accommodations
 - WITH Accommodations
- Student in grades 1-12 will participate in the Alternate ACCESS for ELLs Assessments
 - WITHOUT Accommodations
 - WITH Accommodations

*This includes students in grades 1-3 who will take the writing modality via paper/pencil.

- Make selection for participation and use of accommodations

Form D-Part 4 – ACCESS for ELLs

Form D-Part 4 is created when "ACCESS for ELLs" is selected in the State Assessment section of Special Considerations. It is a required form.

The form is used to document the student's participation in the ACCESS for ELLs assessment.

- Select the appropriate version of the assessment.
- Select if the student will participate Without or With accommodations.

Reminder: Accommodations for ACCESS for ELLs are entered on the Assessments screen and print on this form.

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in the Phoenix Help site

Special Considerations – Form D-Part 5 – NAEP



Form D: Part 5
National Assessment of Educational Progress (NAEP)
and/or International Assessments
Only for students selected to participate

Student: Test TRAIN **Date of Birth:** 11/01/2010 **Date of Meeting:** 05/13/2022

Participation

The student was selected for and will participate in NAEP and/or a related International Assessment **WITHOUT** Accommodations

The student was selected for and will participate in NAEP and/or a related International Assessment **WITH** Accommodations

- Select the appropriate option

Form D-Part 5 – National Assessment of Educational Progress (NAEP)

The NAEP is a national assessment administered in selected districts each year.

Form D-Part 5 is created when "NAEP" is selected in the State Assessment section of Special Considerations. It is a required form.

The form is used to document the student's participation in the National Assessment of Educational Progress (NAEP) and/or International Assessments.

- Select how the student will participate in NAEP – Without or With accommodations.

Reminder: Accommodations for NAEP are entered on the Assessments screen and print on this form.

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in the Phoenix Help site

Special Considerations-Form E

FORM E: DISTRICT-WIDE ASSESSMENTS

Student: Training Student 45 Date of Birth: 03/31/2003 Meeting Date: 08/02/2019

The student **WILL** participate in the following District-Wide Assessment(s) of Student Achievement that are administered for this student's grade level:

District Assessment:	Accommodations:
<input type="text"/>	Accommodations needed for the student to participate in this assessment are:
<input type="text"/>	<input type="text"/>
<input type="text"/>	Accommodations needed for the student to participate in this assessment are:
<input type="text"/>	<input type="text"/>

The student **WILL NOT** participate in the following District-Wide Assessment(s) of Student Achievement administered at their grade. But, they will participate in the following District-Wide Alternate Assessments for this student's grade level:

- NOTE: Alternate assessment must assess the same areas as the District-Wide Assessment.

- If "The student WILL .." participate in district testing, complete top section
- Accommodations are manually entered
 - If Accommodations will not be used enter "None"
- If "The student WILL NOT . . ." participate, complete bottom section

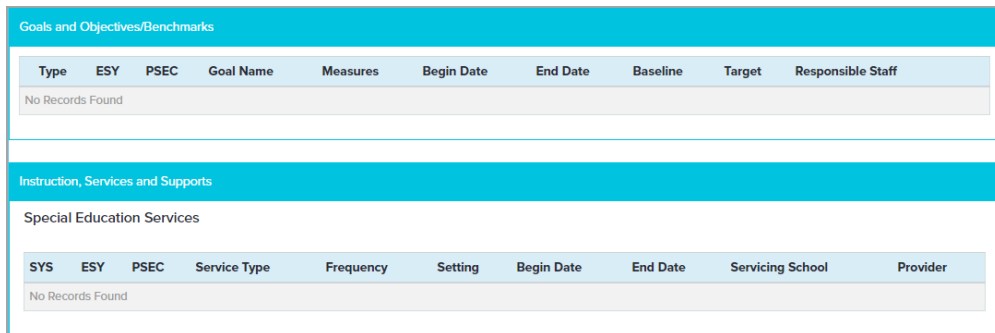
Form E – District Assessments

In Special Considerations Section

- Created when "Yes" is chosen for District Assessments on the Special Considerations form.
- Completed for students for whom there are district-wide assessments – whether they are participating or not.
- If the student will participate in an assessment, select "The student WILL participate . . ."
 - Enter the assessment name(s)
 - Enter the accommodations the student will use. The Accommodations are entered manually – there are no drop downs.
 - If the student will not be using accommodations, enter "None" in the accommodations field.
- If the student will not participate in an assessment, select "The student WILL NOT participate . . ."
 - Complete the required fields
- All text boxes on Form E expand with no character limit
- Save

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Federal 4 Summary Screen



Goals and Objectives/Benchmarks

Type	ESY	PSEC	Goal Name	Measures	Begin Date	End Date	Baseline	Target	Responsible Staff
No Records Found									

Instruction, Services and Supports

Special Education Services

SYS	ESY	PSEC	Service Type	Frequency	Setting	Begin Date	End Date	Servicing School	Provider
No Records Found									

- Summarizes information entered on Assessments, Classroom Accommodations, Goals and Services
- Starts blank
- Where the LRE is "accepted" (reviewed and saved)

Federal 4 Summary Screen

The Federal 4 Summary fills with information entered on the Assessments, Classroom Accommodations, Goals and Services screens.

The Federal 4 Summary is an excellent place to review the information entered on the screens before locking. You can scroll through the sections, or you can use the airplane icon to "fly to" a specific section.

This is where the LRE is reviewed and "accepted". Selecting "Accept LRE" on the Services screen moves you to the Federal 4 Summary.

More information about the Federal 4 Summary and accepting the LRE is provided later in this training.

Assessments Screen

State/District Assessments and Accommodations

Assessments Search

Select Assessment Type All Grades All School Years Q Clear

Search Results:

Category	Assessment	Alt	Section	Grade	School Year	Language
No Records Found						

Plan Assessments

School Year	Category	Assessment	Section	Alt	Accommodations	Justification
No Records Found						

- Example of a screen
- Does not look like printed form
- State Assessments and Accommodations are entered here
- Accommodations print on the appropriate section of Form D

Assessments Screen

This is an example of a screen, or product screen

- Unlike a form, it does not look like the printed form
- The information entered in the fields on the screen prints on the appropriate section of Form D
- There are 4 screens in each IEP and SP event: Assessments (for State Assessments), Classroom Accommodations, Goals, and Services
- State/National Assessments and accommodations are entered on the Assessments screen

Instructions for completing this section can also be found on the [Assessments Quick Start Card](#)

Assessments – Search for Assessments

- Add GLA, EOC, ACCESS for ELLs and/or NAEP when the student will use accommodations
- Not completed if student will not use accommodations or is participating in MAP-A

State/District Assessments and Accommodations

Assessments Search

1 Select Assessment Type

Select Assessment Type

ACCESS for ELLs 2.0

End-of-Course Assessments

NAEP

Grade Level Assessments

2

All Grades

All School Years

Q

Clear

Alt Section Grade School Year Language

1. Select the Assessment Type
2. Click the Search icon

Adding State and National Assessments (GLA, EOC, ACCESS FOR ELLS, NAEP) – Search for Assessments

This is where state/national assessments are added and accommodations for them entered.

*Assessments are added to this screen only if the student will be participating in Grade Level Assessments, End of Course Assessments, ACCESS for ELLs 2.0, or NAEP **WITH** accommodations.*

Add assessment to screen – in this example a Grade Level Assessment will be added

1. Select the Assessment Type

Choices available

- ACCESS for ELLs – English Language Learners
 - Used as annual English Language Proficiency assessment. Students who are in monitored status for ELL do not take the assessment.
- End-of-Course Assessments – high school students based on courses taken, not grade level
- NAEP – for selected students in selected districts
- Grade Level Assessments – students in grades 3 – 8

Skip "All Grades" and "All School Years". They cannot be changed.

2. Click the Search icon.

Assessments – Add to Plan

State/District Assessments and Accommodations

Assessments Search

Grade Level Assessments All Grades All School Years Q Clear

Search Results:

Category	Assessment	Alt	Section	Grade	School Year	Language
<input checked="" type="checkbox"/>	State	Grade Level Assessments		English Language Arts		English
<input checked="" type="checkbox"/>	State	Grade Level Assessments		Math		English
<input type="checkbox"/>	State	Grade Level Assessments		Science		English

Plan Assessments

School Year	Category	Assessment	Section	Alt	Accommodations	Justification
No Records Found						

← Back to Events Print Lock Event Validation Check Add to Plan Save

3. Choose the specific sections the student will take

4. Add to Plan

Add to Plan

3. Select the specific sections the student will take

4. Add to Plan

Tip: if the checkboxes are small on your screen making it difficult to select them, you can zoom your screen to increase the size. Select Control + or Command +

Reminder: Assessments are only added if the student will be using accommodations for the Grade Level, End of Course, NAEP, or ACCESS for ELLs assessments

- Assessments are not entered on this screen if
 - The student will not be using accommodations for Grade Level, End of Course, NAEP, or Access for ELLs assessments
 - The student is eligible for MAP-A

Reminder: Instructions for adding assessments appear on the **Assessments Quick Start Card** (Form D side)

Assessments – Add Accommodations

State/District Assessments and Accommodations

Assessments Search

Plan Assessments

School Year	Category	Assessment	Section	AIT	Accommodations	Justification
2021-2022	State	Grade Level Assessments	English Language Arts		<input type="checkbox"/> 5	
2021-2022	State	Grade Level Assessments	Math		<input type="checkbox"/>	

Assessment Accommodations

Assessment Accommodation Search : Grade Level Assessments : English Language Arts

Class	Assess	Category	Accommodation Description
<input type="checkbox"/>	<input type="checkbox"/>	Grade Level Assessment	Read Aloud (ELA Reading Passages) - Native Language - Grades 6-8 (ELs Only) (GLA)
<input type="checkbox"/>	<input type="checkbox"/>	Grade Level Assessment	Alternate Response Options (GLA)
<input type="checkbox"/>	<input type="checkbox"/>	Grade Level Assessment	Braille (GLA)
<input type="checkbox"/>	<input type="checkbox"/>	Grade Level Assessment	Large Print (GLA)
<input type="checkbox"/>	<input type="checkbox"/>	Grade Level Assessment	Paper Based Assessment (GLA)

← Back to Events

Print Lock Event Validation Check Add to Plan Save

5. Select the flag for the assessment
6. Select the accommodations
7. Add to Plan

Add Accommodations to Plan

5. Select the flag for the section. The Accommodations section opens displaying the accommodations for the selected assessment.
6. Select the accommodations
7. **Add to Plan**

Tip: if the checkboxes are small on your screen making it difficult to select them, you can zoom your screen to increase the size. Select Control + or Command +

Assessments – Editing

School Year	Category	Assessment	Section	Alt	Accommodations	Justification
2021-2022	State	Grade Level Assessments	English Language Arts		☑	
2021-2022	State	Grade Level Assessments	Math		☐	

Class	Category	Description	Instructional Area	Frequency	Begin Date	End Date
	Grade Level Assessment	Large Print (GLA)				
	Grade Level Assessment	Paper Based Assessment (GLA)				

- The flag is filled when accommodations are saved
- Click the flag to display saved accommodations
- To delete accommodations or assessments, select the delete icon

Editing Assessments and Accommodations

- The flag is filled when accommodations have been added to the plan
- Hover over the flag to display a screen tip list of saved accommodations
- Click the flag to display a list of the saved accommodations
- To delete an accommodation or assessment, select the delete icon (the trash can)
- If an assessment is deleted, all accommodations associated with it are also deleted.
- To add new assessments
 - Select the arrow on Assessment Search
 - Follow the steps covered earlier
- To add new accommodations
 - Select the flag for the assessment
 - Select the arrow on Assessment Accommodation Search to display the list
 - Follow the steps covered earlier

Tip: if the arrows are small on your screen making it difficult to select them, you can zoom your screen to increase the size. Select Control + or Command +

Classroom Accommodations– Select Accommodation Category

- Accommodations for Alternate Form F are entered on the Classroom Accommodations Screen

The screenshot shows the 'Classroom Accommodations' interface. At the top, there is a search bar labeled 'Accommodation Search' with a dropdown arrow. Below it, a 'Select Category' dropdown menu is open, displaying a list of categories: All, Grading, Text, Lectures, Text/Exams, Environment, Assignments, Reinforcement, Pacing, and Other. A red circle with the number '1' is placed over the 'All' option. The main content area shows a table with columns for 'Instructional Area', 'Frequency', 'Begin Date', and 'End Date'. The table currently displays 'No Records Found'. At the bottom, there are buttons for 'Back to Events', 'Print', 'Lock Event', 'Validation Check', 'Add to Plan', and 'Save'.

1. Select a Category or select All

Classroom Accommodations

Classroom Accommodations and Modifications are entered on the Classroom Accommodations screen and print on Alternate Form F, a print only form.

Open the Classroom Accommodations Screen

1. Select a category or select "All"

Classroom Accommodations – Select Accommodations

The screenshot shows a web interface titled "Classroom Accommodations". At the top, there is a search bar labeled "Accommodation Search" with a dropdown menu set to "All". Below the search bar, the "Search Results:" section displays a table with two columns: "Category" and "Accommodation Description". A red circle with the number "2" highlights the checkboxes in the "Category" column. The table lists several accommodations, including "Modify Weight of Course Components", "Use Weekly Grade Checks", "Other: Grading", "Audio", and "Braille". At the bottom right of the table, a red circle with the number "3" highlights the "Add to Plan" button. Other buttons at the bottom include "Print", "Lock Event", "Validation Check", "Save", and "Back to Events".

Category	Accommodation Description
<input type="checkbox"/>	Grading: Modify Weight of Course Components
<input type="checkbox"/>	Grading: Modify Weight of Course Examinations
<input type="checkbox"/>	Grading: Use Weekly Grade Checks
<input type="checkbox"/>	Grading: Other: Grading
<input type="checkbox"/>	Text: Audio
<input type="checkbox"/>	Text: Braille

2. Select each accommodation required
3. Add to Plan

Select Accommodations

The accommodations display in Search Results.

2. Select the accommodations.
3. **Add to Plan.**

Tip: if the checkboxes are small on your screen making it difficult to select them, you can zoom your screen to increase the size. Select Control + or Command +

Classroom Accommodations – Enter Accommodation Details

The screenshot displays the 'Classroom Accommodations' web application. At the top, there is a search bar labeled 'Accommodation Search' with a right-pointing arrow. Below this is a section titled 'Plan Classroom Accommodations' containing a table with the following data:

Category	Description	Instructional Area	Frequency	Begin Date	End Date
Grading	Use Weekly Grade Checks	Select	Select	03/24/2022	03/23/2023
Grading	Other: Grading	Select	Select	03/24/2022	03/23/2023

Below the table is an 'Accommodation Details' section with a red-bordered input field. At the bottom of the interface are several buttons: 'Back to Events', 'Print', 'Lock Event', 'Validation Check', 'Add to Plan', and 'Save'.

- Selected accommodations appear on "Plan Classroom Accommodations"
- Accommodations are grouped by Category

Accommodation Details

The selected accommodations appear on "Plan Classroom Accommodations" grouped by Category.

Each classroom accommodation has 4 required parts:

- A. The accommodation
- B. Instructional Areas (called "Location" on DESE Form F)
- C. Frequency
- D. Begin/End Dates

Enter Accommodation Details – Instructional Areas

Plan Classroom Accommodations

Category	Description	Instructional Area	Frequency	Begin Date	End Date
Grading	Use Weekly Grade Checks	Select 4	Select	03/24/2022	03/23/2023
Grading	Other: Grading	Select	Select	03/24/2022	03/23/2023

Accommodation Details

[← Back to Events](#) [Print](#) [Lock Event](#) [Validation Check](#) [+Add to Plan](#) [Save](#)

4. Click **Select** to choose Instructional areas

Accommodation Details – Instructional Areas

4. Click **Select** to open the Instructional Areas window.

Choose Instructional Areas

5. Select the Instructional Areas where the accommodation will be used
 - a. Must select one, can select multiple
6. If "Other" is selected enter text in Notes field
7. Click OK

Subject	Notes
<input type="checkbox"/> ALL Classes	
<input type="checkbox"/> Language Arts	
<input type="checkbox"/> Mathematics	
<input type="checkbox"/> Science	
<input type="checkbox"/> Social Studies	
<input type="checkbox"/> Health	
<input type="checkbox"/> Fine Arts	
<input type="checkbox"/> PE/Athletics	
<input type="checkbox"/> Reading	
<input checked="" type="checkbox"/> Other	

Enter 'other' Instructional Area here

Ok Cancel

Select Instructional Areas

5. Select the **Instructional Areas** where this accommodation will be used.
 - It is best not to select the checkbox at the top of the list. This selects every option which prints as a lengthy list on Form F and likely includes classes the student is not taking. If the student truly will use this accommodation in *every class*, it is best to select "ALL Classes".
 - At least one is required. Multiple areas can be selected.
 - It is important to carefully consider where an accommodation is needed. "ALL Classes" can be selected but should only be used if the accommodation will really be used in every class.
6. If "Other" is selected, enter the specific area in the **Notes** field. This is not required by Phoenix but is required by DESE and provides the correct information to the parent.
7. When the appropriate areas have been selected, click **OK**.

Tip: if the checkboxes are small on your screen making it difficult to select them, you can zoom your screen to increase the size. Select Control + or Command +

Enter Accommodation Details – Frequency

Plan Classroom Accommodations

Category	Description	Instructional Area	Frequency	Begin Date	End Date
Grading	Use Weekly Grade Checks	Select	Select 8	03/24/2022	03/23/2023
Grading	Other: Grading	Select	Select	03/24/2022	03/23/2023

Accommodation Details

← Back to Events Print Lock Event Validation Check Add to Plan Save

8. Click Select link to choose Frequency

Accommodation Details - Frequency

8. Click the "Select" link to open the Frequency window.

Select Frequency

9. Select one option
10. If "Other" is selected enter specific frequency in Notes in Notes
11. Click OK

Frequency

At least one frequency is required ★

Subject	Notes
<input type="radio"/> Other	<input type="text"/>
<input type="radio"/> Daily	<input type="text"/>
<input type="radio"/> Weekly	<input type="text"/>
<input type="radio"/> Monthly	<input type="text"/>

Ok Cancel

Select Frequency

9. Select one option
10. If "Other" is selected enter the specific frequency in the **Notes** field. This is not required by Phoenix but is required by DESE and provides the correct information to the parent.
11. Select **OK** to close the window.

Tip: if the radio buttons (the circles) are small on your screen making it difficult to select them, you can zoom your screen to increase the size. Select Control + or Command +

Finish Accommodation Details

Classroom Accommodations

Accommodation Search →

Plan Classroom Accommodations

Category	Description	Instructional Area	Frequency	Begin Date	End Date
Grading	Use Weekly Grade Checks	ALL Classes	Weekly	03/24/2022	03/23/2023
Grading	Other: Grading	ALL Classes	Daily	03/24/2022	03/23/2023

Accommodation Details

← Back to Events Print Lock Event Validation Check Add to Plan Save

12. Edit Begin and End Dates if necessary

- Click the date to display a calendar and choose a new date

13. If "Other" was selected as an accommodation, enter the accommodation details in the text box

Accommodation Details – Dates

Start and End Dates fill from the Plan Dates form

12. Can be edited if needed

- Click the date to open the calendar
- Select the new date
- The dates must be within the Plan Date range (between the Initiation Date and the IEP End Date)



13. If "Other" was selected as an accommodation, enter the specific accommodation in the text box. This is required.

Save / Delete Accommodations

Classroom Accommodations

Accommodation Search →

Plan Classroom Accommodations

Category	Description	Instructional Area	Frequency	Begin Date	End Date	
Grading	Use Weekly Grade Checks	ALL Classes	Weekly	03/24/2022	03/23/2023	 15
Grading	Other: Grading	ALL Classes	Daily	03/24/2022	03/23/2023	 15

Accommodation Details

← Back to Events Print Lock Event Validation Check +Add to Plan Save 14

14. After details have been completed, Save

15. Accommodations can be deleted by clicking the Delete icon

Save / Delete Accommodations

14. After the details have been entered, **Save**.
 - a. The accommodations can be saved even if all of the details have not been entered. The details must be complete before the IEP can be locked.
15. Accommodations can be deleted by selecting the Delete icon (the trash can). A confirmation window will open. Click **Yes** to confirm the delete.

Goals Screen

Goals and Objectives/Benchmarks

Goal Search 1 →

Plan Goals + Custom Goal ↓

Type	ESY	PSEC	Goal Name	Measures	Begin Date	End Date	Baseline	Target	Responsible Staff
No Records Found									

← Back to Events Print Lock Event Validation Check +Add to Plan Save

- Goal form is print only
- SSD does not use Goal Search – all goals are Custom Goals

1. Click **+ Custom Goal**

Goals Screen

The goals entered on the Goals Screen print on the Goals form (a print only form).

SSD does not use the Goal Search. All SSD goals are Custom Goals.

1. Select **+Custom Goal**

Goals – Choose Domain/Area of Concern

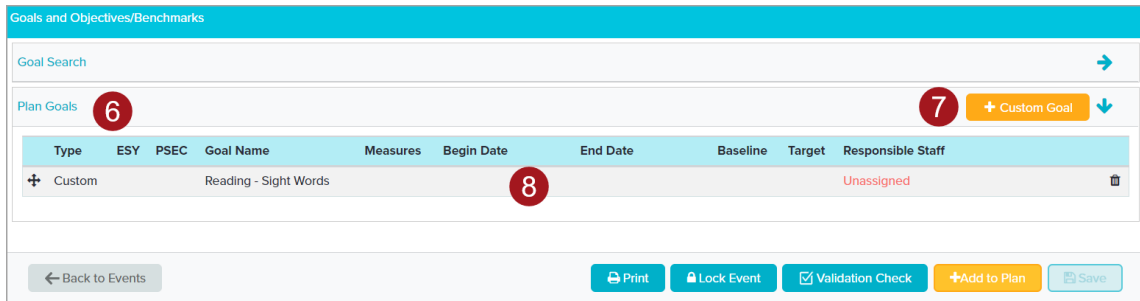
The screenshot shows a web form titled "Goals and Objectives/Benchmarks". At the top right is the "SPECIAL SCHOOL DISTRICT OF ST. LOUIS COUNTY" logo. Below the title bar, there is a "Goal Search" field with a red circle '1' and a right-pointing arrow. Underneath is a "Plan Goals" section with a yellow "+ Custom Goal" button and a right-pointing arrow. The "Goal Details:" section contains three fields: "Select Domain" (dropdown menu with a red circle '2'), "Select AOC" (dropdown menu with a red circle '3'), and "Goal Name:" (text input field with a red circle '4'). At the bottom of the form is a navigation bar with buttons: "← Back to Events", "Print", "Lock Event", "Validation Check", "+Add to Plan" (with a red circle '5'), and "Save".

2. Select the Domain
3. Select Area of Concern
4. Enter unique goal name
5. Add to Plan

Entering a Goal

2. Select the **Domain**
3. Select the **Area of Concern (AOC)**
4. Enter a unique/meaningful **Goal Name**
 - Every goal name must be unique and should be meaningful. The Goal Name does not print on the Goal Page but does on the Progress Report. It also appears on other screens throughout the program and on reports. A meaningful name will help when completing progress reports.
5. **Add to Plan**

Goals – Plan Goals



Type	ESY	PSEC	Goal Name	Measures	Begin Date	End Date	Baseline	Target	Responsible Staff
+	Custom		Reading - Sight Words					Unassigned	

6. Goal appears on the Plan Goals list
7. To add additional goals, click + Custom Goal
8. When ready to complete the goal details click in the row

Goals – Plan Goals

6. The goal appears on the Plan Goals list
7. Add additional goals by clicking **+Custom Goal** and repeating the previous steps
8. When ready to complete the details for a goal, click in the row

Goals – Enter Goal Details

Plan Goals + Custom Goal →

Goal Details: Reading - Sight Words

Goal Text:

1 Type or paste goal text here

Begin Date: 03/17/2022 2 End Date: 03/16/2023 Responsible Staff: unassigned 3 x @ Q

Measure: Select a Measure 4

Baseline: Target:

1. Enter Goal Text in the large text box
2. Edit Dates if necessary

3. Assign Responsible Staff
4. Select Measure

Enter Goal Details

The Goal Details panel opens

1. Enter the goal into the Goal Text box
 - a. Can copy/paste from another document or website such as Goalbook – *remember to right click in the text box and paste as plain text, especially if copying from Goalbook*
2. Edit the **Dates** if necessary
 - a. These dates auto fill from the Plan Dates form
 - b. They can be edited but must be within the Plan Date Range (between the Initiation Date and IEP End Date)
 - c. At least one goal must start on the IEP Initiation Date and at least one must end on the IEP End Date (from the Plan Dates) – doesn't have to be one goal, can be one that starts on the Initiation Date and a different one that ends on the End Date (this is not common with goals)
 - d. If the Plan Dates are changed and saved, the matching dates here will automatically update
3. Assign **Responsible Staff** – this is the person who will be responsible for completing the progress report. The field is not required but all active goals must have a provider assigned for district data. If the goal is starting on the Initiation Date, it is easier to assign the provider here than after the IEP is locked.
4. Select the **Measure**
 - a. The measure should be consistent with the goal.
 - 1) If the goal is measured in percent, the measure should be percent. For example, Johnny will do a skill with 80% accuracy. The measure would be Curriculum Based Measure-Percent, not Curriculum Based Measures-Occurrence, or Whole Number, etc.
 - 2) The measure type selected (percent, occurrence, whole number. etc.) determines the symbol that prints after the score on the progress reports (% , x/y, #, etc.)

Goals – Goal Details

Baseline: **5** Target:

Baseline Narrative:

6

Evaluation Criteria: (At least one required): [Select](#) **7**

Supports the student's post-secondary goals/expectations:

Will also be addressed during ESY

5. Enter Baseline and Target scores
6. Enter Baseline Narrative text
7. Click Select link to choose Evaluation Criteria

Enter Goal Details

5. Enter **Baseline** and **Target** scores
 - a. The numbers entered can be zeros and can be decimals up to the tenths place.
 - b. NOTE: Baseline and Target scores can be entered up to 3 decimal places but only one number prints
6. Enter **Baseline Narrative** text – can be pasted (as plain text)
7. Click the **Select** link to open the Evaluation Criteria window

Goals – Choose Evaluation Criteria

8. Select at least one
 - a. Multiple can be selected
9. If "Other" is selected, enter the specific criterion in the Notes field
10. Click OK

The screenshot shows a dialog box titled "Evaluation Criteria" with a close button in the top right corner. The dialog box contains a list of evaluation criteria, each with a checkbox and a corresponding text input field. The criteria are: Response Charting, Portfolio, Progress Monitoring Tool, Rating Scale, Reading Record, Scoring Guides, Teacher Made Test, Timed Sample, Work Sample, and Other. The "Other" checkbox is checked. A red box highlights the list of criteria, with a red circle "8" next to it. A red circle "9" is next to the "Other" checkbox. A red circle "10" is next to the "OK" button. The "OK" button is highlighted in blue.

Goals – Evaluation Criteria

8. Select at least one option – multiple can be selected
9. If you choose "Other" enter the specific criterion in the required **Notes** field
10. When you have selected all desired options, click **OK**

The window closes

Tip: if the checkboxes are small on your screen making it difficult to select them, you can zoom your screen to increase the size. Select Control + or Command +

Goals – Goal Details

11 Supports the student's post-secondary goals/expectations:

12 Will also be addressed during ESY

+ Add Objective to this goal

11

- Education/Training
- Employment
- Independent Living
- Education/Training, Employment
- Education/Training, Independent Living
- Employment, Independent Living
- Education/Training, Employment, Independent Living

11. If the goal supports a post-secondary goal, check the box
 - a. Select the appropriate area or areas from the menu

12. If the goal will be addressed during ESY, check the ESY box
 - a. The statement prints on the goal page

Enter Goal Details – Post-secondary and ESY

11. If the student has a post-secondary transition plan (Form C), and this goal supports one or more of the post-secondary goals, check the box.
 - a. Select the appropriate area/s from the menu.

12. If the goal will be addressed during ESY, check the ESY box
 - a. The statement prints on the goal page of the IEP
 - b. If the student is eligible for ESY the box must be checked for at least one goal. If none are selected, an amendment or correction must be completed.

Tip: if the checkboxes are small on your screen making it difficult to select them, you can zoom your screen to increase the size. Select Control + or Command +

Goals – Adding Objectives

The screenshot shows a form for adding an objective to a goal. The form includes the following fields and buttons:

- + Add Objective to this goal** (1): A yellow button at the top left.
- Objective Title:** (2): A text input field.
- Sync with Goal:** Radio buttons for Yes and No.
- Delete Objective** (3): A red button.
- Delete** (4): A grey button with a trash icon.
- Objective Text:** (5): A large text area.
- Begin Date:** (6): A date picker showing 05/19/2022.
- End Date:** (7): A date picker showing 05/17/2023.
- Measure:** (8): A dropdown menu with the text "Select a Measure".
- Baseline:** (9): A text input field.
- Target:** (10): A text input field.

1. Click +Add Objective to this goal
2. Enter Objective Title – usually a number or letter
3. Enter Objective Text
4. Edit Dates if necessary
5. Select Measure
6. Enter Baseline and Target scores

Adding Objectives

Objectives are added only for students participating in an alternative state assessment (MAP-A)

1. Click "**+Add Objective to this Goal**"
2. Enter the **Objective Title** – this is usually just a number or a letter
3. Enter the **Objective Text** – can be pasted by right clicking in the text field and choosing "paste as plain text"
4. Edit the **Dates** if necessary
5. Select a **Measure** from the menu
6. Enter **Baseline** and **Target** scores

NOTE: Because the "Sync with Goal" feature does not always work as designed it is best not to use it.

To add another objective, click the +Add Objective to this Goal button again and follow the above steps. It may be necessary to scroll to see the new objective.

To delete an objective, select the Delete button.

Objectives print in the order they appear on the screen (sorted by begin date or in the order entered if the begin dates are the same). Like the goals, the objectives can be moved by using the drag and drop feature. Grab the cross icon, drag the objective into the correct place in the order, then drop it.

Goals – Progress Reporting Section

Reporting Progress

Method of Reporting:

Progress Summary

Other :

Frequency: Refer to Service Summary ▼

Notes:

- Progress Reporting section is complete
- Do not make changes

Goals – Progress Reporting Section

The Progress Reporting section of the goal is complete and should not be changed.

Goals – Save Goal

Supports the student's post-secondary goals/expectations: Education/Training, Employment, Independent Living

Will also be addressed during ESY

[+ Add Objective to this goal](#)

Reporting Progress

Method of Reporting:

Progress Summary Frequency: Refer to Service Summary

Other : Notes:

[← Back to Events](#) [Print](#) [Lock Event](#) [Validation Check](#) [+Add to Plan](#) **Save**

- When goal details have been entered, Save

Goals – Save Goal

When goal details have been entered, **Save**.

A goal can be saved even if all of the details have not been entered. The details must be complete before the IEP can be locked.

Reordering Goals

Goals and Objectives/Benchmarks

Goal Search →

Plan Goals + Custom Goal ↓

Type	ESY	PSEC	Goal Name	Measures	Begin Date	End Date	Baseline	Target	Responsible Staff	
+ Custom	✓		Reading - Sight Words	Checklist Whole Number	03/17/2022	03/16/2023	68	100	TRAIN12 TRAIN12	🗑️
+ Custom		✓	Multiplication Facts	Teacher Made Test Percentage	03/17/2022	03/16/2023	42	90	TRAIN12 TRAIN12	🗑️

← Back to Events Print Lock Event Validation Check +Add to Plan Save

- Goals print in the order they appear on the Plan Goals panel, but the order can be changed
- Click and hold the cross icon for the goal you wish to move
- Drag the goal to the desired location and drop it

Reordering Goals

The goals print in the order they were entered and appear on the Plan Goals list. However, they can be rearranged to print in the order you want using drag and drop.



1. Click and hold the cross icon to grab it
2. Drag the goal to the desired location
3. Drop it
4. The change saves automatically

Deleting Goals

Goals and Objectives/Benchmarks

Goal Search →

Plan Goals + Custom Goal ↓

Type	ESY	PSEC	Goal Name	Measures	Begin Date	End Date	Baseline	Target	Responsible Staff	
+ Custom	✓		Reading - Slight Words	Checklist Whole Number	03/17/2022	03/16/2023	68	100	TRAIN12 TRAIN12	
+ Custom		✓	Multiplication Facts	Teacher Made Test Percentage	03/17/2022	03/16/2023	42	90	TRAIN12 TRAIN12	

← Back to Events Print Lock Event Validation Check +Add to Plan Save

- Goals can be deleted before an IEP is locked and from a Correction if no progress reports have been completed
- Click the Delete icon

Goals – Deleting a Goal

Goals can be deleted from an IEP before it is locked and from a Correction event. However, a goal should never be deleted from an Amendment or if any progress reports have been completed for it.

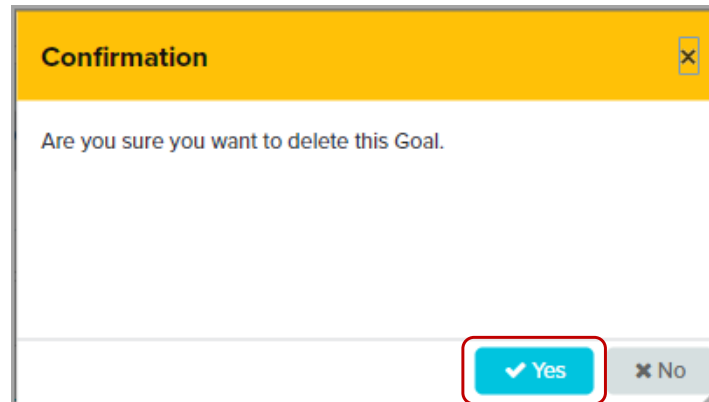
If progress reports have been completed but the goal will no longer be addressed, change the End Date to the last date the goal was/will be addressed. This will ensure all completed progress reports are saved and no further reports are created for the goal (progress reports are created for active goals only).

In a Correction, if the goal was never addressed and no progress reports have been completed, it can be deleted.

To delete a goal, select the Delete icon.

Confirm Delete

- Click "Yes" to confirm the delete



Confirm Delete

The Confirmation window opens. Select **Yes** to confirm the delete.

Pressing "Enter" on your keyboard will close the window but not delete the goal. "Yes" must be clicked to delete the goal.

Services Screen – Add Multiple Services

Instruction, Services And Supports

1 Servicing School: 001 - Pattonville High School

Service Search

2

Service Group Type: School Year Service ESY Service Post Secondary

3 Select Service Group

Select Service Type

4 Search icon Clear

Search Result:

Select	Group Type	Service Group	Service Type
No Records Found			

1. Check the Servicing School – this is the current school
2. School Year Service is selected
3. Select Service Group
4. Click Search icon

Services Screen - Add Multiple Services

Services are entered on the Services screen and print on the Services Summary form.

It is possible to select and add multiple services to the plan at the same time.

1. Check the **Servicing School** at the top
 - a. This should be the student's current school
 - b. Autofills on all new services
 - c. The system uses this school to calculate the LRE (Least Restrictive Environment – Placement)
 - d. If it is not correct, select the correct school from the drop down
2. Select the correct **Service Group Type**
 - a. School Year Service – for services provided during the regular school year. This is the default setting
 - b. ESY Services – for services to be provided during ESY. If the student is eligible for ESY at least one service must be entered in this category. Phoenix will not require it, but it is required by DESE and SSD.
 - c. Post-Secondary – not used by SSD
3. Select the **Service Group**
 - a. Special Education – every student must have at least one Special Education service
 - b. Related Services
 - c. Supplementary Aids and Services
 - d. Supports for School Personnel
4. Click the **Search** icon

Services Screen – Select Multiple Services

Instruction, Services And Supports Servicing School: O01 - Pattonville High School

Service Search

Service Group Type: School Year Service ESY Service Post Secondary

Special Education Select Service Type

Search Result:

Select	Group Type	Service Group	Service Type
<input type="checkbox"/>	REGULAR	Special Education	ADAPTED PHYSICAL EDUCATION
<input type="checkbox"/>	REGULAR	Special Education	INST IN APPLIED BEHAVIOR PRINCIPLES
<input type="checkbox"/>	REGULAR	Special Education	INST IN COMMUNICATION
<input checked="" type="checkbox"/>	REGULAR	Special Education	INST IN COMMUNITY SKILLS
<input type="checkbox"/>	REGULAR	Special Education	INST IN FUNCTIONAL ACADEMICS
<input type="checkbox"/>	REGULAR	Special Education	INST IN INDEPENDENT LIVING SKILLS
<input checked="" type="checkbox"/>	REGULAR	Special Education	INST IN JOB SKILLS
<input type="checkbox"/>	REGULAR	Special Education	INST IN MATH

← Back to Events

6. Select the desired services
7. Scroll to see additional services on the list
8. Add to Plan

Services Screen - Select Multiple Services

6. Select the desired services
7. The list continues below. Scroll to view and select additional services.
8. Add to Plan

All services are added to the Plan Services table.

When a service is chosen that was previously added, a message may pop up confirming you want to enter the same service again. If you do, click **Yes**. If you don't, click **No**.

The list includes services for the selected Service Group only. To add additional services, repeat the steps.

Services Screen – Add One Service

Instruction, Services And Supports

1 Servicing School: 001 - Pattonville High School

2 Service Search

Service Group Type: School Year Service ESY Service Post Secondary

3 Select Service Group

4 Select Service Type

5

Search Result:

Select	Group Type	Service Group	Service Type
No Records Found			

1. Check the Servicing School – this is the current school
2. School Year Service is selected
3. Select Service Group
4. Select Service Type
5. Click Search icon

Services Screen - Add One Service

Services are entered on the Services screen and print on the Services Summary form.

Services can be added to the plan one at a time or multiple at once. These steps are to add one service.

1. Check the **Servicing School** at the top
 - a. This should be the student's current school
 - b. Autofills on all new services
 - c. The system uses this school to calculate the LRE (Least Restrictive Environment – Placement)
 - d. If it is not correct, select the correct school from the drop down
2. Select the correct **Service Group Type**
 - a. School Year Service – for services provided during the regular school year. This is the default setting
 - b. ESY Services – for services to be provided during ESY. If the student is eligible for ESY at least one service must be entered in this category. Phoenix will not require it, but it is required by DESE and SSD.
 - c. Post-Secondary – not used by SSD
3. Select the **Service Group**
 - a. Special Education – every student must have at least one Special Education service
 - b. Related Services
 - c. Supplementary Aids and Services
 - d. Supports for School Personnel
4. Select **Service Type**
 - a. Options will vary based on selection made for Service Group
5. Click the **Search** icon

Services – Select Service

Instruction, Services And Supports Servicing School: O01 - Pattonville High School

Service Search ↓

Service Group Type: School Year Service ESY Service Post Secondary

Special Education INST IN MATH [Search] [Clear]

Search Result:

Select	Group Type	Service Group	Service Type
<input checked="" type="checkbox"/> 6	REGULAR	Special Education	INST IN MATH

7

← Back to Events [Print] [Lock Event] [Validation Check] **+Add to Plan** [Save]

6. Select the Service

7. Add to Plan

Select Service

The selected service appears in Search Result

6. Select the **Service** – click the box in front of the name of the service

7. Add to Plan

The selected service is added to the Plan Services table.

When a service is chosen that was previously added, a message may pop up confirming you want to enter the same service again. If you do, click **Yes**. If you don't, click **No**.

Tip: if the box is small on your screen making it difficult to select, you can zoom your screen to increase the size. Select Control + or Command +

Services on Plan Services

Plan Services

Special Education

SYS	ESY	PSEC	Service Type	Frequency	Setting	Begin Date	End Date	Servicing School	Provider	
+	✓		INST IN MATH	min/Weekly		03/17/2022	03/16/2023	O01 - Pattonville High School	Unassigned	🗑️
+	✓		INST IN JOB SKILLS	min/Weekly		03/17/2022	03/16/2023	O01 - Pattonville High School	Unassigned	🗑️
+	✓		INST IN READING	min/Weekly		03/17/2022	03/16/2023	O01 - Pattonville High School	Unassigned	🗑️

← Back to Events Print Lock Event Validation Check Add to Plan Save

- The selected services appear on Plan Services
- Click in a row to open Service Details

Services on Plan Services

The selected services are added to the Plan Services panel.

If a specific service is needed more than once, for example the student will receive Instruction in Math in both the Special Education and Regular Education settings, repeat the steps to add additional services.

When a service is chosen that was previously added, a message may pop up confirming you want to enter the same service again. If you do, click **Yes**. If you don't, click **No**.

When ready to complete the details for a service, click in the row

Services Screen – Service Details: Dates

Service Details: INST IN MATH

Begin Date : 03/17/2022 End Date : 03/16/2023 Provider : unassigned

Duration : Units : Minutes Frequency : Weekly Total min/Weekly :

Setting : Select Servicing School : O01 - Pattonville High School

← Back to Events Print Lock Event Validation Check +Add to Plan Save

1. Dates are prefilled from the Plan Date form but can be edited

- At least one service must start on the IEP Initiation Date
- At least one service must end on the IEP End Date
- Revise the dates for transitioning students and ESY services
- To change the dates, click the calendar icon and choose the new date from the calendar that opens

Service Detail Window – Service Dates

1. Begin and End Dates are prefilled with the Plan Dates

- Can be edited here if the service either starts or ends at a different time than the IEP
- Must be within the Plan Date Range (between the Initiation Date and IEP End Date)

At least one service must begin on the IEP Initiation Date and at least one must end on the IEP End Date (from Plan Dates). It doesn't have to be one service, it can be different services.

Pay particular attention to the dates when entering services for students transitioning from one school to another (such as moving from elementary to middle school or middle school to high school).

- Enter two separate sets of services, one for each school/school year. The services for the current school/school year must all end on the same day then the services for the new school/school year must start the next day.
- Check the dates carefully to avoid errors when the LRE (placement) is calculated
 - There should be no gap between the end of services for one year and the start of services for the next (use consecutive dates)
 - This would cause an incorrect placement to be calculated for the time between the school years
 - The dates of the services should not overlap
 - All services for the first year should end the day before services for the next year begin
 - Overlap causes the amount of service to be doubled when the new services begin
 - LRE will be incorrect
 - *A service can continue for both years but if the Servicing School will be different for the second year, the service must be entered twice*

Note for High school teachers: At least one service must continue to the end of the IEP even if the student is graduating.

- When the student graduates or ages out the Student Data Secretary will exit the student from Phoenix
- Once students graduate, they are no longer eligible to receive special education services

Services Screen – Service Details

Service Details: INST IN MATH

Begin Date: 03/17/2022 End Date: 03/16/2023 Provider: unassigned

Duration: 3 Units: Minutes Frequency: Weekly Total min/Weekly:

Setting: Select Servicing School: 001 - Pattonville High School

← Back to Events Print Lock Event Validation Check +Add to Plan Save

2. Assign **Provider**, if known
3. Enter **Duration**
4. Select **Frequency**
5. Select **Setting**
6. Check **Servicing School** – school where THIS service will be provided
7. **Save**

Service Detail Window – Complete Service Details

2. Assign the **Provider**, if known
 - a. If the service starts on the Initiation Date it is easiest to do it here
3. Enter **Duration** – the minutes of service to be provided
4. Select **Frequency**
 - a. Weekly is the default
 - b. Monthly is an option
5. Select **Setting**
 - a. Special Ed
 - b. Regular Ed
 - c. Home ECSE – for Early Childhood only
6. **Servicing School** – autofills with the Servicing School from the top of the screen
 - a. This is the school where THIS service will be provided
 - b. If the student is transitioning (such as from middle school to high school) this would be the current school (middle school) for the first set of services and the new school (high school) for the second set of services. This ensures the LRE is calculated correctly for each school.
7. When details have been entered, **Save**

A service can be saved even if all of the details have not been entered. The details must be complete before the IEP can be locked.

Services – Plan Services

Instruction, Services And Supports Servicing School: O01 - Pattonville High School

Service Search Add additional service →

Plan Services Accept LRE ↓

Special Education

SYS	ESY	PSEC	Service Type	Frequency	Setting	Begin Date	End Date	Servicing School	Provider
+	✓		INST IN MATH	271 min/Weekly	Regular Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN12 TRAIN12
+	✓		INST IN JOB SKILLS	min/Weekly		03/17/2022	03/16/2023	O01 - Pattonville High School	Unassigned
+	✓		INST IN READING	min/Weekly		03/17/2022	03/16/2023	O01 - Pattonville High School	Unassigned

← Back to Events Print Lock Event Validation Check Add to Plan Save

- After saving a service, the Accept LRE button appears
- Accept LRE after ALL services have been finalized
- Add new service by clicking arrow on Services Search

Plan Services

Each time a service is saved, the Accept LRE button appears. It does not have to be done after every service.

It is best practice to wait until ALL services have been entered and finalized before accepting the LRE. If any changes are made to services (service added, deleted, or changed) the Accept LRE button will reappear. It can be done just before locking. The event cannot be locked if the LRE has not been "accepted".

Clicking the Accept LRE button moves you to the Federal 4 Summary screen. This is where the LRE is actually "accepted". This will be covered later in this training.

To add a new service, click the arrow on Services Search and follow previous steps.

Services – ESY Services

- ESY Services are entered on Services Screen and print on Form B

Instruction, Services And Supports Servicing School: 001 - Pattonville High School

Service Search

Service Group Type: School Year Service ESY Service Post Secondary

ESY - Special Education Select Service Type Search Clear

Search Result:

Select	Group Type	Service Group	Service Type
<input type="checkbox"/>	ESY	ESY - Special Education	ADAPTED PHYSICAL EDUCATION
<input type="checkbox"/>	ESY	ESY - Special Education	INST IN JOB SKILLS
<input checked="" type="checkbox"/>	ESY	ESY - Special Education	INST IN MATH

← Back to Events Print Lock Event Validation Check Add to Plan Save

1. Select the ESY button
2. Search for and select the service/services
3. Add to Plan

ESY Services

It is important that the ESY Services are entered using the ESY Services option so they are not calculated in the placement and they print on Form B

Reminder: ESY Services are entered on the Services Screen and print on Form B

To add an ESY Service

1. In Service Group Type, select **ESY Services**
2. Search for and select the service or services
 - a. Single or multiple services can be added
3. **Add to Plan**

When a service is chosen that was previously entered a message may pop up confirming you want to enter the same service again. Click **Yes**.

Services – ESY Details

Service Details : INST IN MATH

4

Begin Date : 06/06/2022 End Date : 07/01/2022 Provider : unassigned

Duration : Units : Minutes Frequency : Weekly Total min/Weekly :

Setting : Select Servicing School : O01 - Pattonville High School

4. Edit Begin and End Dates to match ESY dates

- a. Enter all other details
- b. Provider can be left unassigned
- c. Servicing School can be left as current school
- d. When all details have been added, Save

Enter the Details of the ESY Service

4. Begin and End Dates are filled from the Plan Dates screen

- Begin and End Dates that autofill are for the length of the IEP – *they must be changed to ESY dates*
 - If the specific dates are not known at the time of the IEP or Amendment, enter the most accurate dates possible - can be based on the ESY dates from the previous year
 - "ESY dates may be adjusted" prints on Form B
 - All dates must be within the Plan Date range (cannot enter a date after the expiration of the IEP)
 - If the current IEP expires before ESY, a new IEP must be completed – cannot do an Amendment
 - When editing the End Date be very careful to choose the correct year

The Provider can be left unassigned. The ESY staff should take care of it.

The Servicing School can be left as the student's current school. It can be edited on Staff Management by the ESY staff if necessary.

When all details are complete, **Save**

Services – ESY Services

Plan Services Accept LRE

Special Education										
SYS	ESY	PSEC	Service Type	Frequency	Setting	Begin Date	End Date	Servicing School	Provider	
+	✓		INST IN MATH	120 min/Weekly	Special Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN12 TRAIN12	🗑
+	✓		INST IN JOB SKILLS	500 min/Weekly	Regular Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN305 TRAIN305	🗑
+	✓		INST IN READING	120 min/Weekly	Special Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN12 TRAIN12	🗑

ESY - Special Education										
SYS	ESY	PSEC	Service Type	Frequency	Setting	Begin Date	End Date	Servicing School	Provider	
+	✓		INST IN MATH	60 min/Weekly	Special Education	06/06/2022	07/01/2022	O01 - Pattonville High School	Unassigned	🗑

← Back to Events Print Lock Event Validation Check Add to Plan Save

- ESY services appear on a separate list from School Year Services

ESY Services

After saving, the ESY services appear on a separate table from the School Year Services and are marked with a check in the ESY column.

Reminder: ESY services are not calculated into the student’s placement (LRE) so they must be entered using the appropriate Service Group and have the correct Begin and End Dates.

Reordering Services

- The Services print in the order they appear on the screen – order can be changed

Plan Services Accept LRE

Special Education

SYS	ESY	PSEC	Service Type	Frequency	Setting	Begin Date	End Date	Servicing School	Provider	
+			INST IN MATH	120 min/Weekly	Special Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN12 TRAIN12	✕
+			INST IN JOB SKILLS	500 min/Weekly	Regular Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN305 TRAIN305	✕
+			INST IN READING	120 min/Weekly	Special Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN12 TRAIN12	✕

ESY - Special Education

SYS	ESY	PSEC	Service Type	Frequency	Setting	Begin Date	End Date	Servicing School	Provider	
+	✓		INST IN MATH	60 min/Weekly	Special Education	06/06/2022	07/01/2022	O01 - Pattonville High School	Unassigned	✕

← Back to Events Print Lock Event Validation Check Add to Plan Save

- Select the cross icon to use the drag and drop feature
- Services can only be moved within the same group

Changing the Print Order of the Services

The services print in the order they appear on the screen.

If a different print order is desired, they can be rearranged using the drag and drop feature.

1. Click and hold the cross icon to grab it.
2. Drag the service to the desired location
3. Drop it
4. The change saves automatically

Order can only be changed within a Service Group.

Deleting Services

SYS	ESY	PSEC	Service Type	Frequency	Setting	Begin Date	End Date	Servicing School	Provider	
+	✓		INST IN MATH	120 min/wk	Special Education	08/12/2019	07/31/2020	O01 - Pattonville High School	TRAIN12 TRAIN12	
+	✓		INST IN READING	271 min/wk	Regular Education	08/12/2019	07/31/2020	O01 - Pattonville High School	TRAIN12 TRAIN12	

- Select the Delete icon to delete a service
- Confirm the delete

Deleting Services

To delete a service

1. Select the **Delete** icon (the trash can)
2. The Confirmation window appears
3. Select **Yes** to confirm the delete

When a service is deleted, the "Accept LRE" button appears. The LRE must be "accepted" before the IEP is locked.

Accepting the LRE

- After ALL services have been entered and finalized – click Accept LRE on Services screen

The screenshot shows the 'Plan Services' interface. At the top right, there is a red button labeled 'Accept LRE' with a checkmark icon. Below this is a table titled 'Special Education' with the following columns: SYS, ESY, PSEC, Service Type, Frequency, Setting, Begin Date, End Date, Servicing School, and Provider. The table contains three rows of service data. At the bottom of the interface, there are several action buttons: 'Back to Events', 'Print', 'Lock Event', 'Validation Check', 'Add to Plan', and 'Save'.

SYS	ESY	PSEC	Service Type	Frequency	Setting	Begin Date	End Date	Servicing School	Provider
+ ✓			INST IN MATH	120 min/Weekly	Special Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN12 TRAIN12
+ ✓			INST IN JOB SKILLS	500 min/Weekly	Regular Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN305 TRAIN305
+ ✓			INST IN READING	120 min/Weekly	Special Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN12 TRAIN12

Accepting the LRE

After ALL services have been entered and finalized, click the Accept LRE button on the Services screen or go directly to the Federal 4 Summary.

Federal 4 Summary – Accept LRE

Instruction, Services and Supports

Special Education Services

Special Education									
SYS	ESY	PSEC	Service Type	Frequency	Setting	Begin Date	End Date	Servicing School	Provider
+	✓		INST IN MATH	120 min/wk	Special Education	08/12/2019	07/31/2020	O01 - Pattonville High School	TRAIN12 TRAIN12
+	✓		INST IN READING	271 min/wk	Regular Education	08/12/2019	07/31/2020	O01 - Pattonville High School	TRAIN12 TRAIN12

Least Restrictive Environment

LRE Accepted Manual Override

Begin Date	End Date	Servicing School	Total GE Minutes	Total Instr. Minutes	SE SVC Minutes	Total SVC Minutes	SE %	GE %	SVC %	LRE Placement
08/12/2019	07/31/2020	O01 - Pattonville High School	1900	1900	120	391	6	94	21	Inside regular class at least 80% of time

- Federal 4 Summary Screen opens
- Click LRE Accepted button
- The LRE must be "Accepted" in all IEP Amendment and IEP Correction events even if services were not changed

Federal 4 Summary – Accept the LRE

After clicking the Accept LRE button, the Federal 4 Summary screen opens.

Review the information in the LRE section.

- If services were entered with different start and end dates (such as for transitioning students) there will be multiple lines on the LRE table – one line for each time period
- Gen Ed and Special Ed percentages are calculated for each time period entered on the Services Screen. Check the percents to be sure they make sense based on the student's services
 - If something doesn't look right - such as special ed percent over 100 – go back to the Services Screen to double check dates and minutes (Duration)
 - Make note of the Special Ed and General Ed percents. For K-12 students, they will be entered on the Placement Considerations form.
- For K-12 students, the LRE Placement category is prefilled based upon the GE % calculated after inputting services and the servicing school but can be changed using a Manual Override.
- For EC students, the LRE Placement category is blank. A Manual Override must be done to select an EC placement category. Click in the Manual Override box then click Select to display the list of categories.

After reviewing the information, select the LRE Accepted button. The button is visible whenever the LRE must be accepted. The IEP cannot be locked if the LRE has not been accepted. The LRE Accepted button is not used for a Manual Override.

Note for ECSE and elementary: If the student will turn 6 during the IEP, the LRE screen will display one placement entry for the time the student is 5 and another that starts on the student's 6th birthday. This is correct and cannot be changed.

Important: The placement calculated on this screen is what will be reported to the state and partner districts. It is extremely important this screen is accurate.

NOTE: The LRE must be "Accepted" in ALL IEP Amendment and IEP Correction events even if the services were not changed. Open the Federal 4 Summary and click the "LRE Accepted" button.

Overriding the Calculated LRE

Some LRE information can be changed by using the Manual Override

- Manual Override is used to
 - Correct placement not based on percents
 - SSD Schools, Homebound, Early Childhood
 - Adjust minutes for part-time students
 - Recalculates the LRE
- Manual Override must be completed again in IEP Amendments and IEP Corrections– it does not copy

LRE-Manual Override

The calculated LRE can be changed using the Manual Override.

The Manual Override is used to

- Correct placement when not based on percents – such as SSD Schools (Public separate school), Homebound (Home/Hospital) and Early Childhood (several options available – should match the option selected on the EC Placement Considerations page)
- Adjust the Gen Ed and Instructional minutes (the building's Instructional minutes per week) for part time students – LRE will calculate correctly (Total GE Mins must equal Total Instr. Mins)

Note: The instructional minutes for each school are based on the data provided by the state. They should only be changed if the student is attending part time.

The "Total GE Mins" and "Total Instr. Mins" fields must always be the same. If one is changed, either by the user or the system, the other must be changed so they match. This is for data and reporting accuracy.

Reminder: If Manual Override is used in an IEP, an IEP Amendment, or an IEP Correction, it must be redone for every Amendment or Correction done for that IEP. The system does not copy this information into the IEP Amendment or IEP Correction. This is particularly important for Early Childhood students and students in an SSD School.

Manually Updating LRE Placement

Least Restrictive Environment

Manual Override

Begin Date	End Date	Servicing School	Total GE Minutes	Total Instr. Minutes	SE SVC Minutes	Total SVC Minutes	SE %	GE %	SVC %	LRE Placement
03/17/2022	03/16/2023	O01 - Pattonville High School	1925	1925	240	740	12	88	38	Inside regular class at least 80% of time

- Check Manual Override box
- Some fields become editable
 - Servicing School – should not need to be changed if dates are correct and schools were selected correctly on each service
 - Total GE Minutes and Total Instr. Minutes – change only if the student does not attend school full time – the two fields must match
 - LRE Placement – Placement Category which defaults to the category based on percent in general education

LRE – Manual Override – Updating LRE Placement category

To begin the Manual Override process, check the Manual Override box

- The Servicing School is based on the school entered on each service on the Services screen. It should not need to be changed here.
- Total General Education (GE) and Total Instructional (Instr.) Minutes are provided by DESE and should only be changed if the student does not attend school for a full day. If one is changed the other must be changed to match. They must be equal for data to calculate correctly (they are each used for separate data calculations).
- LRE Placement
 - For K-12 students: the category entered is based on percent in general education
 - For EC students: there is no category entered. A link to "Select" the correct category appears when the Manual Override box is checked. The link is used to display the list of options. Choose the appropriate EC option which should match the option selected on the EC Placement Considerations page.

Edit LRE Details

Least Restrictive Environment

Manual Override

Begin Date	End Date	Servicing School	Total GE Minutes	Total Instr. Minutes	SE SVC Minutes	Total SVC Minutes	SE %	GE %	SVC %	LRE Placement
03/17/2022	03/16/2023	001 - Pattonville High School	1925	1925	240	740	12	88	38	Inside regular class at least 80% of time

To edit the LRE Details

- Servicing School: Click the current school and select the correct school from the list
- Minutes: Click the minutes for *each* field. Enter new minutes in both text boxes. The two fields MUST be the same for data purposes.
- LRE Placement: Click the current placement, or "Select", and select the correct category from the list

Edit LRE Details

To change Servicing School, click the name of the current school then select the correct school from the list.

To edit the Total GE and Total Instr. Minutes, click the current minutes. A text box opens. Enter the new minutes in the box. Be sure to change BOTH fields. They MUST be the same for data to calculate correctly.

To correct the placement category, click the name of the current category, or "Select" for EC students, then choose the appropriate placement from the drop down.

- School Age placements
 - Inside regular class at least 80% of time*
 - Inside regular class 40% to 79% of time*
 - Inside regular class less than 40% of time*
 - Public separate school (day) facility (*Used for SSD Schools*)
 - Private separate school (day) facility
 - Public residential facility
 - Private residential facility
 - Home/hospital (*Homebound*)

*Default based on the General Education percent

- Early Childhood placements (can only be selected after checking the Manual Override box)
 - Early Childhood setting
 - Early Childhood special education setting
 - Home
 - Part-time early childhood/Part-time early childhood special education
 - Residential facility
 - Separate school
 - Itinerant

LRE Reminders

- An error on the LRE is a result of errors on the Services screen
 - Error must be corrected on Services screen
- Manual override is only used for
 - Placements not based on General Ed service percent
 - Students who attend less than full day
 - Early Childhood students
- If manual override is used in an IEP, IEP Amendment, or IEP Correction, it must be redone in any IEP Amendment or IEP Correction completed for this IEP

LRE Reminders:

- If there are errors in the dates or percentages on the LRE table it is because the information is not correct on the Services screen. The errors must be corrected on that screen.
- Manual Override is only used for placements that are not based on the General Education service percent, students who attend school less than a full day, and Early Childhood students.
- If a manual override is used for any reason in an IEP, IEP Amendment, or IEP Correction, *it must be done again for any future Amendment or Correction of that IEP*

You should always:

- Confirm the "Total GE Mins" and "Total Instr. Mins" are equal
- Check the General Ed and Special Ed percents to be sure they make sense based on the student's services

Federal 4 Summary – Goals and Services

Goals and Objectives/Benchmarks									
Type	ESY	PSEC	Goal Name	Measures	Begin Date	End Date	Baseline	Target	Responsible Staff
+ Custom	✓		Reading - Sight Words	Checklist Whole Number	03/17/2022	03/16/2023	68,000	100,000	TRAIN12 TRAIN12
+ Custom		✓	Multiplication Facts	Teacher Made Test Percentage	03/17/2022	03/16/2023	42,000	90,000	TRAIN12 TRAIN12

Instruction, Services and Supports									
Special Education Services									
Special Education									
SYS	ESY	PSEC	Service Type	Frequency	Setting	Begin Date	End Date	Servicing School	Provider
+ ✓			INST IN MATH	120 min/Weekly	Special Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN12 TRAIN12
+ ✓			INST IN JOB SKILLS	500 min/Weekly	Regular Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN305 TRAIN305
+ ✓			INST IN READING	120 min/Weekly	Special Education	03/17/2022	03/16/2023	O01 - Pattonville High School	TRAIN12 TRAIN12

- Some fields are editable
- Goals and Services can be reordered and deleted

Federal 4 Summary – Goals and Services

The Federal 4 Summary displays all goals, services, state assessments and accommodations, and classroom accommodations in the order they were entered in the IEP. It is a good place to review this information prior to locking the IEP.

In the Goals and Services sections, some fields are editable. You can change the Begin Date, End Date, and the Responsible Staff or Provider by clicking the link.

The goals and services can be reordered (print order) by using the drag and drop feature or deleted by clicking the trash can icon.

All other changes to the goals or services must be made on the screens.

Federal 4 Summary – Assessments and Classroom Accommodations

- View Assessment Accommodations by hovering over filled flag

School Year	Category	Assessment	Section	Alt	Accommodations	Justification
		el Assessments	English Language Arts			
		el Assessments	Math			
		el Assessments	Science			

Category	Description	Instructional Area	Frequency	Begin Date	End Date
Grading	Use Weekly Grade Checks	Mathematics +1 Others	Weekly	03/17/2022	03/16/2023
Grading	Other: Grading	Language Arts +1 Others	Daily	03/17/2022	03/16/2023

Accommodation Details:

← Back to Events Print Lock Event Validation Check

- Can edit some Classroom Accommodation fields and delete

Federal 4 Summary – Assessments and Classroom Accommodations

If Assessment Accommodations have been entered in the IEP, the accommodations flag is filled, and the accommodations can be viewed by hovering over the filled flag.

Classroom Accommodation details can be edited including Instructional Areas, Frequency, Begin Date, and End Date. Click the link and make the required changes.

Assessments, along with all accommodations selected for them, and Classroom Accommodations can be deleted by selecting the trash can icon.

Annual IEP – Services Summary



SERVICES SUMMARY

Student: Training Student 45 Date of Birth: 03/31/2003 Meeting Date: 08/02/2019

A Does the student require an ECSE placement form? Yes No

4. Reporting Progress

When progress will be reported to parent(s)/guardian(s):

Bi-Quarterly Quarterly Trimester Semester Other: _____

B Program Modification and Accommodations:

Documented on Alternate Form F (Classroom Accommodations)

None

C Supports for School Personnel:

Documented Above

None

6. Transportation as a Related Service

School Year Services entered on Services Screen print on Services Summary

- A. If EC Placement page is required select **Yes** at top
- B. If Classroom Accommodations were entered, **Documented on Alternate Form F** must be selected or they will not print
- C. Make a selection for Supports for School Personnel

Services Summary

Services entered on the Services screen print on this form above the Program Modifications and Accommodations section

- A. If the student is between ages 2 and 6 and requires the ECSE placement form, select **Yes** at the top. If the student is age 7 or older this question is disabled.

Complete all required fields

Select how often progress will be reported – usually based on district’s reporting schedule but can be more frequent based on the IEP Team’s decision.

- B. If student will use accommodations in the classroom (accommodations have been, or will be, entered on the Classroom Accommodations screen), select **Documented on Alternate Form F (Classroom Accommodations)**. The Alternate Form F Decision form appears on the Forms List Panel and Overview.
 - Note: If "Documented on Alternate Form F" is not selected, the Alternate Form F Decision Form will not be created. Alternate Form F will not print, and no classroom accommodations will be included in the IEP even if they are selected on the Classroom Accommodations screen. This is one of the mistakes the Service Desk deals with frequently.
 - Note: Alternate Form F is a print only form. The accommodations are entered on the Classroom Accommodations screen.
- C. If any Supports for School Personnel are entered on the Services Screen, choose "Documented Above"
 - Note: Supports for School Personnel are entered on Services Screen and print on the Services Summary

Save

Alternate Form F Decision

ALTERNATE FORM F DECISION

Include Alternate Form F in print layout.

- Used to indicate Alternate Form F should be printed
- If this is not selected Classroom Accommodations entered will not be included in the IEP
 - Correction event must be completed

Alternate Form F Decision

Used to determine if Alternate Form F (classroom accommodations/modifications) should be printed.

Does not appear if "None" is selected in the Program Modifications and Accommodations section of the Services Summary

To print classroom accommodations/modifications, select **Print Alternate Form F**

Save

Note: Alternate Form F will not print, even if accommodations have been entered on the Classroom Accommodations screen, if Alternate Form F Decision is not created and completed.

If you print the IEP and Form F is not included, it is usually because you marked "None" on the Services Summary. Return to the form and confirm you have selected "Documented on Alternate Form F"

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Annual IEP – Services Summary Transportation



6. Transportation as a Related Service

Please use the following guiding questions as the IEP team considers transportation as a related service.

- NOTE: The need for transportation as a related service must be documented in the PLAAFP.

- Does the student's educational disability require specialized equipment to be used on the bus? Yes No
- Does the student's educational disability require him/her to be accompanied by or have access to specific personnel while on the bus? Yes No
- Does the student have a medical intervention plan related to the educational disability as documented in the PLAAFP? Yes No
- Does the student have an individualized behavior intervention plan, as documented in the PLAAFP, related to the educational disability which has an impact on transportation as a related service? Yes No

The student does not require transportation as a related service.
 The student requires transportation as a necessary related service.

The student needs accommodations or modifications for transportation No Yes

<input type="checkbox"/> Aide	<input type="checkbox"/> Wheelchair Lift	<input type="checkbox"/> Behavior Intervention Plan	<input type="checkbox"/> Other:
<input type="checkbox"/> AC	<input type="checkbox"/> Seat Vest	<input type="checkbox"/> Special Training Needed	
<input type="checkbox"/> Curb-to-Curb	<input type="checkbox"/> Seat Belt	<input type="checkbox"/> Medical Transportation Plan	

Date Transportation Form Completed:

Transportation End Date:

- Answer transportation guiding questions
- Indicate if student requires transportation
- If student does require transportation
 - Complete transportation section
 - Transportation Decision Form is created

Services Summary – Transportation section

Answer the Transportation Guiding Questions

These questions must be answered

- The responses selected have no impact on the ability to choose either option for transportation as a related service. This decision is made by the IEP team no matter how these questions are answered.
- The questions do not print on the form – a copy of the questions is provided during training and can be downloaded from Phoenix Help

Indicate if student requires transportation as a related service

If transportation as a related service is required

- Complete the transportation section
- The transportation decision form appears on the Forms List Panel and Overview

Transportation Decision Form

TRANSPORTATION DECISION

The provider of transportation will be:

- Special School District - (Requires Transportation Form)
- Partner District - (Requires Transportation Form)
- Parent
- Public Transportation
- VICC
- Not Needed

- Indicates who is providing transportation
- If SSD or Partner District is chosen, Transportation form is created
- Neither forms print with the IEP

Transportation Decision

The decision form is used to determine if the Transportation form is needed

- If Special School District or Partner District is chosen, the Transportation form is created and appears on the Forms List Panel and Overview
- If any other option is selected, the Transportation form is not created
- The Transportation Decision form and the Transportation form do not print with the IEP. They have a separate print layout used by the secretary to enter information into the transportation system.

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Transportation Form



TRANSPORTATION AS A RELATED SERVICE

Effective Date:
End Date:

Student with Transportation as a Related Service

SSD ID#: 100045 Student: Training Student 45 Disability:

Attending School Name:

Home School Name:

Attending School Address:

City: State: Zip:

Home Contact Name: Home Phone:

- Use "Add" only for student who is not currently receiving transportation
- Transportation accommodations do not appear on form
- Must enter secretary's email address – email sent when IEP, Amendment or Correction is locked
- Does not print with IEP – has separate print layout

Transportation Form

Used for students who receive transportation as a related service when the transportation is provided by either SSD or the Partner district

Transportation Accommodations can only be viewed and edited on the Services Summary Form (they are an IEP team decision and can only be added or changed in an IEP or Amendment).

Choose the "Action"

- "Add" is used for a student who is not currently receiving Transportation
- "Review for changes" is used for all others, even if nothing is changing on the form

Enter your SSD administrator's secretary's email address on the form. This is the secretary who is responsible for entering the information in the transportation system.

- The secretary will only receive one email – when the IEP, Amendment or Correction is locked.
- It is very important if you are adding transportation for the first time for this student, or you are making changes to the form, that you call or email your secretary AS SOON AS the decision is made to add or change transportation. If you wait until the IEP is locked for the system to send the email it is possible transportation for the student will be delayed.

The Transportation Form is an internal SSD form. It is not included with the IEP when it is printed and is not provided to the parent. If you wish to print a copy of the form, choose "Transportation" from the Print Layout Chooser. This will print only the Transportation and Services Summary forms. Transportation accommodations print on Services Summary.

Note: If this form has been created, completed and saved but is no longer needed, it can be reset so it is not included in the final, locked IEP. Instructions are on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Annual IEP – Placement (K12)

PLACEMENT CONSIDERATIONS

Student: Training Student 45 Date of Birth: 03/31/2003 Meeting Date: 08/02/2019

7. REGULAR EDUCATION PARTICIPATION

Extent of Participation in Regular Education:

For K12: The regular education environment includes all academic instruction as well as meals, recess, assemblies, field trips, etc. Yes No

Will this student participate 100% of the time with nondisabled peers in the regular education environment?

If no:

a. To what extent will the student not participate in a regular education environment? (minutes or % of special education and related service minutes on the IEP in special education settings)

The student will participate in regular education % and special education % of the time.

b. Describe the reasons why the IEP team determined that provision of services in the regular education environment was not appropriate for the student.

Participation in Regular Physical Education:

- When "No" is selected for 100% participation, the next section becomes required
 - Enter percentages from Federal 4 Summary
 - Complete reason full participation is not appropriate
- Complete other required fields
- Placement Continuum selection must match LRE on Federal 4 Summary

Placement Considerations for K-12 (School Age) students

Three Placement forms are available on the Forms List Panel and Overview

- First is required, the others are optional and used if the placement changes during this IEP
- If the student is ECSE or in Kindergarten, six forms may appear – three for ECSE and 3 for K12 - only one is required

Answer question about 100% participation in regular ed

- If "YES" is selected the next section remains disabled
- If "No" is selected the next section is required
 - Complete the statement with Regular and Special Ed percents as noted from the LRE section on the Federal 4 Summary (below the Services section)
 - Be sure to put the numbers in the correct fields – Regular Ed percent comes first on the form but second on the LRE table.
 - Complete the section explaining why 100% participation is not appropriate
 - Limited text field
 - If additional space is needed enter "See Additional Information page" and put the statement on the Additional Information page

Choose how student will participate in PE

Select the placement category at the bottom

- Check all that were considered by the team – must choose "At least 80%"
- Click the one that was "Selected"
- The "Selected" category at the bottom of the form must match the LRE on the LRE section of the Federal 4 Summary
- Click Yes or No for the K-12 section
 - If "No" is chosen, complete reason student is not at home school

Save

Annual IEP – Placement (EC)



PLACEMENT CONSIDERATIONS

Student: MAX POWER130443 Date of Birth: 11/07/2015 Meeting Date: 11/26/2019

7. REGULAR EDUCATION PARTICIPATION

Extent of Participation in Regular Education:

For Preschool: Will all of this student's special education and related services be provided with non-disabled peers in a regular education setting (designed primarily for students without disabilities)? Yes No

If no:

a. To what extent will the student not receive special education and related services in a regular education setting?

Special Education Minutes:

b. Describe the reasons why the IEP team determined that provision of services in the regular education setting was not appropriate for the student.

Participation in Regular Physical Education:

- When "No" is selected for services provided with non-disabled peers, the next section is required
 - Enter number of Special Ed minutes from LRE section of Federal 4 Summary
 - Enter reason regular ed setting is not appropriate
- Physical Education participation is printed on form
- Placement Continuum selection must match LRE on Federal 4 Summary

Placement Considerations for Early Childhood students

Three ECSE Placement forms are available on the Forms List Panel and Overview. Depending on the student's age, there may also be three K12 forms available. One of the forms is required. The others are optional and used if the placement changes during this IEP.

If the ECSE form is needed but does not appear, return to the Services Summary section and check "Yes" at the top (Does the student require an ECSE placement form?).

Answer question about extent of participation in regular ed

- If "YES" is selected the next section remains disabled
- If "No" is selected the next section is required
 - Enter the number of special ed minutes – you can find this number in the LRE section on the Federal 4 Summary screen (below the Services section)
 - Enter the reason the regular education setting is not appropriate for this student
 - Limited text field
 - If additional space is needed enter "See Additional Information page" and put the statement on the Additional Information page

The Participation in Regular Physical Education section is printed on the form


Select the appropriate placement category at the bottom. The category chosen at the bottom of the form must match the LRE Placement category selected on the LRE section of the Federal 4 Summary.

Save

Annual IEP – Prior Written Notice

PRIOR WRITTEN NOTICE

Personally Presented
 Mailed

Student: _____ Date of Birth: _____ Date of Notice: 

Prior Written Notice is given before our district takes certain actions. The following is to inform you of the action(s):

Proposed or Refused by our district

Change of Services Change in Placement

Other: _____

Description and explanation of the action: _____

- The Prior Written Notice in all IEP events is specifically for IEPs
- The options for proposed and refused actions are limited but "Other" is an option. Only one option can be chosen.
- The text boxes expand
- Five forms available inside IEP
 - Additional forms can be created in the Prior Written Notice Event

Prior Written Notice

Note: The PWN in all IEP/Amendment/Correction events is specifically for use in an IEP

- Proposed or Refused options are limited but "Other" can be used if needed
- Text boxes expand – no character limit

There are five PWNs available in the IEP

- If additional forms are needed, a Prior Written Notice event can be created on the student's Events page
 - Each Prior Written Notice event also has five PWNs
 - Multiple events can be created and can be open at the same time until the number needed is reached
 - Further instructions for creating additional PWNs are on the **User Created Events Quick Start Card**
- PWNs *do not* copy into an IEP Amendment. New forms are completed for changes made in the Amendment (the original is stored in the locked IEP)
- PWNs *do* copy into an IEP Correction.

Annual IEP – PWN Waiver



Waiver of 10 Days for Initiation of Action
(Waiver of 10 days allows for the immediate initiation of the action)

I understand prior written notice must be provided to parents a reasonable time (generally ten days) before the district's proposed action or refusal goes into effect. My signature below, or documentation of my verbal agreement, indicates I have had time to consider the proposed action before its implementation and agree that it may be implemented as soon as is practical.

Time requirement waived: I understand this provision and my signature below indicates that I am in agreement for the action to be carried out in less than 10 days.

Written Waiver Obtained Verbal Waiver Obtained

<input type="text"/>	<input type="text"/>	<input type="text"/>
Parent/Guardian Signature	Date	Time
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of Parent/Guardian Signature	Method	
<input type="text"/>	<input type="text"/>	
Date Received	Staff Signature	
	<input type="text"/>	
	Staff Title	

- If parent waives the 10-day waiting period
 - Click "Time requirement waived"
 - Select Written Waiver, Verbal Waiver or both
 - Complete required fields

Prior Written Notice – Waiver of 10 Day Period

Prior Written Notice must be provided to the parents for changes made to the IEP including type, amount or location of services, placement, goals, etc. (refer to chart provided during training and SSD Administrator for clarification). Legally, this notice must be provided at least ten days prior to the initiation of the action. However, the ten-day requirement may be waived by the parent/guardian/18+ year old student.

The waiver may be obtained in writing, verbally, or both. If the parent does not waive the 10 days, the begin dates in the IEP must reflect this.

If the parent does waive the 10 days, complete the waiver section at the bottom of the NOA.

- Choose "Time requirement waived"
 - Next section becomes required
 - Choose "Written", "Verbal", or both
 - Appropriate section/sections are required
 - Complete the required fields depending on which section(s) is chosen
 - SAVE

All Prior Written Notice forms are "optional" in Phoenix. If a form is started and saved, it can be reset by selecting "Set Status to Not Modified" at the bottom of the form or by following the steps to reset forms found on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Additional Information Page

ADDITIONAL INFORMATION

Title:

Student: MAX POWER130443 Date of Birth: 11/07/2015 Date of Meeting: 11/26/2019

- Blank page with unlimited character text box
- Can be used for overflow from other pages
- Sometimes used to include information required by DESE until Phoenix forms can be updated

Additional Information

The Additional Information page is a blank page that can be used for a variety of purposes.

- If you run out of room on another form the rest of the information can be entered here. This is rare because most textboxes have unlimited characters but there are a few that are limited, such as on the placement pages.
- Your SSD Administrator may direct you to add specific information on the Additional Information form.
- Sometimes a change is made by DESE that cannot be addressed in Phoenix immediately. In this case you may be directed by your SSD Administrator to add something to the Additional Information page until the update to Phoenix is released.

Enter a **Title** for the form

Enter the information in the text field. This is an unlimited character field.

The Additional Information form is "optional" in Phoenix. If a form is started and saved, it can be reset by selecting "Set Status to Not Modified" at the bottom of the form or by following the steps to reset forms found on the "Resetting Forms in Phoenix" handout and in Phoenix Help.

Validation Check

EVENT SECTION	FORM NAME	Validation Check
Excusal	Excusal	NOT MODIFIED
Front Page	Plan Dates	NOT MODIFIED
	Front Page - IEP	NOT MODIFIED
PLAAFP	PLAAFP	NOT MODIFIED
Special Considerations	Special Considerations	NOT MODIFIED
Federal 4	Assessments	NOT MODIFIED
	Classroom Accommodations	NOT MODIFIED
	Goals	NOT MODIFIED
	Services Screen	NOT MODIFIED

← Back to Events Reload Event Data Print Lock Event Validation Check

- Validation Check can be done anytime
- Should always be done before locking to catch errors
- Form Status is "Not Modified" until Validation Check is done
- Click **Validation Check**

Validation Check

A Validation Check can be done at anytime on a form, screen, or on the Event Overview.

- This checks each form and screen to be sure that all *technically required* fields have been completed. It does not check to be sure the *content of the IEP* is legally compliant.
- The check can be completed at any time but should be completed prior to locking. If an attempt is made to lock an event with errors, the system will display the errors even if a Validation Check was not performed.

To complete the Validation Check from the Event Overview

- Select **Overview** section at the top of the Forms List Panel
 - The "Form Status" at this point reflects the last time validation was checked or the event was opened. It will update when validation is checked again.
 - If you have completed some forms then closed and reopened the event, the status will be "NOT COMPLIANT" until the Validation Check is done.

Click the **Validation Check** button

If Event Fails Validation Check

Errors

Form : [Front Page - IEP](#)

Field : Date Parent/Legal Guardian
Error Message : required but not entered

Field : Mode Of Delivery
Error Message : required but not entered

Form : [PLAAFP](#)

Field : The strengths of the student
Error Message : required but not entered

Close

Form or Screen Name is a link.
Select the link to open the form
or screen.

- **Errors** window opens
- Use link to open form or screen and resolve errors
 - Contact Service Desk for assistance if needed
- Return to Event Overview and select Validation Check
- When validation check is successful, continue

Meeting is Not Compliant

If the meeting is not compliant, the Errors window displays

- When the Validation Check is completed on the Event Overview the Errors window displays all errors causing the meeting to be noncompliant
- Each entry shows where the error occurs
- The name of the form or screen is a link. Selecting the link opens the form or screen where the error is located.

If you need help understanding or correcting an error, contact the Service Desk. The text in the Errors window can be copied then pasted into a ticket or email to the Service Desk.

Sometimes additional errors will appear after you address the first set. This is a result of how compliance is checked.

Resetting Unneeded Forms

2. SPECIAL CONSIDERATIONS: FEDERAL AND STATE REQUIREMENTS

Student: Training Student 45 Date of Birth: 03/31/2003 Meeting Date: 08/02/2019

NOTE: For the first six items below, if the IEP team determines that the student needs a particular device or service (including an intervention, accommodation, or other program modification) information documenting the team's decision regarding the device or service must be included in the appropriate section of the IEP. These must be considered annually.

Is the student blind or visually impaired?

No Yes Completed

Does the student exhibit behaviors that impede his/her learning or that of others?

No Yes If yes, strategies including positive behavior interventions and supports must be considered by the IEP Team, and if determined necessary, addressed in this IEP. If a behavior intervention plan is developed, it becomes a part of the IEP.

Behavior Intervention Plan IEP Goals IEP Accommodations Considered, not needed

Before locking be sure to Reset any forms that were created but are no longer needed – in this example the BIP will be reset

1. Return to form where the unneeded form was created (Special Considerations)
2. Change response to make form disappear from Forms List Panel (uncheck Behavior Intervention Plan)
3. Save

Resetting Unneeded Forms

Some errors may be a result of an unfinished form that is no longer needed – could be a "Hidden" form or an "Optional" form.

These forms can be reset if they are not needed.

Forms that were partially or totally completed then saved can be reset so they will not be included in the locked IEP. It is not necessary to delete information before resetting.

Instructions can be found on the "**Resetting Forms in Phoenix**" handout and in Phoenix Help.

To reset a form

First you must reverse the steps that were taken to create it

In this example the BIP will be reset

1. Return to the form where the unneeded form was created (in this example Special Considerations)
2. Change the response that created the form (Uncheck the box in the behavior section)
 - Note: It is not necessary to remove the information from the form first
 - The form disappears from the Forms List Panel and Overview, but the process is not yet complete
 - If the process is not finished, the form will be included in the locked IEP
3. Save the form (Save Special Considerations)

Resetting Unneeded Forms, Cont'd

Annual IEP		
EVENT SECTION	FORM NAME	Validation Check 08/02/2019
Excusal	Excusal	NOT MODIFIED
Front Page		
	* Plan Dates	NOT COMPLIANT
	* Front Page - IEP	NOT COMPLIANT
	* Front Page - Additional Participants	NOT MODIFIED
PLAAFP		
	* PLAAFP	NOT MODIFIED
Special Considerations		
	* Special Considerations	COMPLIANT
Federal 4		
	Assessments	COMPLIANT
	Classroom Accommodations	COMPLIANT
	Goals	NOT MODIFIED
← Back to Events Reset Optional Forms Reload Event Data		Print Lock Event Validation Check

4. Return to the Overview

5. Select "Reset Optional Forms"

Reset Optional Forms

4. Return to the Overview to complete the process

The "Reset Optional Forms" button should be available at the bottom of the Overview. If it is not, return to the form where the unneeded form was created, reverse the choice that created the form and save.

5. Click **Reset Optional Forms**

Reset Optional Forms Window

Optional Form Name
BIP

6

7

Save Cancel

6. Click the box for the form(s) you wish to reset

7. Click Save

The form will not be included in the locked event

Reset Optional Forms Window

The Reset Optional Forms window opens

- Lists all forms available to be reset
- A form only appears on the list if it is an "Optional" form or a "Hidden" form removed by changing the response that created it
- If a form is not available to reset be sure the process that created it has been reversed (in this example, return to Special Considerations and uncheck the box for the BIP)

6. Check the box for each form to be reset

7. Save

NOTE: A form that has been reset can be used again if needed. Enter information on the form and Save. This will make the form active again.

NOTE: You may also contact the Service Desk for assistance with resetting unneeded forms.

Validation Check Successful

EVENT SECTION	FORM NAME	Validation Check 08/02/2019
Excusal	Excusal	NOT MODIFIED
PLAAFP	Plan Dates	COMPLIANT
	Front Page - IEP	COMPLIANT
	PLAAFP	COMPLIANT
Special Considerations	Special Considerations	COMPLIANT
Federal 4	Assessments	COMPLIANT
	Classroom Accommodations	COMPLIANT
	Goals	COMPLIANT
	Services Screen	COMPLIANT

- When all forms are compliant, the "Validation Successful" message displays briefly
- All completed forms are Phoenix "COMPLIANT"

Validation Check Successful

After correcting all errors and resetting all unneeded forms, return to the Overview and select **Validation Check**.

When the event is compliant a message displays briefly then disappears.

Status column shows

- Green "COMPLIANT" for all forms where the required fields are compliant (all technically required fields complete)
- Yellow "NOT COMPLIANT" (cannot lock event if any form/screen is not compliant)
- "NOT MODIFIED" for any form that has no information entered or optional forms that were reset

Print and Proofread

← Back to Events

🔄 Reload Event Data

🖨️ Print

🔒 Lock Event

✅ Validation Check

- When the validation check is successful, click **Print**
 - PDF will open – view on screen or print
- **PROOFREAD**
 - Double check dates – Initiation, Goal and Service Start/End
 - If student is eligible for ESY
 - Form B includes ESY services with correct dates for ESY program
 - At least one goal displays ESY statement
 - If student has classroom accommodations, Form F is included
 - Make any necessary corrections or changes
- Return to Event Overview

Print and Proofread Before Locking

Reminder: Events cannot be unlocked in Phoenix. To avoid the need for a correction event it is very important to proofread before locking.

When the meeting is compliant, select Print on the Overview screen

- **Printing can be done at anytime and from any form or screen. It is critical that it is done *before* locking.**

The PDF will open in a new window or tab depending on browser setting

Can view the PDF on the screen or click the printer icon on the Adobe tool bar to print it on paper

At this point most forms say "DRAFT" across them – exceptions:

- Excusal
- Transfer of Rights
- Prior Written Notice

Double check

- Initiation Date – shouldn't be more than 10 days in the future (except for some situations in ECSE or possibly an Initial IEP when awaiting parent consent to provide services)
- If student is ESY eligible, Form B shows ESY services and at least one Goal displays the ESY statement
- If student is eligible for MAP-A, Form D-Part 3 is complete, and objectives are entered for goals
- If student is, or will be 16 or older, Form C is complete, and goals are marked appropriately for Transition

Close the PDF window/tab

Lock Event

← Back to Events Reload Event Data Print **Lock Event** Validation Check

- Click Lock Event
- The Confirmation window appears
- The Initiation Date should be within 10 days of the Meeting Date for an Annual IEP
- If the date is not correct, or you are not ready to lock, click Cancel
- To correct the Initiation Date return to Plan Dates
- When Dates are correct, check the box and select OK
- The IEP locks

Confirmation

Initiation Date : 03/24/2022
IEP/SP End Date : 03/23/2023

I Accept the plan dates shown above.

After locking this meeting, you will no longer be able to make changes.

Ok Cancel

Lock the IEP

Click Lock Event

If the IEP is not Compliant, error messages will appear. Errors must be corrected before the IEP can be locked.

If the IEP is Compliant, the confirmation message appears.

The Initiation Date and End Date of the IEP appear on the Confirmation window. Double check the dates.

- If the dates are correct, click OK. The IEP will lock.
 - NOTE: For students in grades K – 12, the Initiation Date of an Annual IEP should be on, or no more than 10 days after, the IEP Meeting Date. Per DESE, no undue delay can occur in providing special education and related services to the child. If a delay is necessary, the reasons must be documented in the IEP.
- If the dates are not correct, or you are not ready to lock, click Cancel. If necessary, return to the Plan Dates screen and correct the dates.
 - If the End Dates must be corrected, be sure to check the Begin Dates also. Likely they will need to be updated as well.
 - If the dates are changed the LRE must be "accepted" on the Federal 4 Summary before locking.

One final reminder: Once an Event is locked in Phoenix, it cannot be unlocked. Errors in a locked IEP can only be corrected by creating and completing an IEP Correction event.

Locked Annual IEP

Scheduled Events				
Event Type	Primary Staff	Scheduled	Due	
Reevaluation Decision	END USER05	06/21/2020	06/21/2020	
Notification of Meeting - Annual IEP	TRAIN TRAIN12	07/31/2020	07/31/2020	
Annual IEP	TRAIN TRAIN12	07/31/2020	07/31/2020	

Locked Events					
Event Type	Plan Status	Completed Date	Completed By	Actual Date	Due Date
Notification of Meeting - Annual IEP		08/02/2019	TRAIN TRAIN12	08/02/2019	04/22/2020
Annual IEP	ACTIVE	08/02/2019	TRAIN TRAIN12	08/02/2019	04/22/2020
Notification of Meeting - Annual IEP		06/01/2019	END USER05	06/01/2019	10/14/2019
Annual IEP		06/03/2019	TRAIN TRAIN12	04/24/2019	10/14/2019

- Locked Annual IEP moves to Locked Events
 - **Plan Status** is "ACTIVE" or "PENDING ACTIVE" depending on Initiation Date
 - **Completed On** date is date the IEP was locked
 - **Completed By** is person who locked the IEP
 - **Actual Date** of Notification of Meeting is Date last NOM was "Stored"
 - **Actual Date** of Annual IEP is the Meeting Date
- Future Annual IEP appears on Scheduled Events due in 364 days from Meeting Date of new IEP

Locked IEP on the Events screen

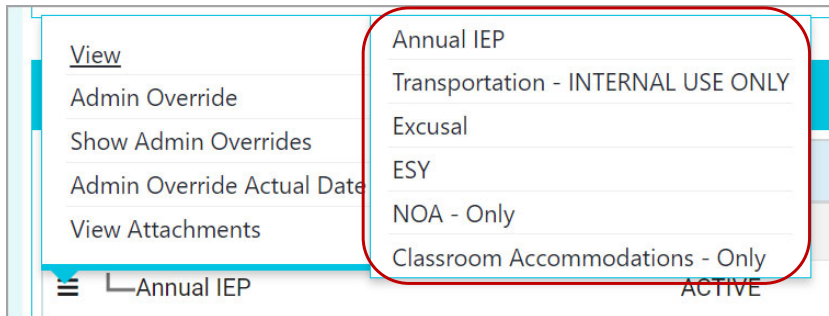
Locked Annual IEP is found on the Locked Events panel

- Status will be
 - ACTIVE if the Initiation Date is the day the event is locked or earlier
 - PENDING ACTIVE if the Initiation Date is in the future. PENDING ACTIVE plans become ACTIVE on the Initiation Date of the IEP.
 - PENDING if this is an Initial IEP and the Parent Consent event has not been locked, regardless of Initiation Date
- The "Completed On" date is the date the IEP was locked
- "Completed By" is the person who locked the IEP
- The "Actual Date" of the Notification of Meeting is the date "Create/Store Invite" was selected by the user for the last time, storing the final NOM
- The "Actual Date" of the Annual IEP is the IEP Meeting Date

Future Annual IEP is created and appears on Current and Upcoming Events panel

- Due 364 days from the Actual Date (Meeting Date) of the IEP that was just locked
- Event Primary Staff is the person who locked the IEP

View or Print Locked IEP



- To view or print the locked IEP on Locked Events panel
 - Click the hamburger icon
 - Hover over **View**
 - Select print layout from list

To view or print the locked IEP

Locate the event on the Locked Events panel

Click the Hamburger icon next to the event

Choose View from the list then choose the print layout

The print layout choices are:


- Annual IEP – opens the complete IEP
- Transportation – opens the Services Summary and Transportation forms for use by secretaries entering information into the transportation system
- Excusal – opens only the Excusal – can be printed separately if needed prior to the meeting (no DRAFT, can be printed before IEP is locked)
- ESY – prints forms needed for ESY programming
- PWN-Only – opens only the Prior Written Notices – allows the Prior Written Notices to print separately for parent signature (no DRAFT, can be printed before IEP is locked)
- Classroom Accommodations-Only – opens only Alternate Form F allowing it to be printed separately from the rest of the IEP

The PDF is created in a new window or tab, depending on browser settings

Use the PDF tool bar to print

Close the PDF window/tab.

Phoenix Support

1. Phoenix Help: Found within the site – click a Help Icon from the direct link, or from the Portal of SSD Life
2. SSD Help Center (Service Desk) 
 - a. SSD Help Center tile on the portal
 - b. SSD Help Center web site: <https://ssdmo.atlassian.net/servicedesk/customer/portal/4>
 - c. Email to technologyservices@ssdmo.org creates a ticket
 - d. Phone calls (314-989-8686) are entered into ticket system by the Service Desk Staff as they are received
3. SEIMS Facilitators
 - a. Tracy Turner
 - b. Mary Spires

Phoenix Support

A reminder of resources available for support with Phoenix

- The first place to go is Phoenix Help
 - Help Icon (the question mark) found on the Main Navigation Menu
 - Help icon on all event and form pages and screens
 - SSD Life > SSD Portal > Phoenix Help
 - Directly by using the web address: <https://ssdmo.atlassian.net/wiki/x/OoBmAw>
- The Service Desk is available from 7 AM until 4:30 PM
 - Create a ticket in the Service Desk portal through SSD Life > SSD Portal > SSD Service Desk or by using the Service Desk Portal web address: <https://ssdmo.atlassian.net/servicedesk/customer/portal/4>
 - Send request in an email which automatically creates a ticket
 - Call 314-989-8686 – voice mail creates ticket
 - Be sure to include your name plus the student's name and SSD Student Number along with a brief description of the issue
 - Include phone number and the best time to call if you would like a call back
 - You will receive an email with the ticket information. Please use the ticket to communicate with the Service Desk. Only create one ticket per issue.
- SEIMS Facilitators
 - Tracy Turner – 314-989-8586 – tturner@ssdmo.org
 - Mary Spires – 314-989-8558 – mspires@ssdmo.org