Phoenix Training
Navigating Phoenix
2022 – 2023

This is the first of two sections for Phoenix IEP Chair Training.

This section covers basic navigation, completing IEP Amendment and IEP Correction events, the reevaluation process as completed in Phoenix, progress reports, changing providers, teacher reports, student reports, and Phoenix supports.

The second section covers completion of the IEP including all forms and screens. It can be downloaded from Phoenix Help>Phoenix Training Information>New IEP Chair Training Information>Power Point Presentations

Basic Navigation

Technical Requirements for Phoenix

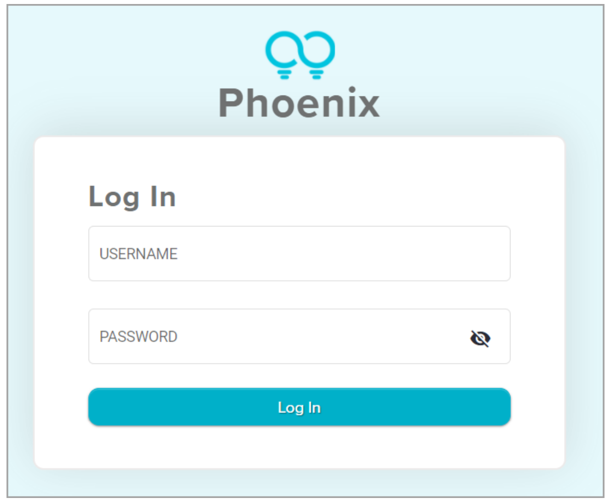
- Works on most browsers (Google Chrome, Firefox, Safari, Edge)
- iOS and Android compatible
- Adobe Reader is required for printing

Technical requirements

- Works on most browsers – we recommend Google Chrome
- iOS and Android compatible
- Must have Adobe Reader installed to generate the printed forms (PDFs)

Logging In

- Open phoenix.ssdmo.org
  - Add the site to your Bookmarks/Favorites and Bookmarks bar
- Use your SSD Username and Password
- Login



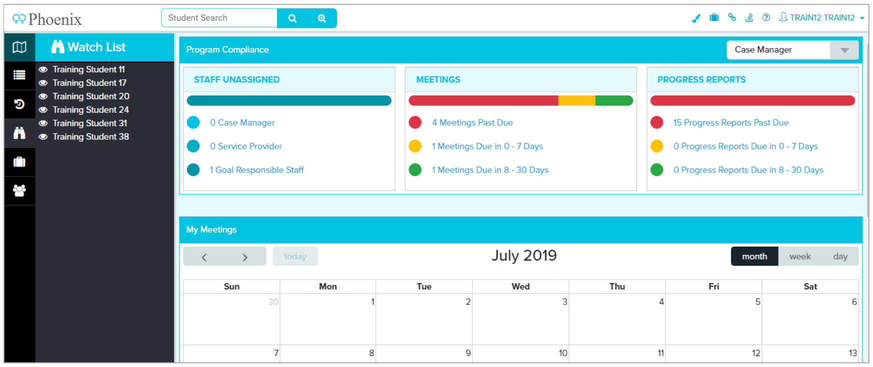
Logging In

Log into Phoenix using the following web address: https://phoenix.ssdmo.org

We recommend using Chrome as your default browser and saving Phoenix to your favorites. It is also available through the SSD portal, but we encourage using the direct link, and saving it in your Bookmarks/Favorites.

Use your SSD Username and password to log into Phoenix. Use your simple username not including ssdco or @ssdmo.org

Dashboard



- First page seen when logging in
- Program Compliance displays information to assist with provider assignments, meetings, and progress reports
- Student List Panel opens to the Watch List

The Dashboard

The Basic Navigation Quick Start Card includes this information.

- The Dashboard is the Home Page of Phoenix – viewed when you log in
- It is designed to assist staff in maintaining compliance in the areas of providers, meetings, and progress reports
- It includes information about unassigned providers, meetings due in the next 30 days or overdue, and Progress Reports due in the next 30 days or overdue
- The Student List Panel opens to the Watch List

The My Meetings calendar

- Displays meetings/events scheduled in the next 30 days when you are the Primary Staff or included as Invited Staff on the event/meeting

Header Navigation

- The Header is always visible
- Phoenix logo is a link back to the Dashboard
- Student Search
  - Simple Search
  - Advanced Search
- Main Navigation Menu icons

Header Navigation

- The Header is always visible as you move around the program
- The Phoenix logo is a link to return you to the Dashboard
- The Student Search is used for a simple search or to open the Advanced Search window
- The Main Navigation Menu includes icons for multiple program features

Main Navigation Menu Icons

TRAIN12 TRAIN12

Icon	Icon Name	Description
	Theme Picker	User can choose a preset theme color or customize by choosing from the color picker by selecting the paint brush icon
	Caseload Management	Teachers and related service providers can view students on their Caseload and Watch List
	Staff Management	Assignments for Case Manager, Event Primary Staff, Service Providers, and Goal Responsible Staff can be reassigned and unassigned for selected staff member.
	Reports	Access to Power BI to view Phoenix Reports.
	Help	Phoenix Help Home Page
TRAIN12 TRAIN12	**User Profile**	User details and logout

Main Navigation Menu Icons

- **Theme Picker**
  - Allows the user to choose a "theme" for the program by selecting a color from the color picker that displays when the paint brush icon is selected. The user can select any color or keep the default color.

- **Caseload Management**
  - Includes students on the user’s Phoenix Caseload (students you Case Manage, are assigned as Primary Staff for an event, are a Service Provider or Goal Responsible Staff)
  - Selecting the folder by a student’s name displays the student’s goals and services assigned to the user (not all goals and services), and all of the student’s Scheduled Events.

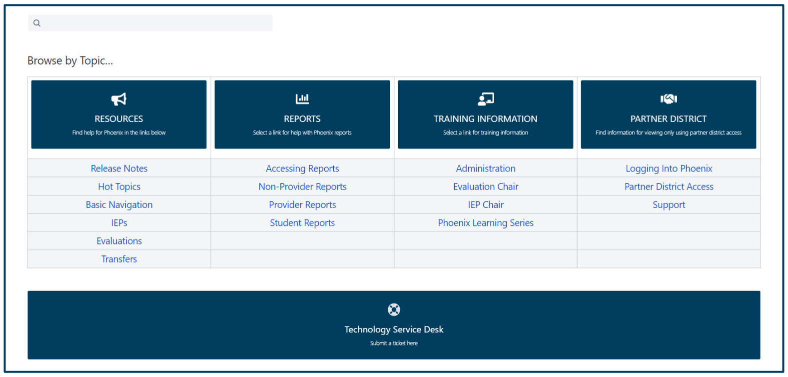
- **Staff Management**
  - Assignments for Case Manager, Event Primary Staff, Service Providers, and Goal Responsible Staff can be viewed for a selected provider
  - Items for multiple students can be unassigned, or reassigned to the same provider, at the same time

- **Reports**
  - Access to Power Bi to view Phoenix Reports

- **Help**
  - Opens the home page of the Phoenix Help site

- **User Profile**
  - User details and Logout

Phoenix Help Home Page



- Can be viewed
  - Using the Help icon on the Phoenix Main Navigation Menu
  - Web address: https://ssdmo.atlassian.net/wiki/x/OoBmAw
  - From the SSD Portal

Phoenix Help Site

Phoenix Help can be accessed:

- Using the Help icon (question mark) on the Main Navigation Menu bar in Phoenix (opens the Home Page)
- Using the Help icon on any Event or Form/Screen page (opens the help page for the specific event or form)
- From the web address – can be stored in Bookmarks/Favorites
- From the SSD Portal

The Home Page opens when Phoenix Help is opened from the Dashboard icon, the web address, or the Portal tile

- The site is updated as the need arises during the school year

Links on the Home Page go to:

- **Resources**: links to important information about Phoenix such as Release Notes and Hot Topics, Also links to page where you can download the latest versions of quick start cards, help documents, etc.

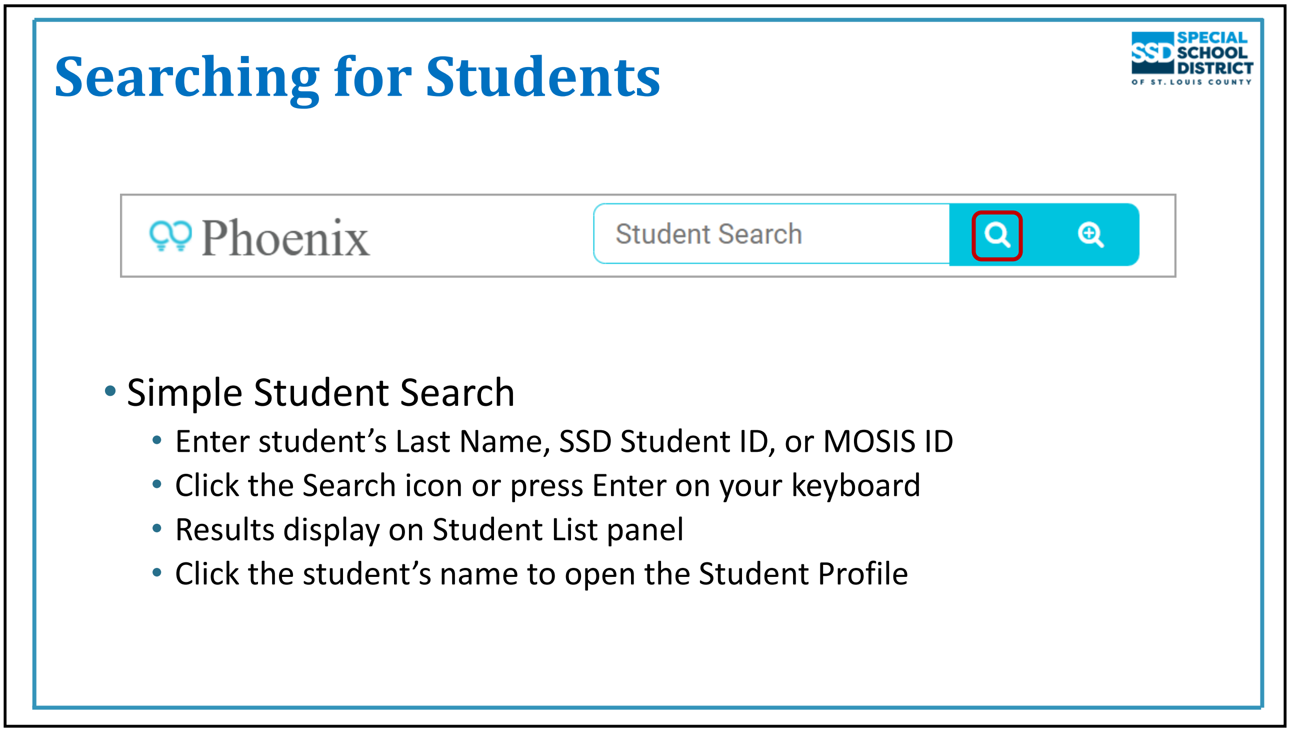
- **Reports**: Information about accessing Phoenix reports and the different types of reports available

- **Training Information**: Information about Phoenix training

- **Partner District**: Information for Partner District Staff with view only access to Phoenix

- **Technology Service Desk**: Opens the page in the SSD Help Center where a ticket requesting assistance can be created

Finding Your Students



Searching for a student not included on any of your Student Lists

The Phoenix Basic Navigation Quick Start Card includes this information.

Simple Search:

- Enter the student's SSD ID number, last name, or MOSIS ID number
  - The best options are SSD ID or MOSIS ID numbers which will return one result
- Click the Search icon or press Enter on your keyboard

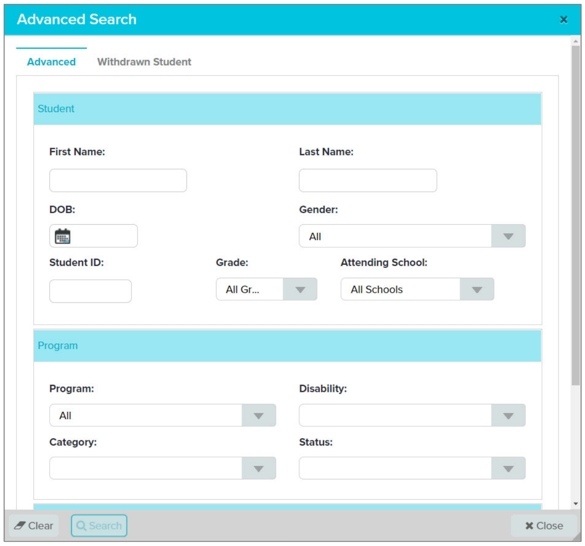
A list of students meeting the criteria entered appears on the Student List panel – you will only see students in the districts you have access to. If SSD ID or MOSIS ID number was used, one student will appear.

Click the name of the student to open the record

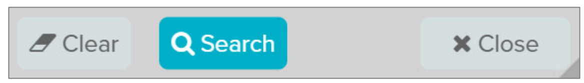
Reminder: You only have access to students in the district(s) in which you work

To search by other criteria (First and Last Name, DOB, School and Grade, etc.) select the Advanced Search icon (magnifying glass with +) which opens the Advanced Search window

Advanced Student Search



- Students can be searched using
  - First Name and Last Name
  - SSD or MOSIS ID
  - Grade and Attending School
- When 2 characters or criteria have been entered, the Search button will activate.
- Click Search

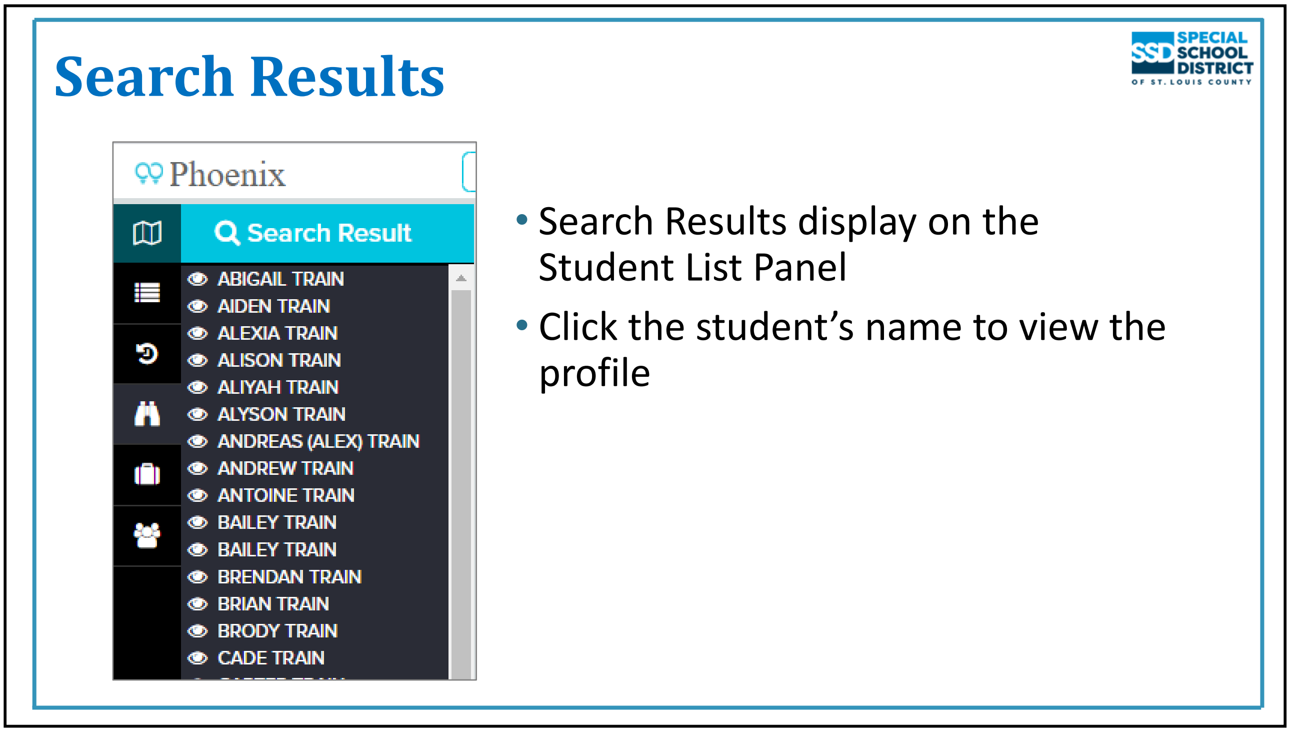


Advanced Search

Advanced Search is useful when you don't know a student's ID number and the name is common. It is primarily used by administrators and support staff.

In order to use Advanced Search at least two characters must be entered before the Search button is activated.

A search cannot be done with only the Date of Birth. Other information such as first or last name, or gender, must also be entered.



Search Results

Search results appear on the Student List Panel. The more specific the search criteria, the smaller the list.

Reminder: You only have access to students in the district(s) in which you work.

Click the student's name to open the profile.

Student List Panel

SPECIAL SCHOOL DISTRICT OF ST. LOUIS COUNTY

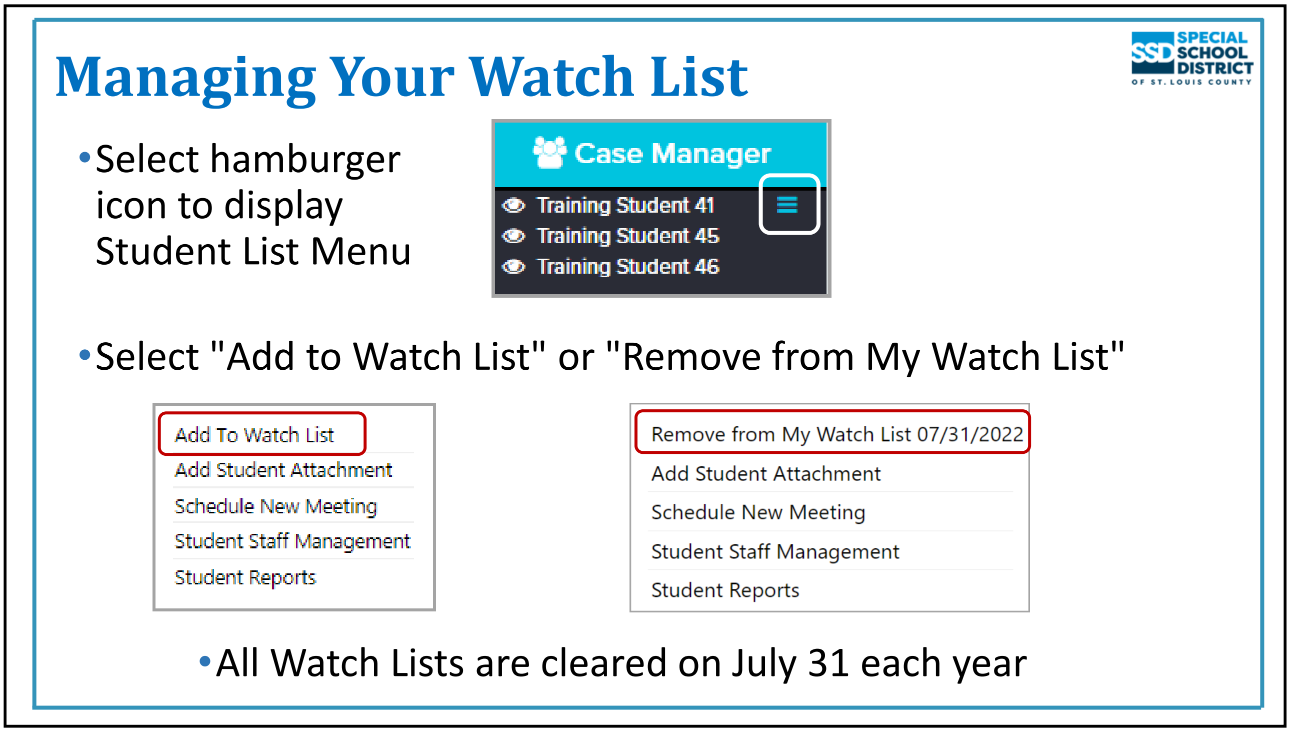
Icon	Icon Name	Description / Students Included	Created by
	Collapse/Expand	Collapses or expands the panel	
	Classlist	Not used by SSD	
	Last 10 Students	The last ten students whose profile was accessed	System
	Watch List (default)	Students the user, or another user, has added to the list	User
	Caseload	Students assigned to user as Case Manager, Event Primary Staff, Service Provider, or Goal Responsible Staff	System
	Case Manager	Students for whom the user is assigned in Phoenix as Case Manager	System

The Student List Panel Icons

- Control the list of students on the Student List Panel
- Initially opens to My Watch List which for most users will be blank when logging in the first time

Options available

- **Collapse/Expand**: Closes and opens the panel. Closing the panel allows you to see more of the student profile, event, etc. on the right
- **Classlist**: This option is not used by SSD
- **Last 10 Students**: Displays the last 10 students whose profile was opened
- **Watch List**: Students added by you or someone else. Students can be added or removed at any time. Watch Lists are automatically cleared every July 31. Students added could be the students you case manage or just need quick access to their record.
- **Caseload**: The term "Caseload" is used differently in Phoenix than it is in SSD. In Phoenix it refers to ALL students the user is associated with in the system as Case Manager, Event Primary Staff, Service Provider, or Goal Responsible Staff. In SSD, it generally refers only to those students for whom you are the Case Manager.
- **Case Manager**: Students you are assigned to as Case Manager *in Phoenix*



Managing Your Watch List

The Watch List is the only list that is user created and maintained. Students can be added to your Watch List by you or by someone else (your Administrator, Intake, Student Data, etc.)

You may want to add a student to your Watch List if you are the student's Case Manager or if you need frequent access to the student's record (perhaps you are a service provider for the student). When a student is on your Watch List a single click on the name will open the student profile.

To add a student to your Watch List
1. Search for the student (or choose the Case Manager icon to display your students)
2. Hover over the student's name on the Student List Panel to see the hamburger icon
3. Select the hamburger icon to display the Student Management Menu
4. On the menu, choose "Add To Watch List"

To remove a student from your Watch List
1. Hover over the student's name on your Watch List to see the hamburger icon
2. Select the hamburger icon to display the Student Management Menu
3. On the menu, choose "Remove from My Watch List"

Reminder: All Watch Lists are cleared every year on July 31.

Student Profile

Section	Description
Summary	Includes Student Alerts, Snapshot, and Hot Tasks Case Manager can be updated on the Snapshot
Details	Demographics and School Enrollments
Program Summary > Special Ed	Information from the Active Plan (IEP) including Goals, Services, LRE, Assessments, Classroom Accommodations and Progress Reports Case Manager can be updated on Program Summary>Special Ed
Program Summary > Plan History	A listing of all previous plans. Selecting a plan displays the information from that plan including completed Progress Reports
Program Summary > Disabilities History	All previous and current disabilities for which the student qualifies or qualified
Program Summary > Case Manager History	All Case Managers assigned to the student over time. Each entry includes an End Date except the current Case Manager
Events	All Scheduled (open) and Locked Events
Logs	Student Attachments
Student Audits	The Student Audit Log
Watch List	List of all staff for whom the student is on the Watch List

Student Profile

The student profile is made up of seven links. One link, Program Summary, has four sections.

To view a section, click the appropriate link.

IEP Amendment
and
IEP Correction
Events

Amendment vs Correction

SPECIAL SCHOOL DISTRICT OF ST. LOUIS COUNTY

Amendment	Correction
• Changes IEP Team decision	• Corrects an error in locked IEP
• Requires agreement of parent, partner district rep, and SSD rep	• No agreement required – agreement made at the IEP
• Excusal, Front Page, Amendment form, and PWNs do not copy	• All forms copy from the IEP
• Amendment form required	• Correction form available if needed
• Can be done following an IEP, Amendment, or Correction	• Only done following an IEP, or another Correction – not used to correct an Amendment

IEP Amendment vs IEP Correction

The IEP Amendment and IEP Correction events are used for different purposes.

- Amendment: used to change a decision agreed to by the IEP team during a previous IEP event (IEP or IEP Amendment), usually completed after some time has passed
    - Example: Moving a service from Special Ed setting to Regular Ed
- Correction: Corrects a "clerical" error in a locked IEP or an incorrect Initiation Date. It is completed when the error is noticed, usually soon after locking the event.
    - Example: A service or goal was agreed to at the IEP but was not added before the IEP was locked

Agreement:

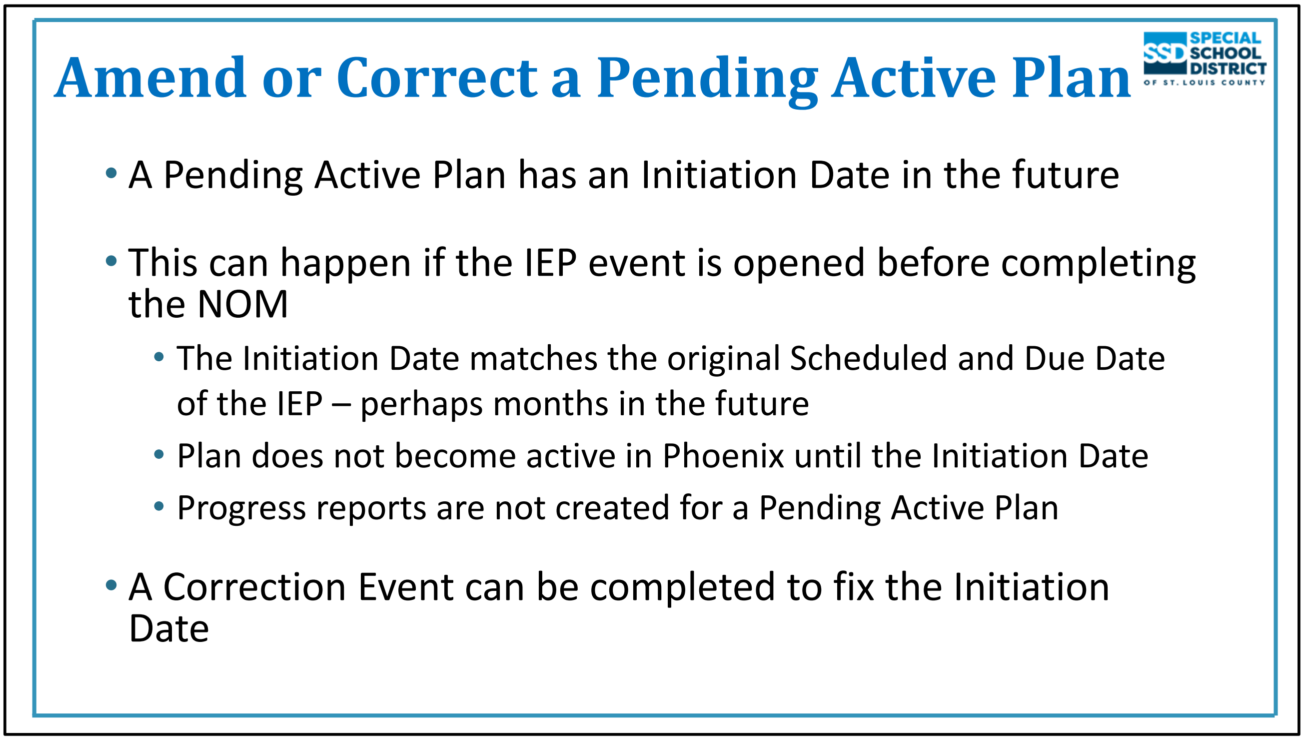
- Amendment: Must be agreed to by the “Big 3”: Parent/Guardian/Student Age 18+, Representative of the Component (Partner) District, Representative of SSD (usually the Case Manager)
- Correction: No agreement needed. The agreement was made at the original IEP.

Forms:

- Amendment: All forms copy except the Excusal, Front Page, and PWNs. The Amendment form is required.
- Correction: All forms in the IEP copy. A Correction form is available, required if the parent has received a copy of the incorrect IEP.

What events can be amended or corrected?

- Amendment: Can be completed following an IEP, IEP Amendment, or IEP Correction
- Correction: Can only be completed following an IEP. If a mistake is made in an IEP Amendment, a new IEP Amendment event should be created to correct the error. No Amendment form in the Correction.



Amend or Correct a Pending Active Plan

A Pending Active Plan has an Initiation Date in the future. This is not an issue if the date is within a few days (and not more than 10 days past the Meeting Date) but is if the date is farther into the future.

A date too far in the future can happen if the IEP is opened before completing the Notification of Meeting. When this happens, the original Scheduled Date (matches the Due Date of the IEP) is used to calculate the Initiation Date on the Plan Date page.

The plan doesn't become active until the Initiation Date. This is a problem particularly when the Initiation Date is far in the future. Progress Reports are not created for a Pending Active Plan. Reports will continue to be created for the Active Plan until it expires and the goals are no longer active.

When a new Notification of Meeting is completed, the Meeting Date and Projected Annual Due Date are automatically updated on the Plan Dates. *The user must update the other start and end dates.*

A Correction Event can be completed to correct the Initiation Date. Remember, per DESE, the Initiation Date of an Annual IEP should not be more than 10 days later than the Meeting Date.

Amendment/Correction Procedure

- IEP Amendment or IEP Correction event is user created (usually by the student's Case Manager)
- Forms completed in the selected IEP event (IEP, Amendment, or Correction) copy into the new IEP Amendment or IEP Correction event except
  - Amendment form, Correction Notification form, and Prior Written Notices are always blank in the new event
- IEP Chair makes the changes, saves, and locks
- The new Amendment or Correction becomes the Active Plan
- Entire document is printed and sent to parents

Amendment/Correction Procedure

The IEP Amendment or IEP Correction event is user created.

The IEP information is copied from the event selected when creating the Amendment or Correction. This does not include the Amendment form, Correction Notification form, and Prior Written Notices which must be completed for each event. It also does not include the Excusal or Front Page if the previous event was an IEP.

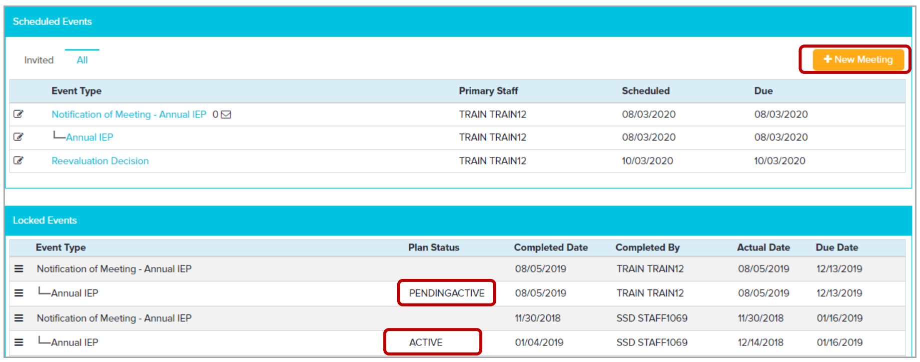
The IEP Chair changes the information as agreed, locks the event, then prints the entire document and sends it to the parent. It replaces the IEP, or previous IEP Amendment or IEP Correction they were given earlier.

The Amendment or Correction event becomes the Active Plan if the Initiation Date is in the past.

Create the IEP Amendment or IEP Correction Event

SPECIAL SCHOOL DISTRICT OF ST. LOUIS COUNTY

- Can Amend or Correct both Active and Pending Active Plans
- Click **+New Meeting**



Scheduled Events

Invited All + New Meeting

	Event Type	Primary Staff	Scheduled	Due
	Notification of Meeting - Annual IEP 0	TRAIN TRAIN12	08/03/2020	08/03/2020
	└Annual IEP	TRAIN TRAIN12	08/03/2020	08/03/2020
	Reevaluation Decision	TRAIN TRAIN12	10/03/2020	10/03/2020

Locked Events

	Event Type	Plan Status	Completed Date	Completed By	Actual Date	Due Date
≡	Notification of Meeting - Annual IEP		08/05/2019	TRAIN TRAIN12	08/05/2019	12/13/2019
≡	└Annual IEP	PENDINGACTIVE	08/05/2019	TRAIN TRAIN12	08/05/2019	12/13/2019
≡	Notification of Meeting - Annual IEP		11/30/2018	SSD STAFF1069	11/30/2018	01/16/2019
≡	└Annual IEP	ACTIVE	01/04/2019	SSD STAFF1069	12/14/2018	01/16/2019

Creating the IEP Amendment or IEP Correction Event

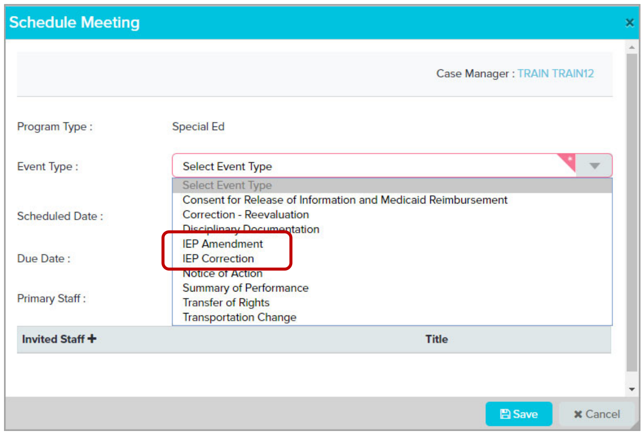
This information is available on the **Amendment/Correction Quick Start Card**.

The same steps are used to create both the IEP Amendment and IEP Correction events.

To create the IEP Amendment or IEP Correction Event
- Open the student's profile
- Open the **Events** Screen
- Click **+ New Meeting**

IEP Amendment and IEP Correction Events

- Select Event Type – **IEP Amendment** or **IEP Correction**



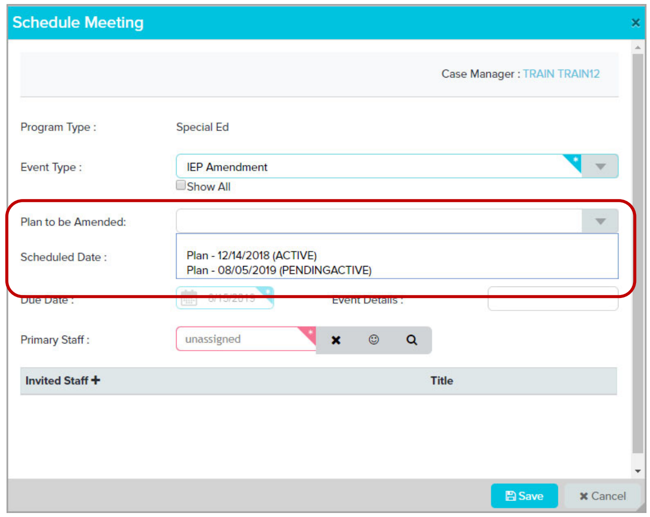
Choose the Event Type

Click **Event Type** and select **IEP Amendment** or **IEP Correction**

This example will create the IEP Amendment

Select Plan to Amend or Correct

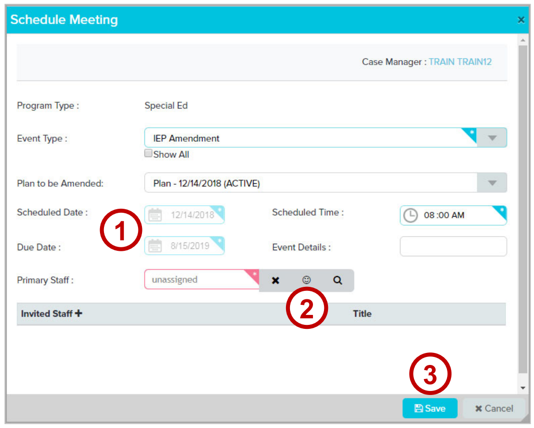
- Select Plan to be changed from menu
- If there is no Pending Active Plan there will only be one option – the Active Plan



Select the Plan to Amend

Select the Plan you wish to Amend or Correct. Most often there will only be one option – the Active Plan. If the student has a Pending Active Plan, there will be 2 choices.

IEP Amendment Event – Details



1. Dates autofill and are not editable
2. Select the smile icon to assign to yourself
3. **Save**

Entering the Details

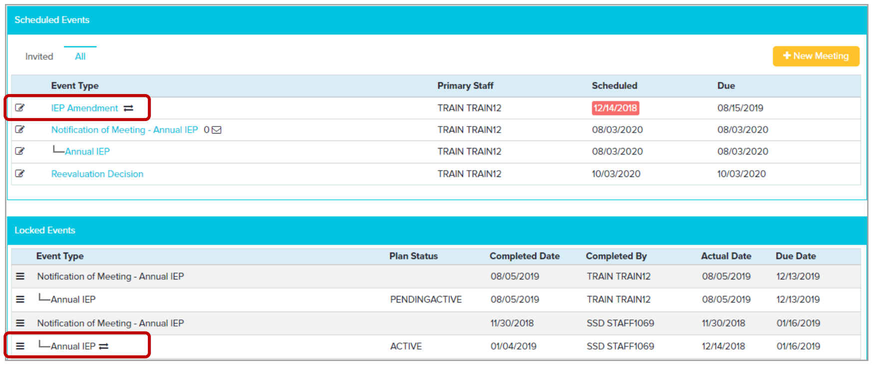
1. The Dates autofill and cannot be changed.
   a. Scheduled Date = The Meeting Date of the IEP being amended or corrected even if other Amendments or Corrections have been completed
   b. Due Date = 10 days from the date the event is being created

2. Click the **Smile** icon to assign the event to yourself.

3. **Save**

The Event Details field can be used to specify information about the event such as the reason for the Amendment or Correction but is not required. Text entered in this field becomes part of the event title when the event is locked.

Event Appears on Scheduled Events



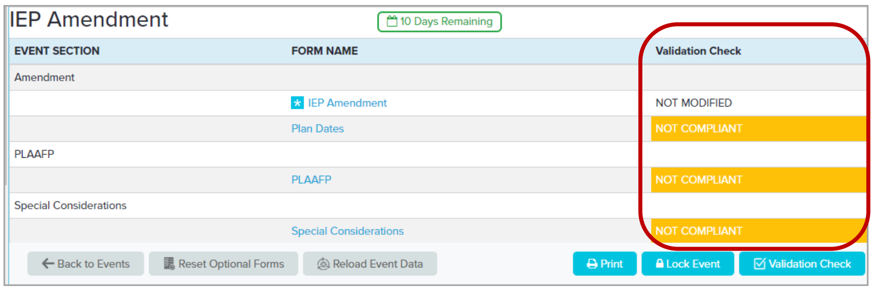
- The event appears on Scheduled Events
- Icon shows connection to event being amended
- Click the event name to open it

Event Appears on Scheduled Events

- The event appears on the Scheduled Events panel.
- The Scheduled Date is red because it is in the past (the Meeting Date of the IEP). This is correct.
- If information was entered in the Event Details field it appears as part of the event title.
- The double arrow icon indicates which event is being amended. (For a correction event, the icon is a check mark).
- Click the name of the event on Scheduled Events to open it.

IEP Amendment Event Overview

- Forms/Screens completed in last IEP event completed are copied but show "NOT COMPLIANT" until Validation Check is done
- IEP Amendment form is "NOT MODIFIED"
  - IEP Amendment form does not copy from one Amendment to another – it is always blank in a new event



Event Overview

- After opening the event, the Overview displays.
- An indicator appears at the top showing how many days remaining before the Due Date (in green) or days past the Due Date (in red). This appears on all events when within 10 days of the Due Date, then turns red if the current date is past the due date.
- All forms/screens completed in the original IEP or latest Amendment have status of "NOT COMPLIANT" until a Validation Check is done.
- The IEP Amendment form is "NOT MODIFIED" because it"s blank – it does not copy from previous events.

Amendment Section

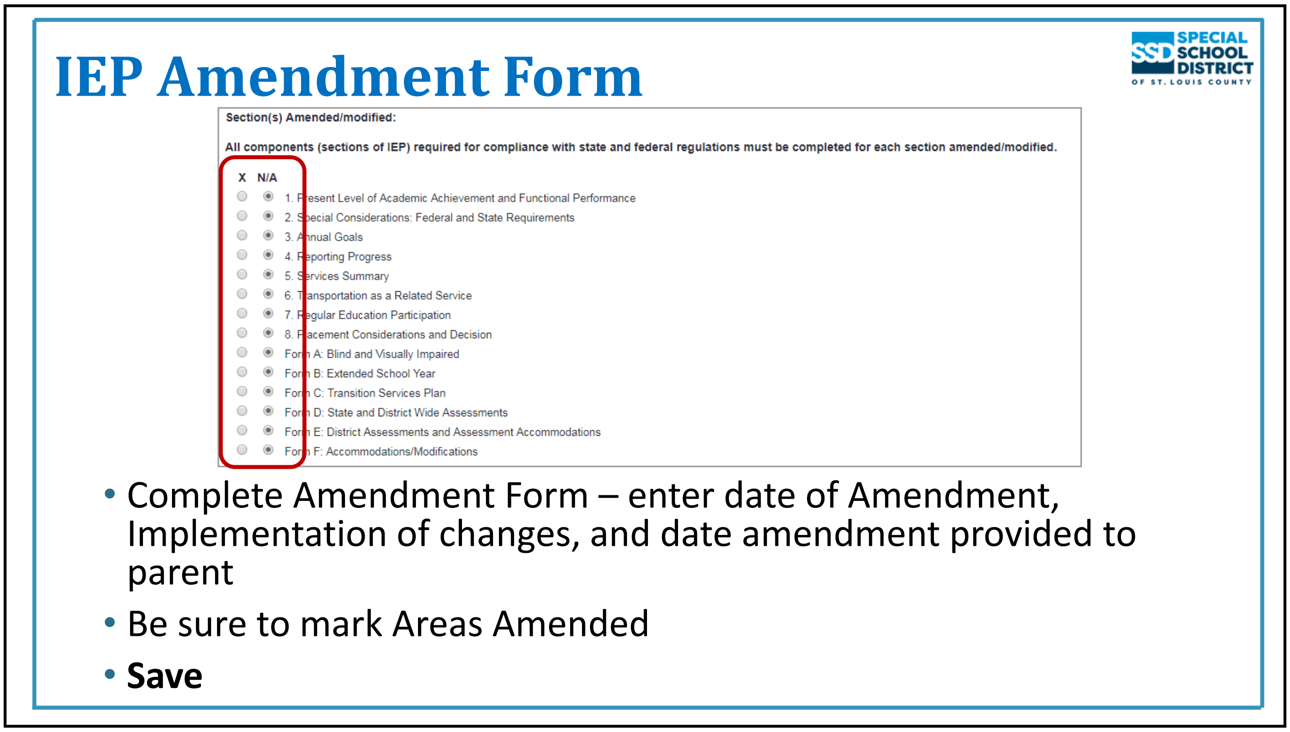
EVENT SECTION	FORM NAME	Validation Check
Amendment		
	IEP Amendment	NOT MODIFIED
	Plan Dates	NOT COMPLIANT

- Includes
  - IEP Amendment form
  - Plan Dates form
    - The dates copy from the original IEP being amended even if other Amendments or Corrections have been completed
    - The dates should not be changed in an Amendment

Amendment Section

Includes

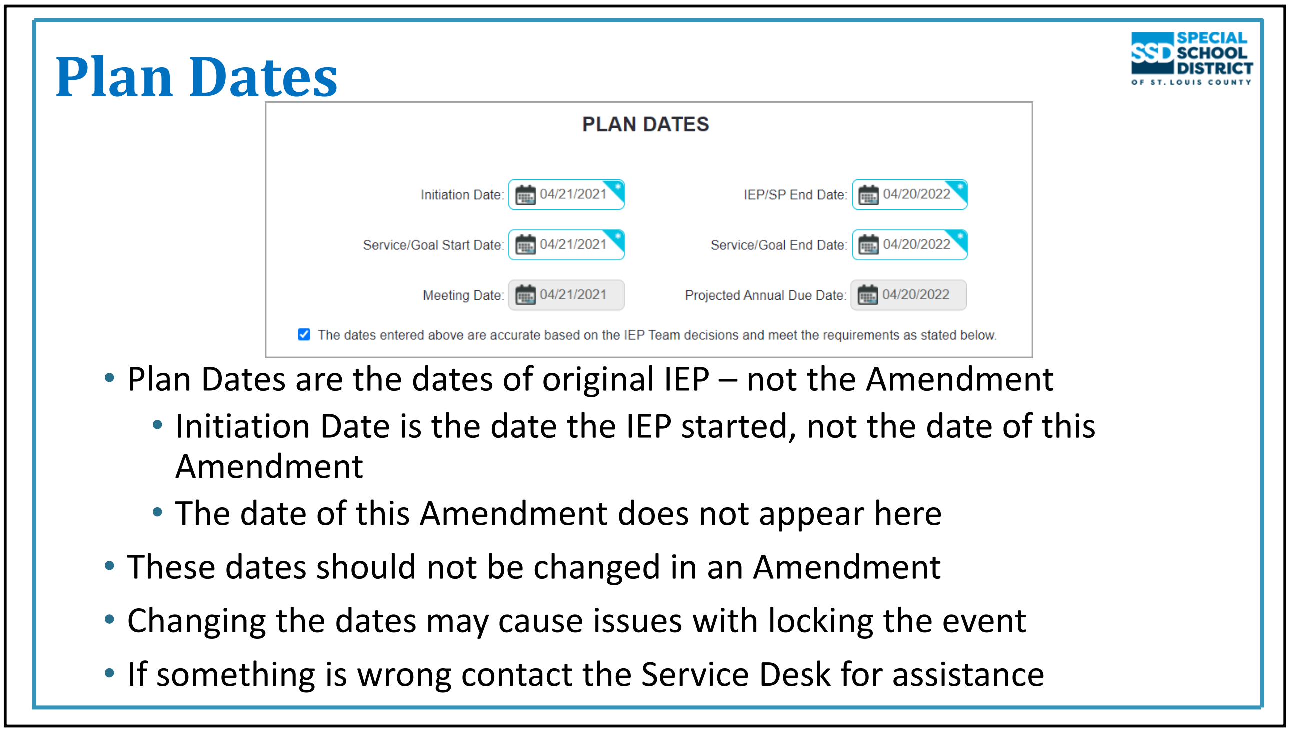
- IEP Amendment Form
  - Required form used to document agreement, dates, and sections amended
- Plan Dates
  - The dates copy from the IEP being amended even if other Amendments or Corrections have been completed
  - *The Plan Dates should not be edited in an Amendment*



IEP Amendment Form

Open the Amendment Form

- Top of the form is information about the Amendment
  - Enter Date of the Amendment
  - Enter Date of Implementation of Amendments
  - Enter Date IEP Amendment documentation provided to parent (the date the Amendment is sent to the parent)
- Select who agreed to the amendment and enter the names
- Select how the agreement was made
- Choose the sections being amended
  - Options default to N/A so the user must choose the sections
  - Be sure to choose all sections being changed. Sometimes amending one section will affect another which will also need to be changed.
    - For example, adding or removing services in the special education setting will also affect Regular Education Participation and Placement Considerations and Decision
- The last section is only used if a meeting was held to complete the amendment. This is rare.
- **Save**



Plan dates

- *These dates must match the dates of the original IEP being amended even if other Amendments/Corrections have been completed. They copy from the IEP and should not be changed when completing an Amendment.*

- The Amendment Date should not appear on this screen

- The dates should not be changed when completing an Amendment

- The Initiation and Service/Goal Start Dates match the Initiation Date of the original IEP – not the Amendment – and should not be changed to the Amendment date
    - Changing the Plan Dates changes the dates on all Classroom Accommodations, Goals, and Services which would not be accurate.

- The confirmation box will already be checked

- If there are issues with the Plan Dates contact the Service Desk for assistance.

Amendment – Revising Goals

- Do not delete existing goals when completing an Amendment
- To show a goal will no longer be addressed as written, change the End Date to the last day the goal was addressed
- Never change the text of a goal in an Amendment.
  - Changing the goal text will change it in all progress reports – both completed and future
- If a goal will no longer be implemented as written, change the End Date and add a new one with the new information and new Begin Date

Revising Goals in an Amendment

This information is included on the **Amendment/Correction Quick Start Card**

Existing goals should not be edited or deleted in an Amendment. End Dates should be used to indicate the goal will no longer be implemented. If a goal will no longer be addressed as written (the student has met the goal or the team has determined the student will not achieve it as written), change the End Date to the last day the goal was or will be implemented as written and, if needed, write a new goal with a new Begin Date.

If a goal is deleted, any completed progress reports are moved to Plan History and deleted on Program Summary>Special Ed. The completed reports will not be included in reports printed after the Amendment is locked, they must be printed from Plan History.

If a new goal is added in an Amendment in error, it can be deleted before the Amendment is locked.

Never change the text of a goal in an Amendment. Changing the goal text for the goal will also change it in all progress reports for the goal, both completed and future. If the goal is being modified, change the End Date of the original goal to the last day it will be implemented as written, then add a new, revised goal with a new Begin Date.

Amendment – Revising Services

- Do not delete existing services when completing an Amendment
- If a service will no longer be provided as written, change the End Date to the last day the service is/will be provided
- No other details should be changed in an existing service (Dates, Duration, Setting, etc.)
- If needed, add a new service with the revised details and new Begin Date

Revising Services in an Amendment

This information is included on the **Amendment/Correction Quick Start Card**

Existing services should not be edited or deleted in an Amendment. End Dates should be used to show a service will no longer be provided.

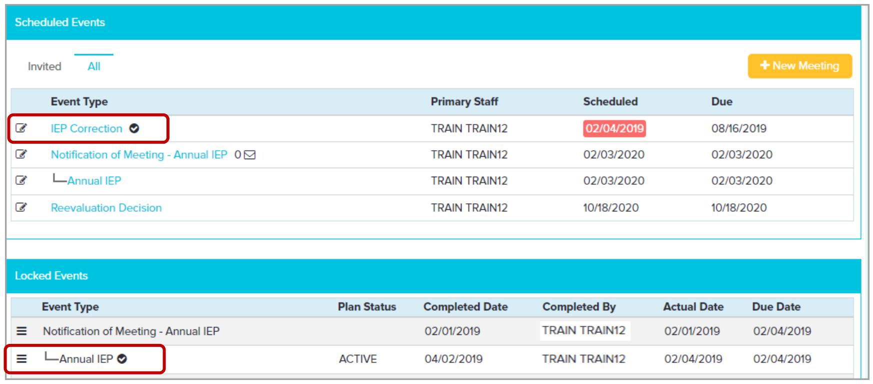
The only detail of an existing service that should be changed in an Amendment is the End Date if the service will no longer be provided. Do not change any other details (Start Dates, duration, setting, Servicing School, etc.).

If a new service is being added to replace an old one, change the End Date of the old service to the last day the service is or will be provided. Then add the new service with the new information and new Begin Date. This maintains the history and integrity of the IEP.

The LRE must be "accepted" in ALL amendments and corrections even if the services are not changed.

- If a manual override was done in the IEP or previous Amendment, it must be redone in the new Amendment.
  - Open the Federal 4 Summary
  - Scroll or Fly to the Services section
  - Select the Manual Override checkbox
  - Complete the Manual Override
  - The information saves automatically

IEP Correction Event

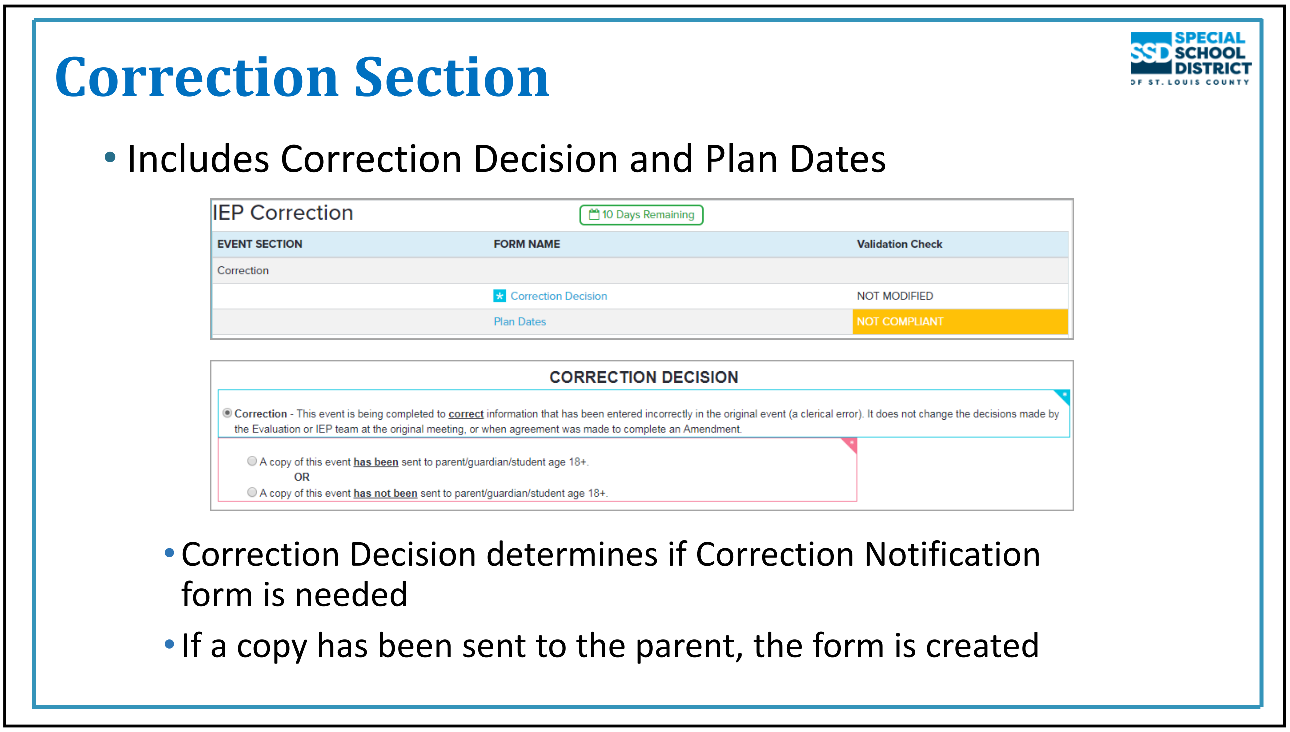


- IEP Correction event appears on Scheduled Events
- Checkmark icon shows connection to event being corrected

IEP Correction Event

When an IEP Correction event is created it appears on Scheduled Events. A checkmark icon shows the connection between the new Correction event and the event being corrected.

Click the name of the event to open it.



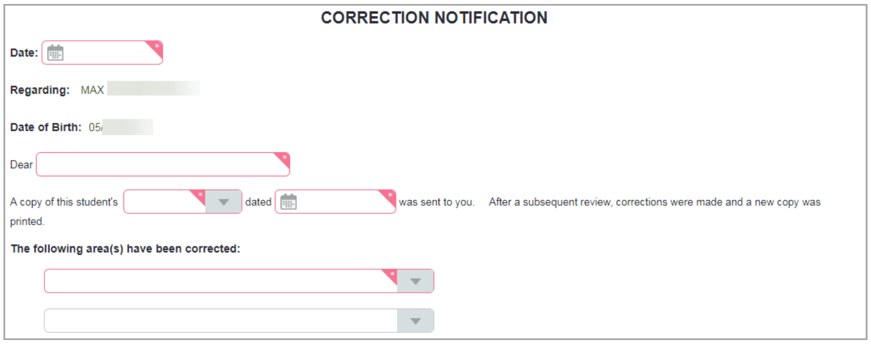
Correction Section

The Correction section includes

- Correction Decision form
  - Used to determine if the Correction Notification form is needed
  - If the parent has received a copy of the event being corrected, the required Correction Notification is created on the Forms List Panel

- Plan Dates form
  - The Plan Dates copy from the IEP
  - The Initiation Date and Service/Goal Start Date can be revised if needed.
    - If the Initiation Date is changed, the Service/Goal Start Date must also be changed as the two dates must match.

Correction Notification Form


CORRECTION NOTIFICATION

Date:

Regarding: MAX

Date of Birth: 05

Dear

A copy of this student's dated was sent to you. After a subsequent review, corrections were made and a new copy was printed.

The following area(s) have been corrected:

- Informs parent the event has been corrected
- Includes the areas that have been corrected
- Instructs them to destroy the previous copy

Correction Notification Form

If the parent has received a copy of the event being corrected, the Correction Notification form is created.

It is used to

- Inform the parent the event has been corrected
- Inform the parent of the areas that have been corrected
- Remind them to destroy the original, incorrect copy

Plan Dates

- Plan Dates are the dates of original IEP – not the Correction
  - Initiation Date is the date the IEP started – or should start
  - The date of the Correction does not appear here
- These dates should only be changed in a Correction if the Initiation Date and Service/Goal Start Date are too far in the future (more than 10 days past the Meeting Date for an Annual IEP)
- Changing the dates may cause issues with locking the event
- If something is wrong contact the Service Desk for assistance

Plan dates

- *These dates match the dates of the original IEP being corrected even if other Amendments/Corrections have been completed. They copy from the IEP.*
- The Correction Date should not appear on this form
- The dates should only be changed in a correction if the Initiation Date and Service/Goal Start Date are too far in the future (more than 10 days past the Meeting Date for an Annual IEP)
- If the Initiation Date and Service/Goal Start Date are changed and saved, a window appears to show the Begin Dates for all classroom accommodations, goals, and services, have been updated automatically. Only dates matching the previous Service/Goal Start Date are updated.
- The confirmation box will already be checked
- If there are issues with the Plan Dates contact the Service Desk for assistance.

Correction – Goals and Services

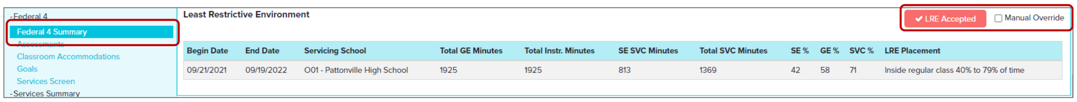
- Goals and Services can be added, edited or deleted in an IEP Correction event if that is the reason for the correction
- Do not make any changes that were not agreed to at the IEP meeting

Revising Goals or Services in an IEP Correction

Goals and Services can be added, edited or deleted in an IEP Correction event if that is the purpose of the correction.

Nothing should be changed that was not discussed at the IEP meeting.

Accept LRE



- LRE must be accepted even if no changes are made to services
- If services are changing, wait until they are finalized to accept the LRE
- Open Federal 4 Summary
- Click “LRE Accepted” or check “Manual Override”
  - Manual overrides do not copy from the previous event and must be redone in all amendments and corrections

Accept LRE

- The LRE must be “accepted” in all IEP Amendment and IEP Correction events even if the services were not changed. Prior to locking
  - Open Federal 4 Summary
  - Click the “LRE Accepted” button
- The IEP Amendment and IEP Correction cannot be locked until the LRE has been “accepted” on the Federal 4 Summary

Lock Amendment or Correction

After making changes and accepting the LRE

- Return to Event Overview
- Validation Check
- Print/preview/proofread
- Lock
- Send copy to parent

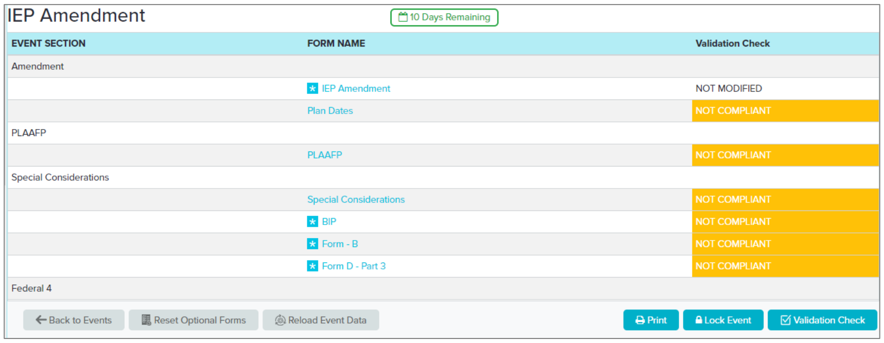
Locking the IEP Amendment or IEP Correction

- When all changes are complete and the LRE has been accepted, return to the Event Overview and do a Validation Check
- **Print/preview/proofread**
- Lock
- Print and send the corrected IEP to parent
- The IEP Correction becomes the "Active Plan" if the Initiation Date has passed

If you have any problems creating, completing or locking an IEP Amendment or IEP Correction event, please contact the Technology Service Desk for assistance

- 314-989-8686
- technologyservices@ssdmo.org
- Create a ticket: https://ssdmo.atlassian.net/servicedesk/customer/portal/4

Validation Check


IEP Amendment

10 Days Remaining

EVENT SECTION	FORM NAME	Validation Check
Amendment		
	IEP Amendment	NOT MODIFIED
	Plan Dates	NOT COMPLIANT
PLAAFP		
	PLAAFP	NOT COMPLIANT
Special Considerations		
	Special Considerations	NOT COMPLIANT
	BIP	NOT COMPLIANT
	Form - B	NOT COMPLIANT
	Form D - Part 3	NOT COMPLIANT
Federal 4		

- Validation Check can be done anytime on Event Overview, a form, or a screen
- Should always be done before locking to catch errors
- Form Status is “Not Modified” or “Not Compliant” until Validation Check is done
- Click **Validation Check**

Validation Check

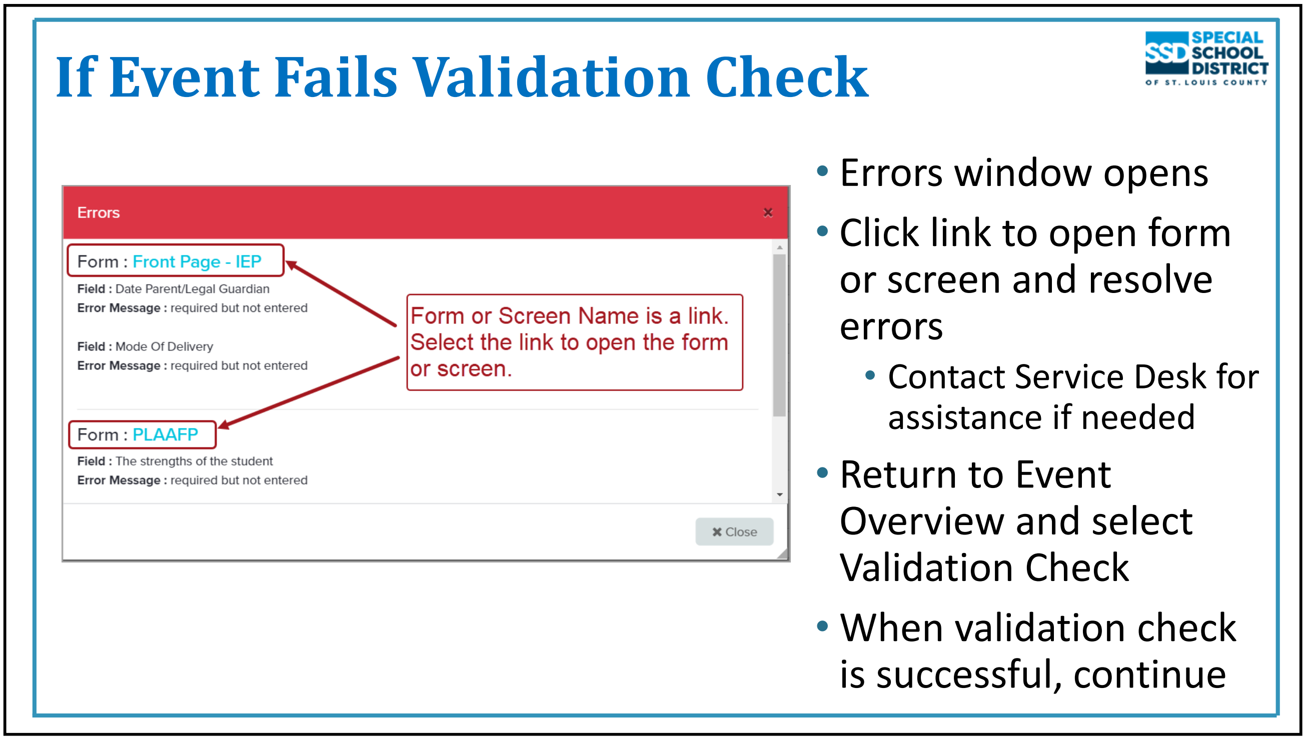
A Validation Check can be done anytime on a form, screen, or on the Event Overview.

- 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



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
- When the Validation Check is completed on a form or screen the window displays errors on that form or screen. The “Show All” button can be used to view all errors in the event.
- Each entry shows where the error occurs
- The name of the form or screen is a link. Click the link to open 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.

Print and Proofread

- 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 therefore, it is very important to proofread before locking.

When the event 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 on a new tab or in a new window 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

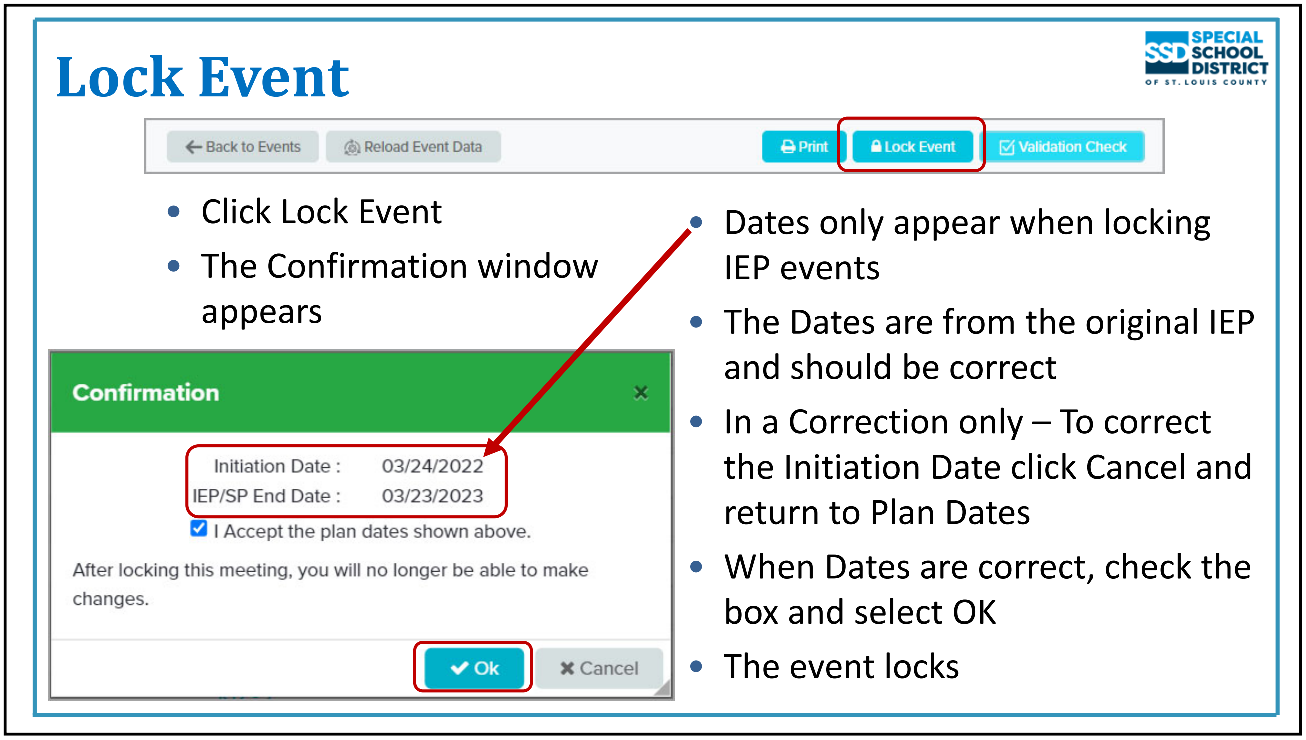
At this point most forms say "DRAFT" across them – exceptions:

- 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 during the IEP, Form C is complete, and goals are marked appropriately for Transition

Close the PDF window/tab



Lock the Event

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. These dates appear on all IEP and SP events

- Amendment: The dates should be correct.
- Correction: Double check the Initiation Date, especially if the purpose of the correction was to fix that date.

Click **OK**.

The event locks.

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. Errors in an amendment can only be corrected by creating and completing another amendment.

Locked Event

Locked Events

	Event Type	Plan Status	Completed Date	Completed By	Actual Date	Due Date
≡	Reevaluation Decision		04/13/2022	TRAIN12 TRAIN12	04/13/2022	11/10/2022
≡	IEP Amendment	ACTIVE	04/13/2022	TRAIN12 TRAIN12	04/06/2022	04/23/2022
≡	└Notification of Meeting - Annual IEP		04/13/2022	TRAIN12 TRAIN12	04/13/2022	03/10/2022
≡	└Annual IEP	END	04/13/2022	TRAIN12 TRAIN12	04/06/2022	03/10/2022

- A locked Amendment and Correction is linked to the original IEP
- Plan Status shows that the new Amendment is the "Active" plan, and the original IEP (previous event) is "End"
- Completed Date = Date the event was locked
- Completed By = Person who locked the event

Locked Event

The locked Amendment or Correction appears on Locked Events linked to the original IEP and any other Amendments or Corrections completed for that IEP.

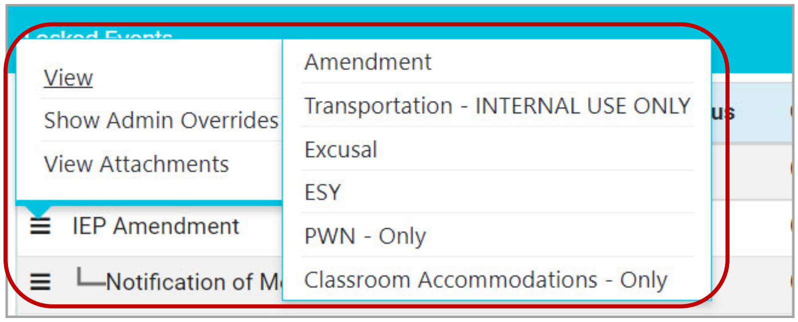
Plan Status shows "ACTIVE" if the Initiation Date is in the past, or "PENDINGACTIVE" if the Initiation Date is in the future. The previous IEP event Status changes to "END".

The Completed Date is the date the event was locked.

Completed By is the person who locked the event.

The Actual Date is the Meeting Date of the original IEP.

View or Print Locked Event



- To view or print a locked event on Locked Events panel
  - Click the hamburger icon
  - Hover on View
  - Choose specific print layout from list

To view or print the locked Event

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:
  - Amendment – opens the complete Amendment
  - Transportation – opens the Services Summary and Transportation forms for use by secretaries entering information into the transportation system
  - Excusal – opens only the Excusal – not included in an Amendment
  - ESY – prints forms needed for ESY programming
  - PWN-Only – opens only the Prior Written Notices completed for the Amendment or Correction – allows the Prior Written Notices to print separately for parent signature (no DRAFT, can be printed before event is locked)
  - Classroom Accommodations-Only – opens only Alternate Form F allowing it to be printed separately from the rest of the Amendment or Correction.

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

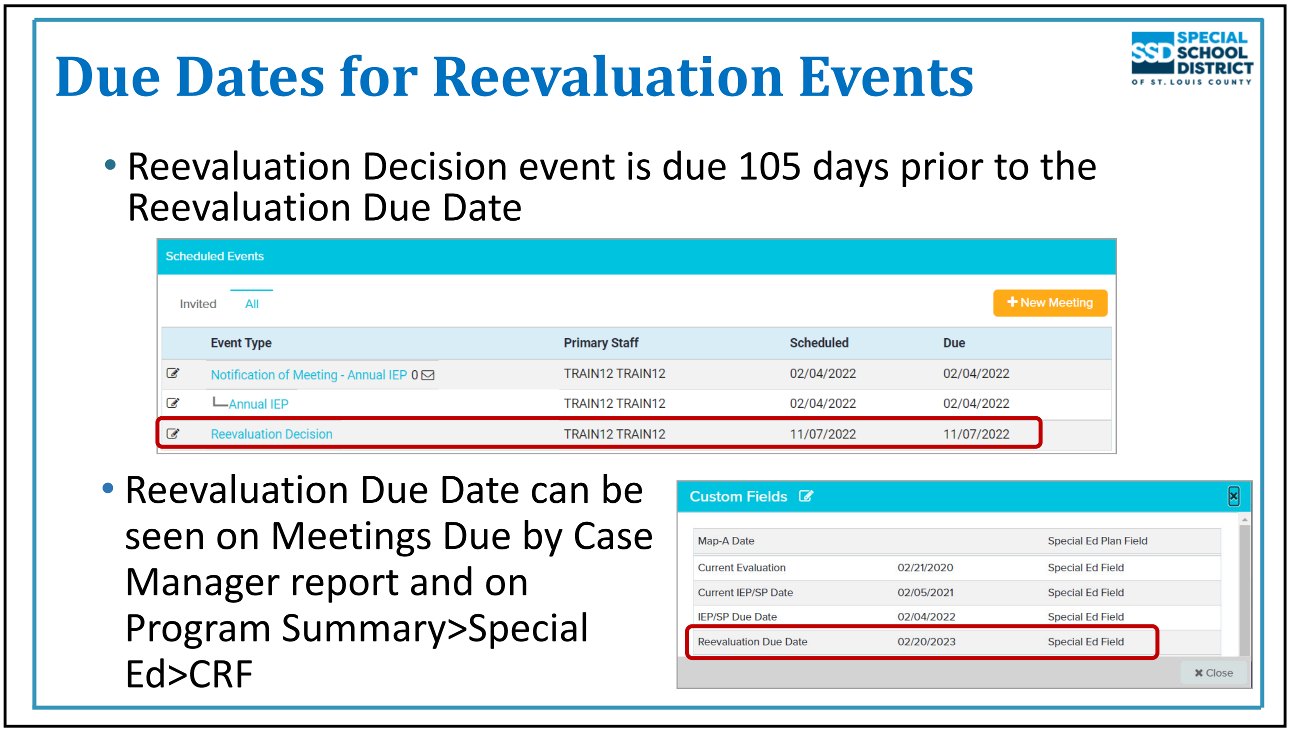
Use the PDF tool bar to print

Close the PDF tab/window.

Reevaluation Process in Phoenix

Reevaluation Process

This section covers steps required when completing a reevaluation in Phoenix. It does not include Special Education Process such as when it might be appropriate to determine a reevaluation is not necessary or the content of the RED. Those questions should be addressed with your SSD Administrator.



Due Dates for Reevaluation Events

Reevaluation Decision Due Date vs. Reevaluation Due Date

- The Reevaluation Decision event is due *105 days prior to the Reevaluation Due Date*
  - Allows for sufficient time before the Reevaluation expires to complete any assessments that may be needed
  - Due Date for the Reevaluation can be viewed on the IEP Front Page of the current IEP, in a report (Case Manager Meetings Due), or on Program Summary>Special Ed>CRF

For all reevaluations the Case Manager initiates the process by completing the Reevaluation Decision event

- Documents the IEP team"s decision that a reevaluation is, or is not, necessary

The Reevaluation event does not appear on the Scheduled Events panel until the decision that a reevaluation is necessary is made, documented on the Reevaluation Decision form, and the Reevaluation Decision event is locked.

Reevaluation Decision Event

- First step in the Reevaluation Process
- Decision that a reevaluation is, or is not, necessary is made before completing the event
- Decision is documented on the Reevaluation Decision form
- Appropriate form or event is created
  - No reevaluation: TED is created in the Reevaluation Decision event
  - Reevaluation: Reevaluation event is created when the Decision event is locked

Reevaluation Decision Event

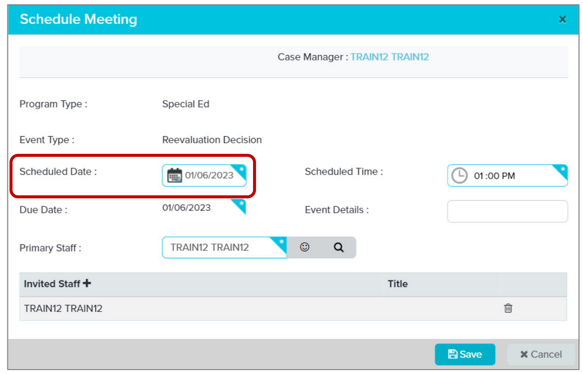
The first step in the Reevaluation Process is to make the decision that a reevaluation is, or is not, necessary and document it in the Reevaluation Decision event. The decision is made by the parent/guardian/student age 18+, a representative of the partner district, and a representative of SSD (usually the Case Manager). All three must agree if a reevaluation will not be completed.

The decision is documented on the Reevaluation Decision form in the event.

- If “Reevaluation is Not Necessary” is selected the Triennial Evaluation Documentation (TED) form is created and completed in the Reevaluation Decision event.
- If “RED/Reevaluation” is selected, the Notification of Meeting – Reevaluation and Reevaluation events are created when the Reevaluation Decision event is locked.

Reevaluation Decision Event Date

- The Scheduled Date must be changed to the date the decision was made that a Reevaluation is or is not necessary
  - Open the student's Events panel
  - Click the pencil icon
  - Enter a new Scheduled Date (must be current date or earlier)
  - Save



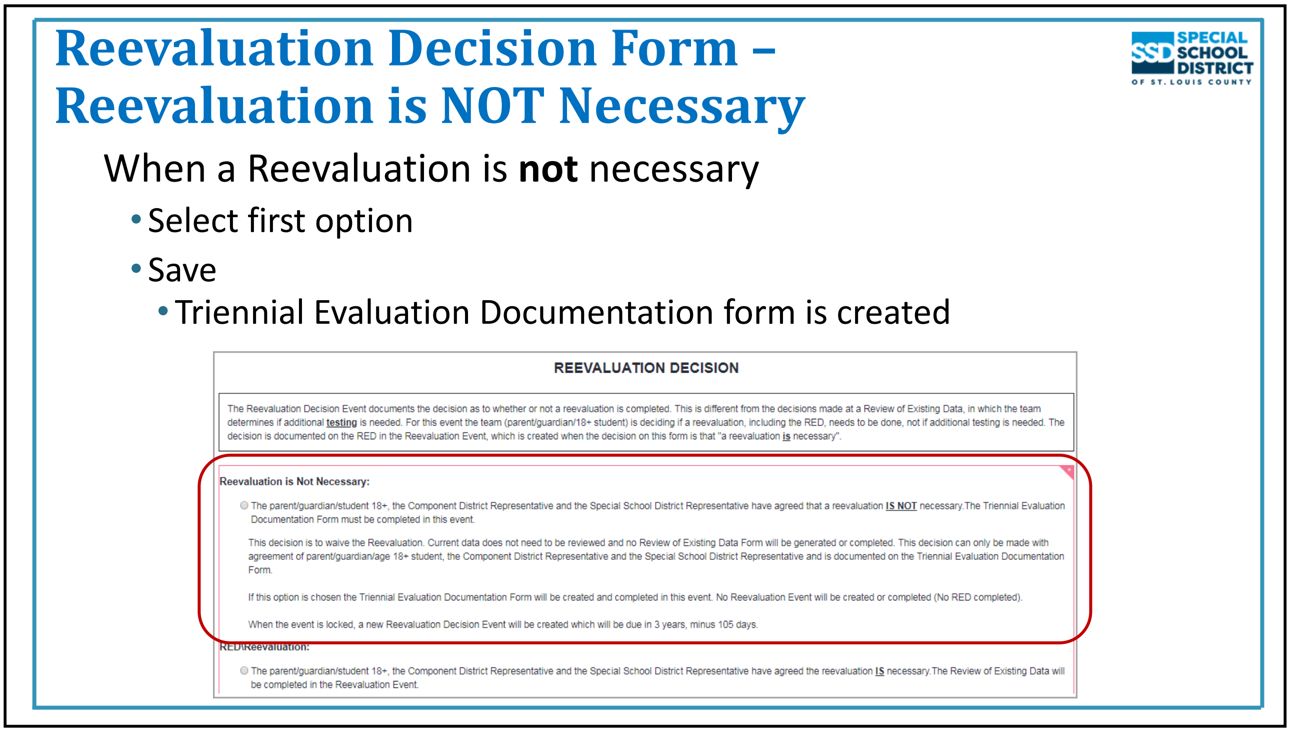
Changing Scheduled Date of Reevaluation Decision Event

Events in Phoenix cannot be locked prior to the Scheduled Date

- If the Scheduled Date of the Reevaluation Decision is in the future, it must be changed to the current or an earlier date. It is the date the decision was made that a reevaluation is, or is not, necessary.
- In most cases, the Reevaluation Decision event will be completed prior to its scheduled date which means, in most cases, the Scheduled Date must be changed
  - Steps to change Scheduled Date are also on **Reevaluation Quick Start Card**

Change the scheduled date to the *date the decision was made regarding the need for a reevaluation*

- Must be the current date or an earlier date
  - Not the date of the RED meeting – must be BEFORE the RED meeting
  - If a Reevaluation is necessary: Reevaluation Decision event must be completed and locked to create the Reevaluation event with the RED
  - If a Reevaluation is not necessary: the Scheduled Date autofills into the Triennial Evaluation Documentation form. It becomes the new Reevaluation Date when the Reevaluation Decision event is locked.
- Use the calendar to select the date
  - Double check the date, particularly the year
- Once information is correct, Save



Reevaluation Decision Form – Reevaluation IS NOT necessary

Reevaluation Flow Charts cover 4 reevaluation scenarios

First example here completes the Reevaluation is **NOT** Necessary scenario

Change the Scheduled Date on the Reevaluation Decision event to the *date decision was made that a Reevaluation is not necessary.*

- Not IEP or RED meeting date

Open the Reevaluation Decision event

Open the Reevaluation Decision form

Information on the form guides you in choosing the correct option based on the decision made (Reevaluation is Not Necessary vs RED/Reevaluation)

When the decision is that a reevaluation is not necessary, and therefore, no RED will be completed, select the first choice: **Reevaluation is Not Necessary**

The Triennial Evaluation Documentation form is created on the Forms List Panel in the Reevaluation Decision event

Save

Triennial Evaluation Documentation

- Parent/Guardian/Student (18+), Component District Rep. and SSD Rep. must **all** agree. If they do not, a reevaluation must be completed.
- Date of Decision is autofilled from Scheduled Date of the event
  - **Next Reevaluation will be due 3 years from this date**

TRIENNIAL EVALUATION DOCUMENTATION

This form documents the decision made by the parent/guardian/student 18+, the Component District Representative, and Special School District Representative that a triennial reevaluation is unnecessary.

Student Name: GREGORY TRAIN   Date of Birth: 07/02/2008

Date of most recent evaluation: 02/21/2020 VTS: Yes No Non-Public: Yes No

Date of decision that a triennial evaluation is unnecessary: 11/03/2021 To revise this date, return to the Events screen and select the Edit Icon to change the Scheduled Date of the Reevaluation Decision Event.

Persons responsible for making this decision:

Parent/Guardian/Student (18+) Name:

Component District Representative:

Special School District Representative:

- Complete required fields and Save
- Select Event Overview Section and do Validation Check
- Lock the Reevaluation Decision event

Triennial Evaluation Documentation Form

- Documents the agreement of parent/guardian/student age 18+, Component District (Partner District) Representative, and SSD Rep (usually the Case Manager) that no reevaluation is necessary and therefore, no RED will be completed
- No Reevaluation event or Review of Existing Data (RED) will be generated or completed
  - Decision is that current data does not need to be reviewed to maintain current eligibility (disabilities)

Complete required fields

- Indicate if the student is a Voluntary Transfer Student (VTS – participates in the Voluntary Interdistrict Transfer Program - student lives in the city but attends school in the county as a part of the Voluntary Transfer Program)
- Choose "No" for Non-Public. "Yes" indicates the student attends a private school and is receiving services through SNAP (Special Non-public Access Program)
- The Date of Decision autofills from the Scheduled Date on the Schedule Meeting window. It cannot be edited here. If it is not accurate, return to the Events Screen, click the Edit icon (the pencil) next to "Reevaluation Decision" and change the Scheduled Date there. Reopen the event and the form for the date to fill in correctly. In order to lock the event this must be the current date or a past date.
  - This date becomes the new Reevaluation Date
- Enter names of Parent/Guardian/Student (18+), Component District Rep and SSD Rep who agreed a Reevaluation is not necessary (if all three did not agree a full reevaluation must be completed.)

Save.

Return to the Overview and complete a Validation Check.

Lock the Reevaluation Decision event. The process is complete.

The Triennial Evaluation Decision form is not sent to the parent.

New Reevaluation Decision event is created which is due in 3 years minus 105 days (990 days) from the Scheduled Date of the locked Reevaluation Decision event (the date that appears on the Triennial Evaluation Documentation form).

New Reevaluation Date appears on Student Profile>Summary panel. on the Front Page-IEP in future IEPs, and in reports.

Case Manager Responsibilities – Reevaluation Is Not Necessary

SPECIAL SCHOOL DISTRICT OF ST. LOUIS COUNTY

- Contact Parent/Guardian/Student (18+) and Component District Representative for agreement.
    - Current data is not reviewed on a Review of Existing Data form
- Complete Triennial Evaluation Documentation form
    - Double check the "Date of decision that a triennial evaluation is unnecessary".
        - If the date on the form is not correct, return to Events screen and change the Scheduled Date of the Reevaluation Decision event
- Lock the Reevaluation Decision event
    - New Revaluation Decision event is created – due in 3 years minus 105 days
    - No Reevaluation event is created
- New Reevaluation Date = Scheduled Date of Reevaluation Decision event

Case Manager"s Responsibility – Reevaluation is not necessary

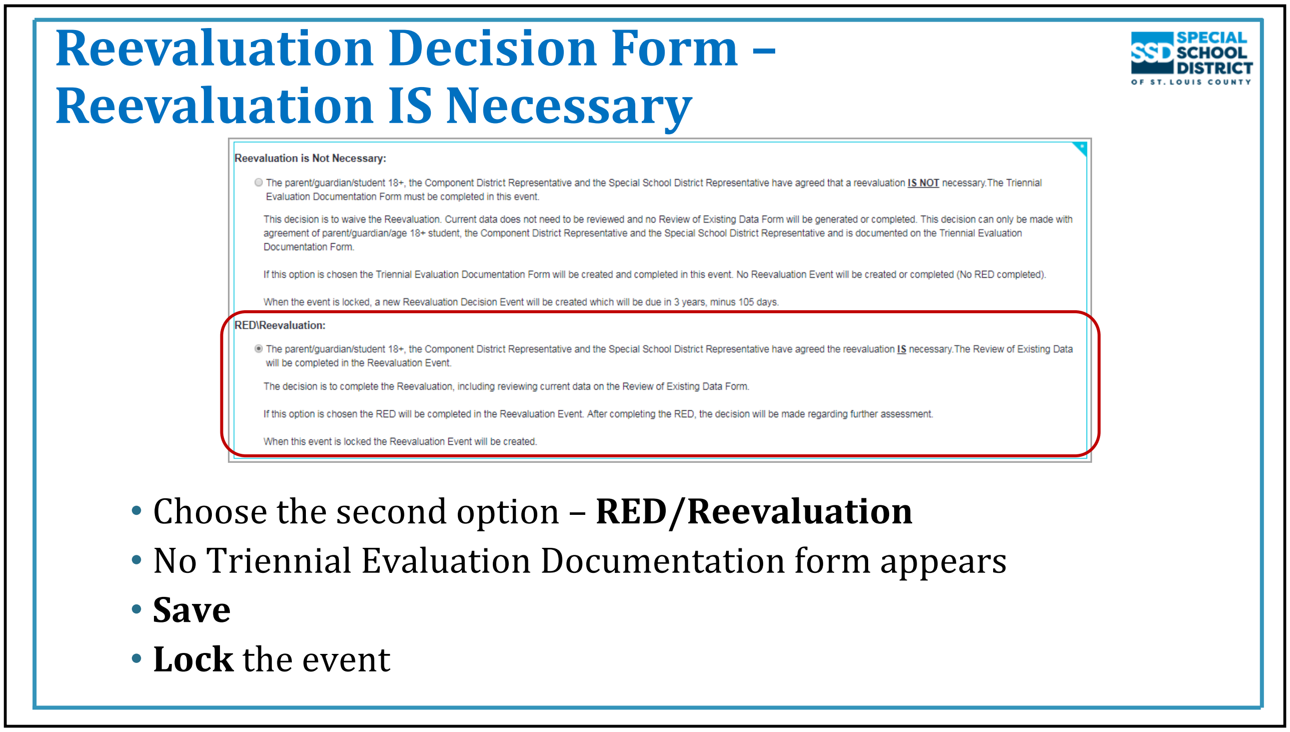
If the “Big 3” (parent/guardian/student 18+, Component (Partner) District Rep, and SSD Rep (Case Manager) agree that a Reevaluation is not necessary, it is the Case Manager’s responsibility to complete the process and lock the Reevaluation Decision event.

In this scenario, the Reevaluation event is not created, data is not reviewed, and the Review of Existing Data form is not completed.

- Complete the Triennial Evaluation Documentation (TED) form
- Check the date the decision was made that no Reevaluation is necessary
    - If the date is not correct, return to the Events page and change the Scheduled Date of the Reevaluation Decision event
    - This date becomes the new Reevaluation Date
- Save the form
- Lock the Reevaluation Decision event

The Reevaluation Date is updated to the Scheduled Date of the Reevaluation Decision event.

Reminder: All scenarios are available on the **Reevaluation Flow Charts**



Reevaluation Decision Form – Reevaluation IS necessary

Second Example completes the Reevaluation **IS** necessary – Maintaining Disability through RED scenario from **Reevaluation Flow Charts** (probably most common)

Change the Scheduled Date on the Reevaluation Decision event to the *date decision was made that a Reevaluation is necessary.*

- Not IEP or RED meeting date

Open the Reevaluation Decision event

Open the Reevaluation Decision form

When the decision is made that a reevaluation *is* necessary, including completing an RED, select the second choice, RED/Reevaluation, on the Reevaluation Decision form

Save the form

Return to the Overview

- Validation Check
- Lock the Reevaluation Decision event

When the Decision event is locked with the choice that *a reevaluation is necessary*, the Notification of Meeting-Reevaluation and Reevaluation event are created

- The Review of Existing Data form is in the Reevaluation event

Reevaluation Event

Scheduled Events

Invited All

+ New Meeting

Event Type	Primary Staff	Scheduled	Due
Notification of Meeting - Annual IEP 0	TRAIN12 TRAIN12	02/04/2022	02/04/2022
└Annual IEP	TRAIN12 TRAIN12	02/04/2022	02/04/2022
Notification of Meeting - Reevaluation 0	TRAIN12 TRAIN12	02/20/2023	02/20/2023
└Reevaluation	TRAIN12 TRAIN12	02/20/2023	02/20/2023

- When the Reevaluation Decision form indicates a Reevaluation is necessary, the Notification of Meeting-Reevaluation and Reevaluation events are created
- The Reevaluation is due on the original due date – should be completed ASAP

Reevaluation Event

Notification of Meeting-Reevaluation and Reevaluation event appear on the Scheduled Events panel

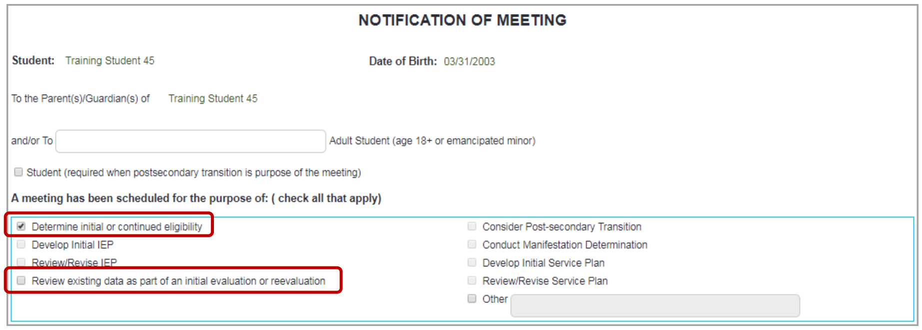
- The RED is in the Reevaluation event

Due Date is the date the Reevaluation is due

- Event should be started as soon as the Reevaluation event is created even if the Reeval is not due for some time. Once the process is started, it should not be left open.

This example completes the maintaining disability scenario.

Notification of Meeting – Reeval (RED)


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)

☑ Determine initial or continued eligibility
☐ Develop Initial IEP
☐ Review/Revise IEP
☐ Review existing data as part of an initial evaluation or reevaluation
☐ Consider Post-secondary Transition
☐ Conduct Manifestation Determination
☐ Develop Initial Service Plan
☐ Review/Revise Service Plan
☐ Other

- Complete NOM for RED meeting
  - Purpose of Meeting is both "Determine initial or continued eligibility" and "Review existing data . . ."
  - Meeting Date is date of RED meeting or date decision is finalized if there is no meeting (team conferred)

Notification of Meeting – Reevaluation

Open the Notification of Meeting event

Open the Notification of Meeting form

Complete required fields

"Determine initial or continued eligibility" is prechecked and cannot be changed

- Check "Review existing data as part of an initial evaluation or reevaluation" as this is the purpose of this meeting

Enter date of RED meeting (or date decisions were finalized through confer process)

- This date can be the same as an IEP meeting or it can be a separate meeting
- Can be the date the decisions were finalized if the decisions were made by conferring only
- If no additional information is necessary, this is the new Reevaluation date

Save

Open, Complete, and Save the Record of Attempts form

Create/Store Invite

Print and send NOM to parent

NOTE: The Review of Existing Data meeting can be scheduled on the same day as the IEP. In this case both NOMs should be completed and sent to the parent. The time and participants for each meeting might be different.

Review of Existing Data

Vision: A student's near/far point visual acuity, eye muscle control, depth perception, color blindness, orientation/mobility skills.

Area/Data Source	Type and Description of Data Reviewed (Include name and date of the previous assessment if applicable)	Summary of Information Gained (Describe strengths and concerns)
General Screening		
School Health Records		
Previous Assessments		
Medical Reports		
Teacher		
Parent		
Other		

Further Assessment Information Needed? Yes No   Assessment instruments, if known

- Data collected and entered in 11 areas of RED
- After reviewing at meeting, or conferring, decision made if further assessment is needed for each area

Review of Existing Data

Open the Reevaluation event

Open the Review of Existing Data Page 1

Complete top of form

Current eligibility includes only the student's primary disability. The Primary Disability can be seen on the Disabilities screen in the Eligibility section.

Choose Reevaluation

Choose Met or Conferred or both

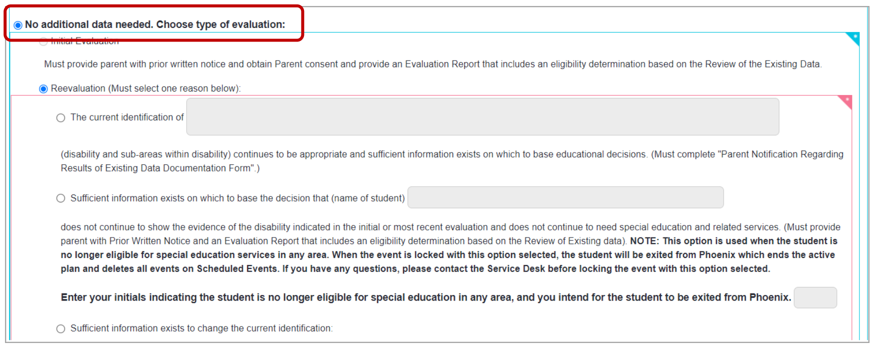
Complete RED pages 1 – 4 with input from school personnel, parent and student (if appropriate)

The "Further Assessment Information Needed" question at the end of each section is not completed until either the meeting has been held or all participants have been consulted and agree.

After reviewing pages 1-4 at meeting, or by consulting with the team, indicate if additional information is needed for each section.

- If any section is marked "Yes", the decision is *additional information (assessment) is needed*
- If all sections are marked "No", the decision is *no additional information is needed*

No Additional Data Needed – Team Conclusions and Decisions


No additional data needed. Choose type of evaluation:

Initial Evaluation

Must provide parent with prior written notice and obtain Parent consent and provide an Evaluation Report that includes an eligibility determination based on the Review of the Existing Data.

Reevaluation (Must select one reason below):

The current identification of

(disability and sub-areas within disability) continues to be appropriate and sufficient information exists on which to base educational decisions. (Must complete "Parent Notification Regarding Results of Existing Data Documentation Form".)

Sufficient information exists on which to base the decision that (name of student)

does not continue to show the evidence of the disability indicated in the initial or most recent evaluation and does not continue to need special education and related services. (Must provide parent with Prior Written Notice and an Evaluation Report that includes an eligibility determination based on the Review of Existing data). **NOTE: This option is used when the student is no longer eligible for special education services in any area. When the event is locked with this option selected, the student will be exited from Phoenix which ends the active plan and deletes all events on Scheduled Events. If you have any questions, please contact the Service Desk before locking the event with this option selected.**

Enter your initials indicating the student is no longer eligible for special education in any area, and you intend for the student to be exited from Phoenix.

Sufficient information exists to change the current identification:

- If all areas indicate No Further Assessment needed
  - Choose second option: "No additional data is needed"
- If changes are being made to eligibility, contact SLP or School Psychologist for assistance with this form

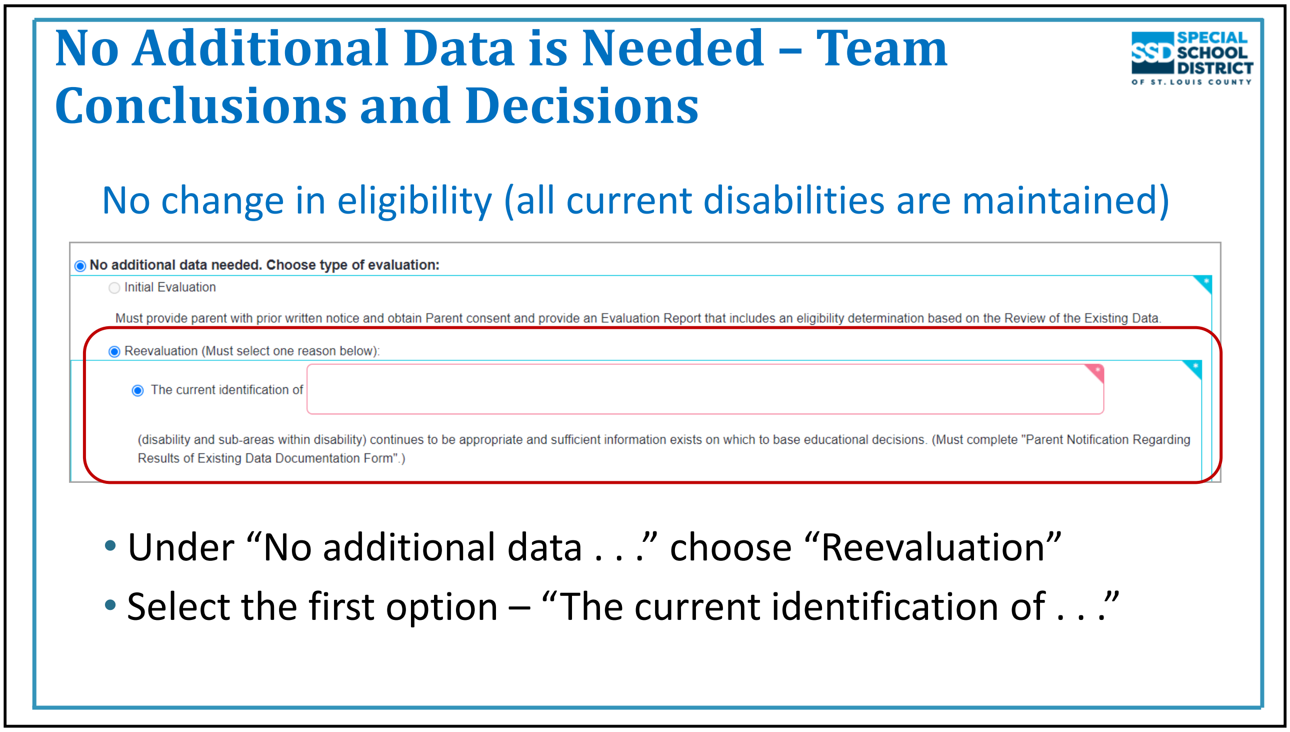
Review of Existing Data – Team Conclusions and Decisions – No Additional Data is Needed

After the RED meeting or confer process is complete, open Team Conclusions and Decisions.

If the team decision is no additional data is needed in order to confirm the current identification (disability)

- Choose the second option: "No additional data is needed"

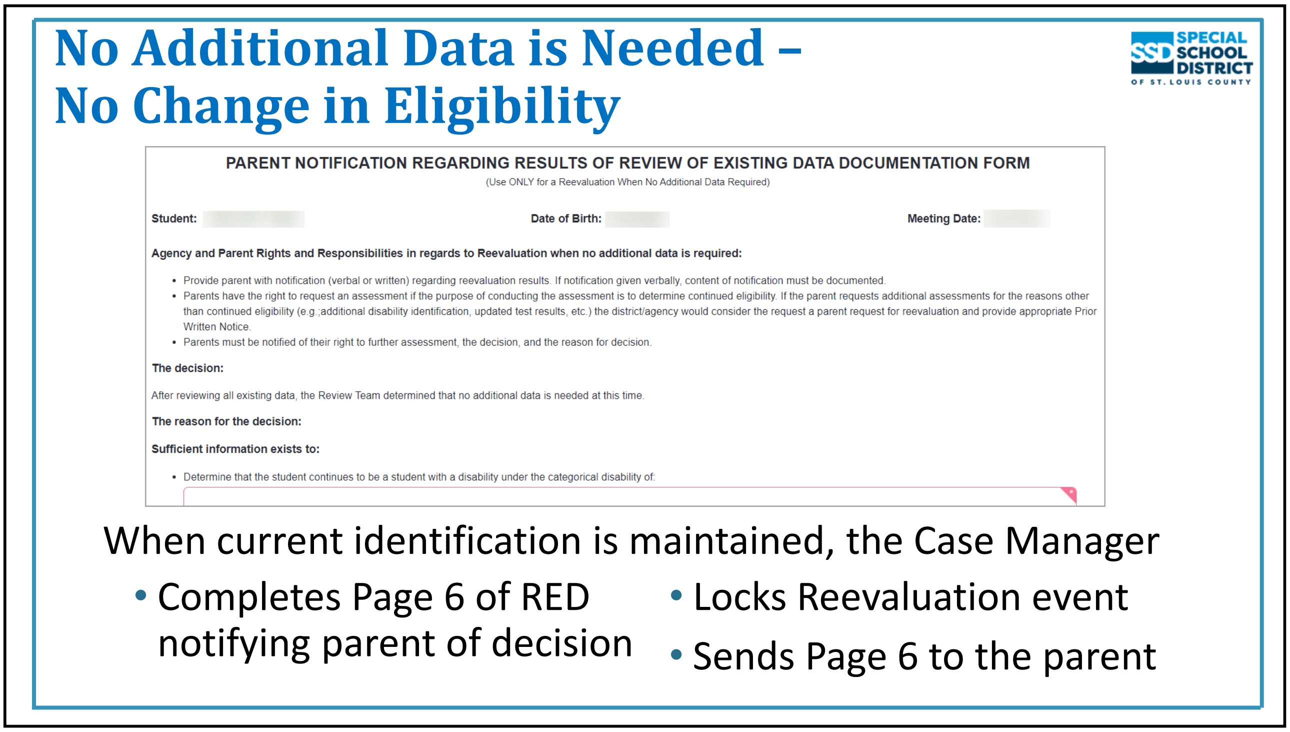
If the team decision is to change the student's eligibility – either the student is no longer eligible or a disability will be added or dropped – and you are a Special Education teacher, contact the SLP or School Psychologist in your building to assist with completing this form and the rest of the process. In those scenarios a report must be completed and sent to the parent. Evaluation Chairs are trained in this process.



Review of Existing Data – Team Conclusions and Decisions

When there is no change in eligibility (no disabilities are added or dropped):

- Select "No additional data needed."
- Select "Reevaluation"
- Select the first option:
  - "The current identification of ___continues to be appropriate. . ." and complete the box including *all disabilities and all areas*.
    - RED Page 6 is created on the Forms List Panel
- Complete the remainder of the form (date and participants)
- Save



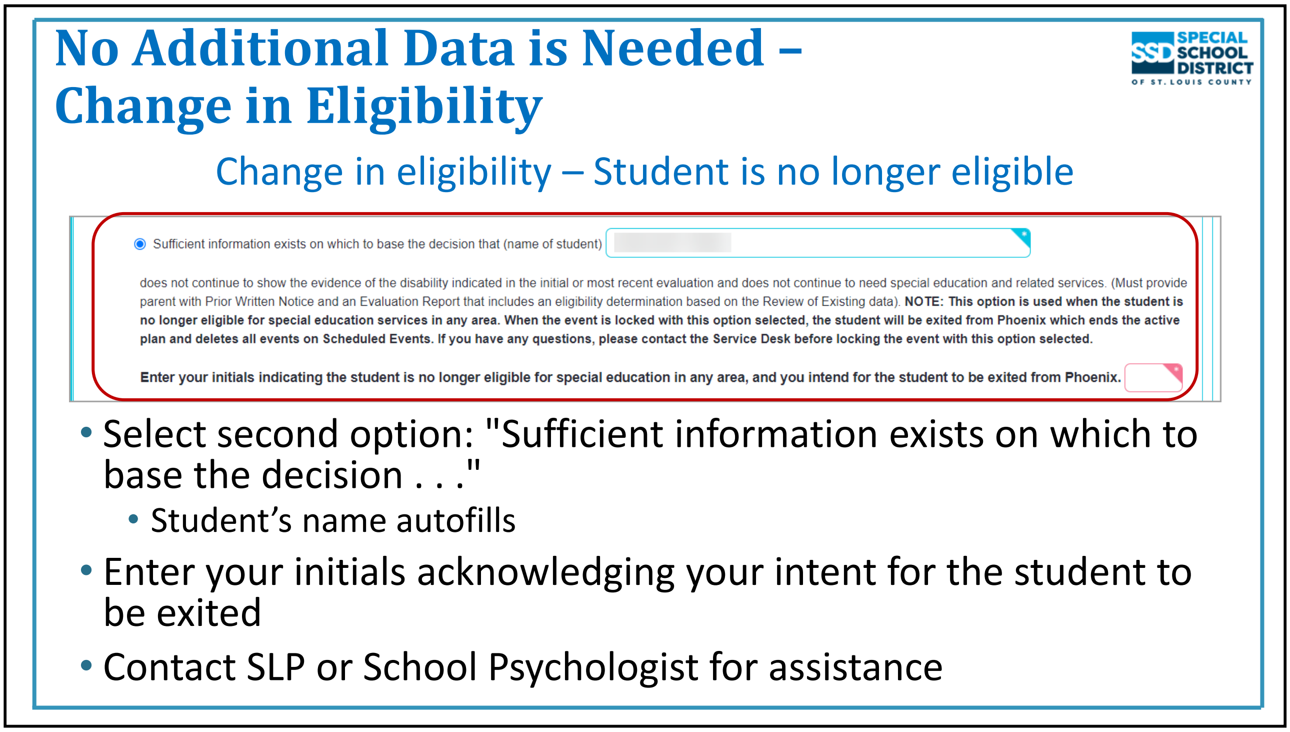
Review of Existing Data – Page 6 (Parent Notification Regarding Results of Review of Existing Data Documentation Form)

***NOTE:** When the first option under Reevaluation is chosen on Team Conclusions and Decisions (maintaining current disability), Page 6 of the RED, Parent Notification Regarding Results of Review of Existing Data appears on the Forms List Panel.

- Open RED Page 6 and complete
- Save
- Return to Event Overview / Complete Validation Check / Lock

In the scenario when the disability is maintained through the RED the Case Manager

- Completes pages 1-4 of the RED
- Meets/Confers with the team to complete Team Conclusions and Decisions
- Completes RED Page 6 (Parental Notification)
- Locks the Reevaluation event
- Sends Page 6 to the parent.
- Checks the Reevaluation dates on the Front Page of the IEP and updates them if needed
- Documents the decision in the Present Level of the IEP



Review of Existing Data – Team Conclusions and Decisions – Change in Eligibility

Student is no longer eligible

If the student is no longer eligible for ANY special education disability

- Choose "No additional data needed."
- Choose "Reevaluation"
- Select the second option:
  - "Sufficient information exists on which to base the decision that (name of student) . . ."
  - The student's name autofills
  - Enter your initials acknowledging the student is no longer eligible for special education in any area, and you intend for the student to be exited from Phoenix
- Complete the remainder of the form (date and participants)
- Save
- ***Do NOT lock the event*** – an Evaluation Chair (School Psychologist or SLP) must complete and lock the event

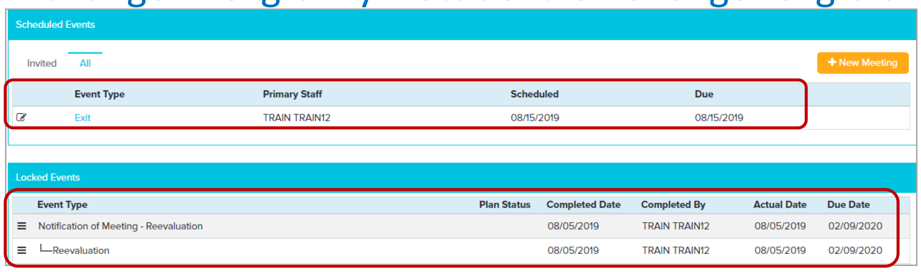
This scenario requires a Prior Written Notice and an Evaluation Report to be provided to the parent.

- Special Education Teachers must contact the SLP or School Psychologist in their building who will assist with finishing the process. This includes assisting with completing Team Conclusions and the Prior Written Notice.
- The SLP or School Psychologist will complete the Evaluation Report, lock the event, and submit the report request to Word Processing for a copy to be sent to the parent.

In this scenario the Case Manager does not lock the event or send anything to the parent. The event will be locked by the SLP or School Psychologist. An evaluation report will be sent by Word Processing.

No Additional Data is Needed – Change in Eligibility

Change in eligibility – Student is no longer eligible



If the student is no longer eligible, Reevaluation is locked by the SLP or School Psychologist

- Student is exited from Phoenix
- Exit event is created – completed by SLP or School Psychologist
- All other future events are deleted

Student No Longer Eligible (dropping all disabilities)

When a student is found to be no longer eligible for special education services, either with or without assessment, and the Reevaluation Event is locked

- The student is exited (withdrawn) from Phoenix
- The Exit event is created
- All other events (IEPs, etc.) are deleted from the Scheduled Events panel even if they are in progress
- The status of the current IEP (on Locked Events) changes to "END"
- The student's status changes to "Reevaluation-No Longer Eligible"

The SLP or School Psychologist assisting with the Reevaluation will complete the Exit Event.

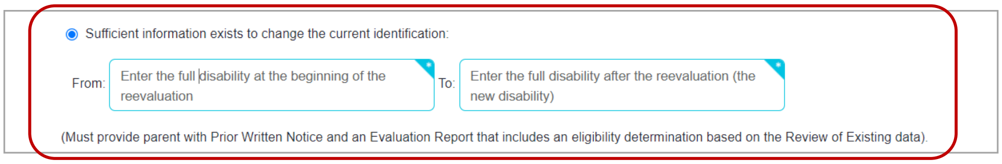
The student is exited from Phoenix as soon as the Reevaluation dropping all services is locked. The Exit Event documents the reason the student is exited.

Once students are exited, they can only be found in Phoenix using the Withdrawn Student Search

- Must know either the student's SSD number, the MOSIS ID, or their First Name, Last Name and complete Date of Birth to use the Withdrawn Student Search

No Additional Data is Needed – Change in Eligibility

Change in eligibility (adding or dropping a disability)



- Select third option: “Sufficient information exists to change the current identification:”
- Enter the full disability as it was at the beginning of the reevaluation process
- Enter the full new disability
- Contact SLP or School Psychologist for assistance

Review of Existing Data – Team Conclusions and Decisions – Change in Eligibility

Change in the student’s areas of eligibility (the disabilities)

If the student’s disability is changing (a disability is being added or dropped but the student is still eligible)

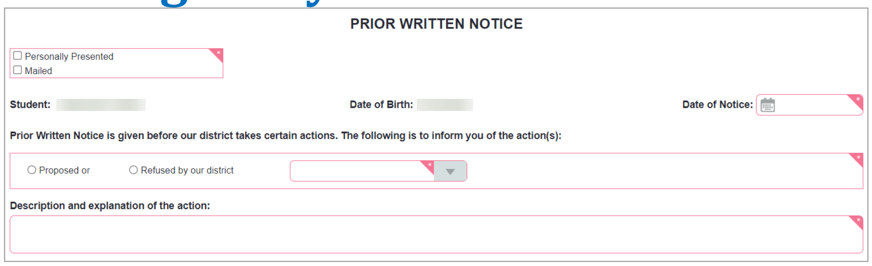
- Select "No additional data needed."
- Select "Reevaluation"
- Select the third option:
  - "Sufficient information exists to change the current identification:"
  - Enter the full disability as it was at the beginning of the reevaluation
  - Enter the full new disability
- Complete the remainder of the form (date and participants)
- Save
- **Do NOT lock the event** – an Evaluation Chair (School Psychologist or SLP) must complete and lock the event

This scenario requires a Prior Written Notice and an Evaluation Report to be provided to the parent.

- Special Education Teachers must contact the SLP or School Psychologist in their building who will assist with finishing the process. This includes assisting with completing Team Conclusions and the Prior Written Notice.
- The SLP or School Psychologist will complete the Evaluation Report, lock the event, and submit the report request to Word Processing for a copy to be sent to the parent.

In this scenario the Case Manager does not lock the event or send anything to the parent. The event will be locked by the SLP or School Psychologist. An evaluation report will be sent by Word Processing.

No Additional Data is Needed
Change in Eligibility – PWN – No Consent


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

Description and explanation of the action:

- When eligibility is changing (student is no longer eligible or disability is changing) the PWN-No Consent is completed
- Consult with School Psychologist or SLP for assistance with completing the PWN and completing/submitting the Evaluation Report
  - The report must be submitted to Word Processing by an Evaluation Chair

Prior Written Notice – No Consent (used when the student's eligibility is changed: dropping all services or changing disability areas)

There are 2 types of PWNs in the event

PWN Add'l Data – used only when additional assessment will be completed

- Completed by the Evaluation Chair, cannot be completed by a Special Education Teacher

PWN No Consent – used when informing the parent of the result of the RED when the student's eligibility is changing (student is no longer eligible or a disability is being added or dropped)

- Can be completed by Special Education Teacher or Evaluation Chair

Special Education Teachers: After completing Pages 1-4 of the RED and meeting or conferring with the team, contact the School Psychologist or SLP in your building for assistance with completing the PWN.

Case Manager Responsibilities – Reevaluation – No Additional Data

- Complete Notification of Meeting for RED/Reevaluation
- Complete pages 1-4 of RED entering data collected from parent, school, Special Education staff
- Team reviews data (meet or confer)
- Decision is made that no additional data is needed
- If no eligibility changes, complete Team Conclusions and Decisions documenting team's decision
- If eligibility changes, contact SLP or School Psych for assistance with completing the process

Case Manager Responsibilities – Reevaluation IS necessary – No Additional Data Needed

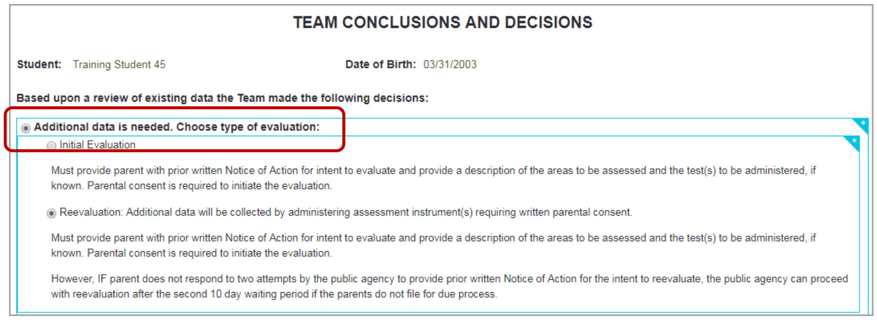
Summarizing the Case Manager's responsibilities when a reevaluation is completed with no additional data needed:

- Complete the Notification of Meeting with the date of the RED/Reevaluation meeting or the date the team conferred about the data
  - Completed even if one was completed in the IEP indicating that a reevaluation is being completed
  - Phoenix uses the meeting date on this form as the date of the Reevaluation

- Gather information from school staff, the parent, and student (if appropriate) to complete Pages 1 thru 4 of the Review of Existing Data

- After meeting or conferring with the team to review the data – decision is no additional data is needed
  - No change to the student's eligibility (all disability areas are being maintained)
    - Complete Team Conclusions and Decisions indicating no additional data is needed and the current disability continues to be appropriate.
    - Complete RED Page 6.
    - **Lock the event.**
  - Eligibility is changing (dropping all services or changing the disability and student is still eligible)
    - Contact the SLP or School Psychologist in your building for assistance with completing Team Conclusions and finishing the process (report and submitting to Word Processing to be sent to parent).
    - **Do NOT lock the event.** It will be locked by the SLP or School Psychologist.

Additional Data Is Needed – Team Conclusions and Decisions


TEAM CONCLUSIONS AND DECISIONS

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

Based upon a review of existing data the Team made the following decisions:

Additional data is needed. Choose type of evaluation:

Initial Evaluation

Must provide parent with prior written Notice of Action for intent to evaluate and provide a description of the areas to be assessed and the test(s) to be administered, if known. Parental consent is required to initiate the evaluation.

Reevaluation: Additional data will be collected by administering assessment instrument(s) requiring written parental consent.

Must provide parent with prior written Notice of Action for intent to evaluate and provide a description of the areas to be assessed and the test(s) to be administered, if known. Parental consent is required to initiate the evaluation.

However, IF parent does not respond to two attempts by the public agency to provide prior written Notice of Action for the intent to reevaluate, the public agency can proceed with reevaluation after the second 10 day waiting period if the parents do not file for due process.

- If additional data is needed, Case Manager contacts the Evaluation Chair who will assist in completing the Team Conclusions and Decisions form

Additional Data is needed – Team Conclusions and Decisions

If "Yes" is selected for any area on pages 1-4 of the RED, the decision is additional data IS needed.

- Select "Additional data needed."
- Select "Reevaluation"
- Complete the remainder of the form (date and participants)
- Save

Additional Data is Needed – Notify Evaluation Chair

- Within 3 days of decision (RED meeting) notify the Evaluation Chair that additional data is needed
  - Evaluation Chair should be invited to the RED meeting if assessment is being considered
- Do not lock the Reevaluation event
- The Evaluation Chair
  - Obtains consent to complete assessments
  - Completes assessments as needed
  - Schedules and chairs Eligibility Conference
  - Completes and locks Reevaluation event
  - Submits report to Word Processing

Notify Evaluation Chair

Within 3 days of the decision that additional information is needed the Case Manager notifies the Evaluation Chair* of the request for assessment (Evaluation Chair should attend the Review of Existing Data meeting if possible – should be consulted if unable to attend)

***Note: As the RED is being completed, if concerns are present in any section of the RED, a representative of that area of concern should be invited to the Review of Existing Data meeting. This will allow that person to provide input into the decision-making process and answer any questions the parent may have as well as possibly having the PWN – Add'l Data (for consent for testing) signed at the meeting.**

If additional data is needed, the Case Manager does NOT lock the Reevaluation Event or send anything to the parent

After notifying the Evaluation Chair, the Case Manager's responsibilities end. You will be a member of the evaluation team and, as such, may be asked to do observations, complete behavior scales, etc., and attend the Eligibility Conference.

The Evaluation Chair obtains consent, conducts any assessments needed, schedules and chairs the eligibility conference, completes and locks the Reevaluation Event, then submits the report to Word Processing. Word Processing sends the written report to the parent.

New Future Event Created

SPECIAL SCHOOL DISTRICT OF ST. LOUIS COUNTY

Scheduled Events

Invited All

+ New Meeting

Event Type	Primary Staff	Scheduled	Due
Notification of Meeting - Annual IEP 1	TRAIN TRAIN12	08/12/2019	11/04/2019
└Annual IEP	TRAIN TRAIN12	08/12/2019	11/04/2019
Reevaluation Decision	TRAIN TRAIN12	04/21/2022	04/21/2022

Locked Events

Event Type	Plan Status	Completed Date	Completed By	Actual Date	Due Date
Notification of Meeting - Reevaluation		08/05/2019	TRAIN TRAIN12	08/05/2019	04/03/2020
└Reevaluation		08/05/2019	TRAIN TRAIN12	08/05/2019	04/03/2020

- When Reevaluation event is locked and student is still eligible, a new Reevaluation Decision event is created
  - Due in 3 years minus 105 days from date of new Reevaluation
  - New Reevaluation Date = Meeting Date of RED meeting (no additional data) or Eligibility Conference (with additional data)

Future Event Created

When a Reevaluation Event is locked, either with or without additional assessment, and the student will continue to receive services, a new, future, Reevaluation Decision event is created

- Due in 3 years minus 105 days from the date of the new reevaluation

The new Reevaluation Due Date can be seen on the Program Summary>Special Ed>CRF link, on the Case Manager's Meetings Due report and on the Front Page – IEP in future IEP events.

If the outcome of the Reevaluation is no additional data is needed and the student will continue to receive special education services, the Case Manager will print the Parent Notification and send it to the parent.

If the outcome is a change in eligibility, ineligibility, or additional data is needed, the evaluation report is sent to the parents by Word Processing.

Progress Reports

Progress Reports

- Reports are completed for the current IEP, not the current school year
  - When a new IEP is locked, current Progress Reports marked "Complete" move to Program Summary > Plan History
    - Reports on "Pending" are deleted
- Reports are created automatically 10 days prior to the Due Date
- Reports appear on the Dashboard and on the Student Profile
- Can also be created by the user at any time

Progress Reports

Progress reporting is done according to the timeline specified on the Services Summary in the student's IEP. For most students this matches the frequency the school sends report cards to parents but it can be more frequently.

Reports are completed for the current IEP, not the current school year – number of reports on the "Completed" panel at any time will vary by student depending on the number of goals each student has and when the IEP was held. Every student should have at least on set completed from the end of the previous school year.

When a new IEP is locked, the Progress Reports on the "Completed" panel for the previous IEP are moved to the Plan History section of the Special Ed screen. Reports on "Pending" are deleted. New reports are completed for the goals in the new IEP.

Reports are created automatically 10 days prior to the due date for those districts that have provided their calendars to the SEIMS Department.

The reports are available on the Dashboard and on the student's profile – Program Summary>Special Ed as soon as they are created. They become available on Summary>Hot Tasks when they are within 7 days of the Due Date.

They can also be created at any time by the user if the student is on a different schedule or a report is needed.

Accessing Progress Reports

1. Dashboard > Progress Reports section
   a. Due in 8 – 30 days, 0 – 7 days, or Overdue
   b. Reports can be completed for multiple students
2. Student Profile > Summary > Hot Tasks
   a. Reports appear when they are ***within 7 days*** of the Due Date
   b. Reports completed for an Individual Student
3. Student Profile > Program Summary > Special Ed > Progress Reports
   a. Lists of “Pending” and “Complete” reports displays
   b. Reports can be created at any time
   c. Reports completed for an Individual Student

Accessing Progress Reports

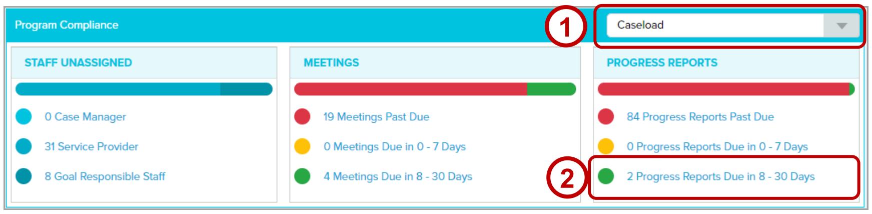
There are three places to access the progress reports:

1. The Dashboard
   a. Reports due in 8-30 days, 0-7 days, and Overdue
   b. Reports can be completed for multiple students

2. Student Profile>Summary>Hot Tasks
   a. Reports appear in the Hot Tasks section when it is within *7 days of the Due Date*
   b. These reports are completed for one student

3. Student Profile>Program Summary>Special Ed>Progress Reports
   a. Two sections – Pending and Complete
      i. When reports are created, they appear on Pending
      ii. When they are marked “Complete” they move to Complete
   b. Reports can be created from here at any time

Progress Reports – Multiple Students
Accessing Reports from the Dashboard



1. Select the filter option you wish to use
   a. Case Manager = only students you Case Manage
   b. Caseload = students you Case Manage, are Primary Staff on an event, Service Provider or Goal Responsible Staff
2. Select the link under Progress Reports for the reports you wish to complete

Accessing Reports from the Dashboard

The Dashboard displays information for all students you Case Manage or are on your Caseload depending on the filter option selected at the top right.

The reports will appear as Due in 8 – 30 days when they are first created. They move up as time passes.

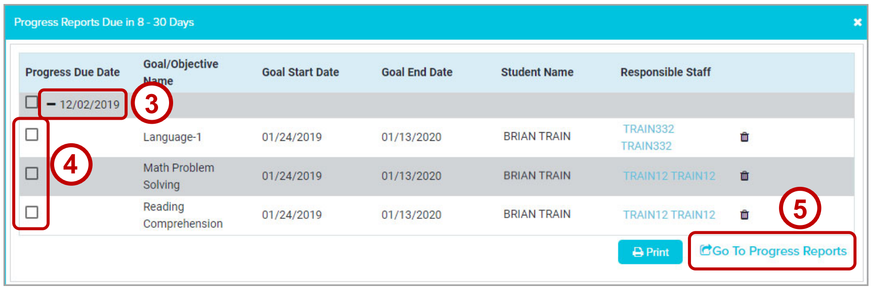
NOTE: Reports are only created for active goals.

1. Choose the filter you wish to use. When completing Progress Reports the better option would be Caseload as this will include all students for whom you are responsible for completing reports not just those you Case Manage. In this case all students on your Phoenix Caseload will appear, even if you are not responsible for any of their progress reports. They may be on your Caseload because you are a service provider.

2. Select the link for the reports you wish to complete (Due in 8-30 days, etc.).

Progress Reports – Multiple Students Dashboard – Select the Reports

- The reports appear below the Program Compliance charts



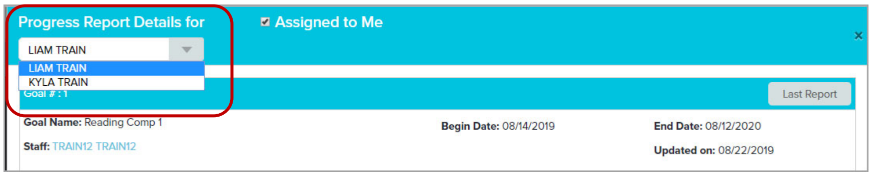
3. Click the date to display the list of reports
4. Select the reports you wish to complete
5. Click Go To Progress Reports

Select the Reports You Wish to Complete

The Progress Reports section opens below Program Compliance. Each date with incomplete reports appears on the table.

1. *Click the date to expand the list of reports due on that date*. Do not check the box in front of the date or all reports will be selected.
2. The name of the person assigned to the goal appears on the table so you can select the reports assigned to you.
3. Check the box for each report you want to complete.
4. Click “Go To Progress Reports” in the lower right

Progress Reports – Multiple Students
Progress Reports Details Window

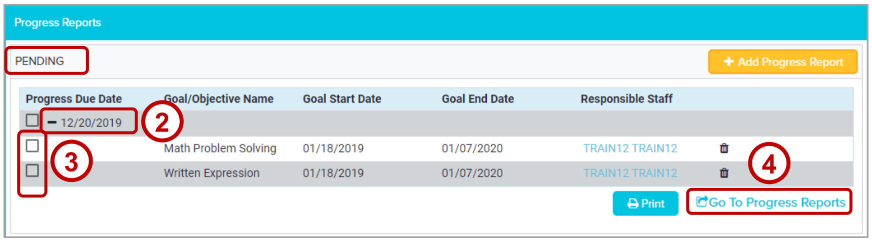


- The Progress Reports window opens to the first report for the first student
- Complete and save the reports for the first student
- Click the menu to select the next student
- When all reports are completed and saved, close

Progress Reports Details Window – Multiple Students

- The Progress Reports Details window opens to the first report for the first student.
- Complete and save the reports for the first student
- Click the menu to select the next student
- When all reports are completed and saved, select Close.

Progress Reports – Single Student
Program Summary > Special Ed

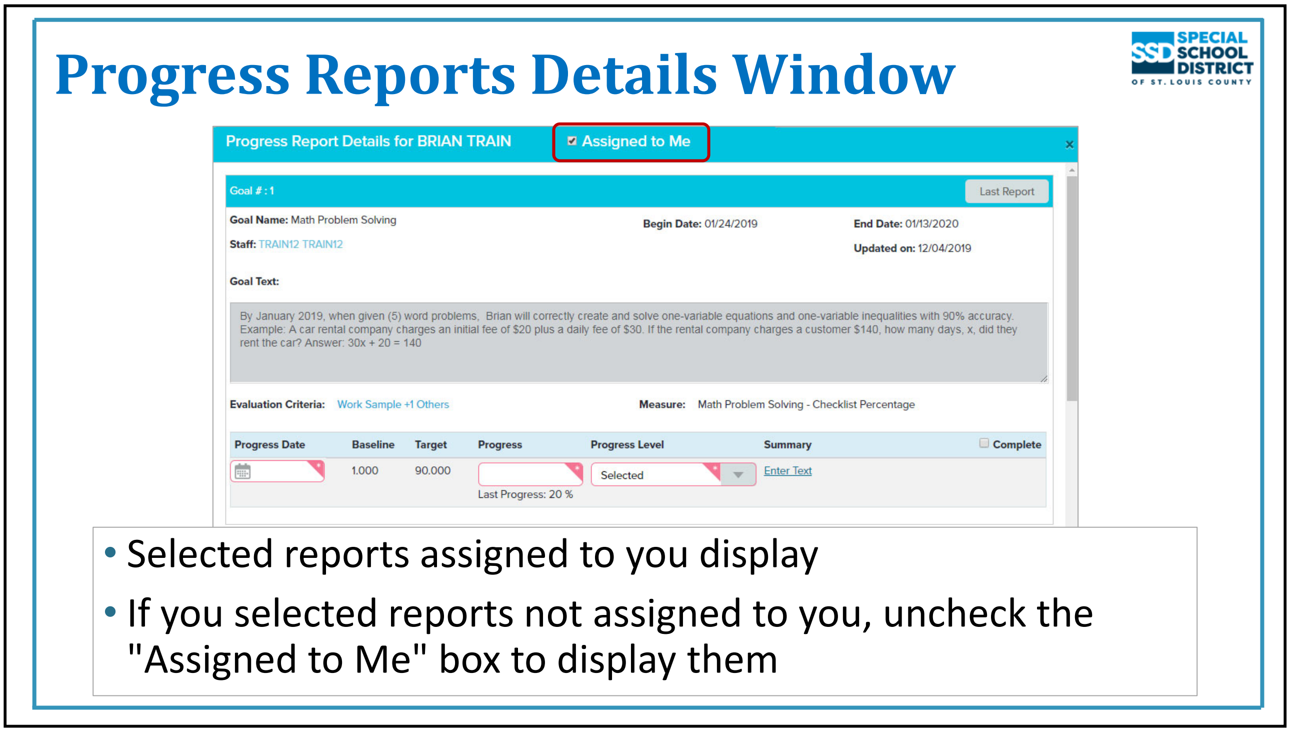


1. Scroll or use the airplane icon to fly to Progress Reports section
2. On the Pending Panel select the date to expand the list of reports
3. Select the reports you wish to complete
4. Click Go to Progress Reports

Access Reports from Program Summary > Special Ed

To complete reports for a single student from the Student Profile:

1. Open the student's profile
2. Select **Special Ed** from the **Program Summary** menu
3. Scroll or use the airplane icon to "fly to" the **Progress Reports** section
4. Incomplete reports appear on the Pending panel
5. Click the **Progress Due Date** to expand the list of reports and display the Responsible Staff name for each report
6. Select the reports you wish to complete
7. Click **"Go To Progress Reports"**
8. The Progress Reports Details window opens

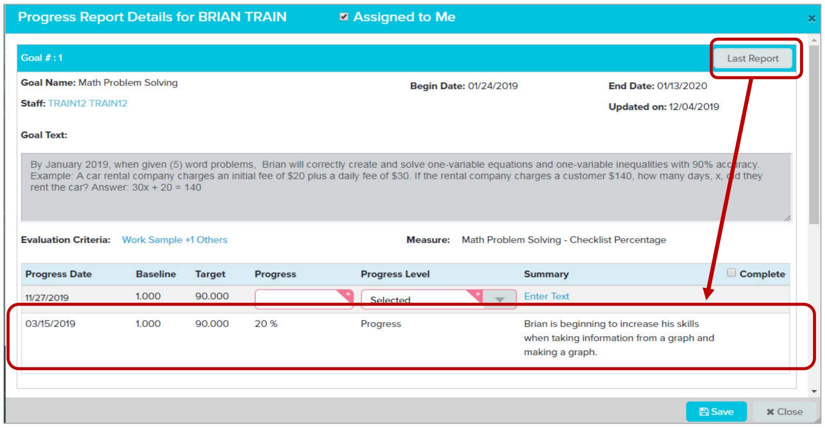


Progress Reports Details Window

When the Progress Reports Details window opens it displays reports assigned to you.

If no reports display, uncheck the box for "Assigned to Me". Reports not assigned to you display.

View Information from Previous Report



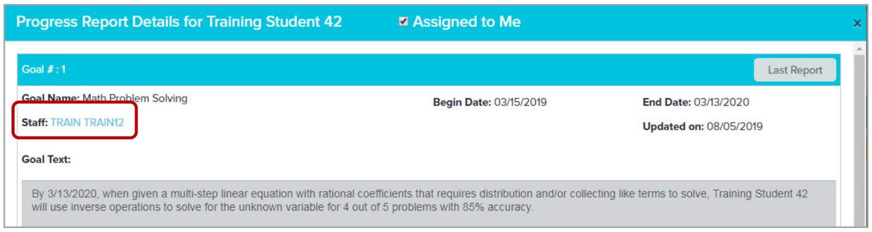
- To view information entered in the previous Progress Report, select "Last Report"
- The information displays below the current report.

View Information from Previous Report

To view the information entered in the previous progress report as a reference, click the “Last Report” button.

The information displays below the current report.

Complete Report – Assigned Staff



- Check Staff Name
- If a different staff member is completing the report, select the name and change it – this name prints on the report
- A report cannot be saved if the Staff is "unassigned"
  - Click "Unassigned" and select the name of the person completing the report
  - This does not update the Goal Responsible Staff

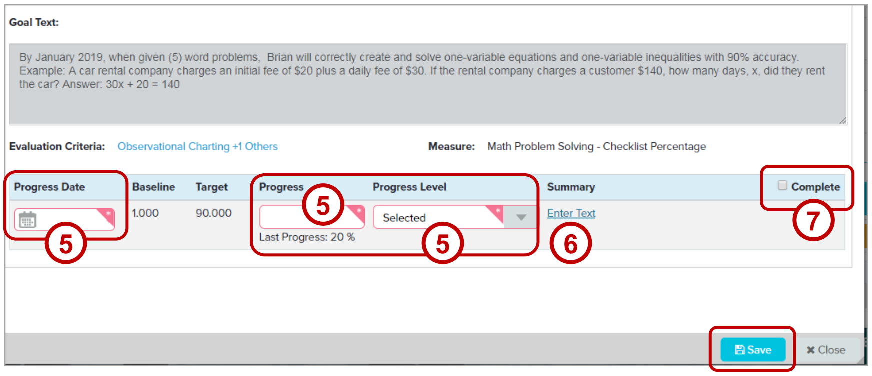
Complete Report – Assigned Staff

If necessary, update the Staff name. This is the person completing this report and the name that prints on the report. To change it, click the name then use the Staff Editor to assign yourself or search for someone else.

The report must be assigned in order to save it. If it is “unassigned”, click the link and use the Staff Editor to assign the person completing the report.

This does not update the Goal Responsible Staff for future reports, however. That must be done on Student Staff Management or Staff Management.

Complete Report Details

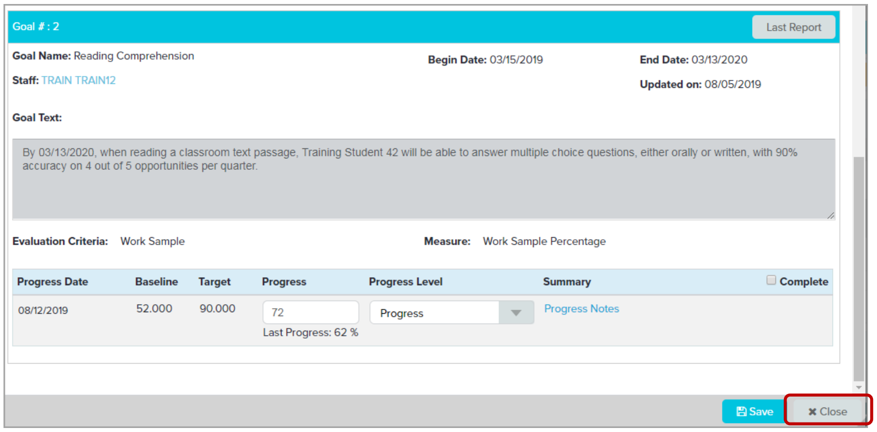


5. Enter Progress Date, Progress (score), and select Progress Level
6. To enter the Summary, click **Enter Text**
7. When report is finished, check **Complete**
8. **Save**

Complete Report Details

1. Enter the **Progress Date**. The date will be
   a. Blank if the report was created by the system
   b. Autofilled if the report was user created
   c. Editable in both cases
2. Enter the **Progress** score. The score can be up to two decimal places.
3. Choose the **Progress Level** from the drop down
   a. Choose "Goal Met" only if the student has met the goal and it will no longer be implemented. Don't use it if the student met the goal this time but will continue to work on it.
4. Enter Progress Notes in the Summary. Click **Enter Text** to open the Summary window.
   a. *Text can be copied from another documented and pasted into the text box – HOWEVER – when pasting be sure to **RIGHT CLICK and select PASTE AS PLAIN TEXT** (or similar option) to avoid issues with saving and printing the report.*
5. If the report is finished, mark the **Complete** box. This moves it to the Complete panel. The report can be reopened and edited if necessary.
   a. Only reports moved to the Complete panel are saved when a new IEP is locked.
6. **Save**

Complete the Next Report

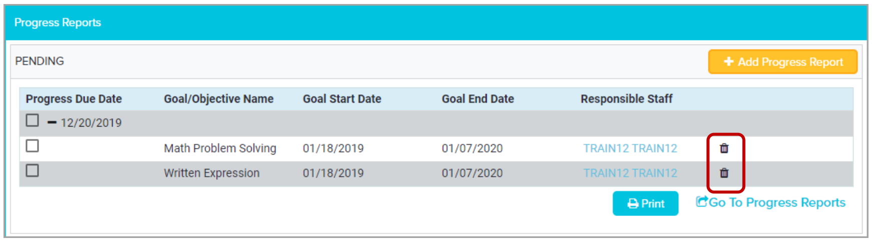


- Scroll to complete next report
- When all reports are completed and saved, click Close

Complete the Next Report

If multiple reports were selected, scroll to continue completing them. When all reports have been completed and saved, select **Close**.

Program Summary>Special Ed Progress Reports Panel



- Reports marked “Complete” move to the Complete panel on Program Summary>Special Ed
- Reports can be deleted from either the Pending or Complete panel by clicking the Delete icon
- To open/edit a report, select the report then click Go To Progress Reports

Progress Reports Panel

Progress Reports Panel includes the Pending and Complete panels.

Reports marked “Complete” are moved to the Complete panel.

Reports can be deleted from either the Pending or Complete panel by clicking the delete icon (the trash can).

To open/edit a report

- Check the box in front of the report
- Click “Go To Progress Reports”

Editing a Completed Report

- Reopen the Progress Report Details window
- Uncheck Complete
- The fields become editable
- Make the needed changes to Progress Date, Progress, Progress Level or Summary
- Mark the report Complete
- Save
- Close

Edit a Completed Report

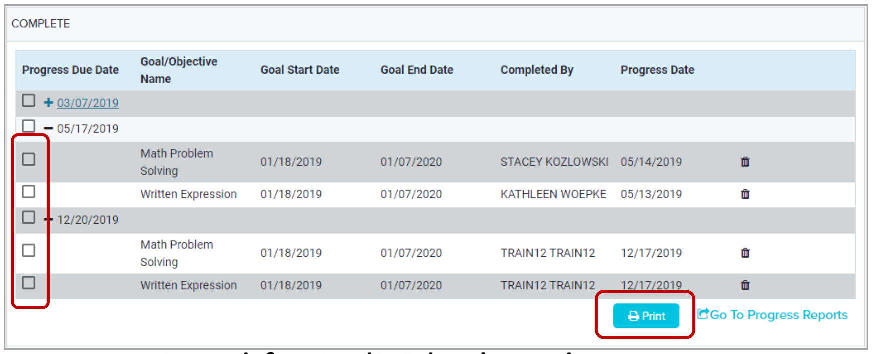
A progress report marked "Complete" moves to the Completed panel. The fields in a completed report are not editable when the Complete box is checked.

To edit a completed report

1. Open the Progress Reports Details window.
    1. Check the box in front of the report
    2. Click "Go to Progress Report"
2. Uncheck **Complete.** The fields become editable.
3. Make the needed changes to **Progress Date**, **Progress**, **Progress Level** or the **Summary**.
4. Mark the report **Complete.**
5. **Save.**
6. **Close.**

NOTE: If the report is saved when the Complete box is not checked, it will move to the Pending panel. Reopen it, check Complete, Save, and Close. It will move back to Complete.

Printing Progress Reports



- Reports are printed for individual students
- Select the goal/goals
- Click Print
- Each goal only needs to be selected one time – all reports for the selected goals print

Printing Progress Reports

Progress reports are printed for one student at a time.

On the Completed panel

- Click the most recent Due Date to expand the list
- If all goals are not included on that date, select other dates until all goals are visible
- Select the goal or goals whose reports you wish to print. It is only necessary to select a goal one time to print all progress for that goal. If selected multiple times a page will print for each selection (if a goal is selected 3 times the same page will print 3 times).
- All reports for the selected goals print – both from the Pending and Complete panels
  - If the report is not complete a blank section will print for that date

NOTE: Reports on both the Pending and Complete panels print, even if a report is blank. It is the responsibility of the Case Manager to print all reports and send them to the parents. You must do everything you can to ensure all providers have completed their reports.

To view reports for previous IEPs, open Program Summary>Plan History on the student's profile. Then choose the IEP you wish to view. The details of the IEP display. Scroll or use the airplane to fly to the Progress Reports panel. All completed reports for that IEP are visible and can be printed.

Creating a Progress Report

For districts where the reports are not being created automatically, or any time a report is needed, a progress report can be created for each active goal.

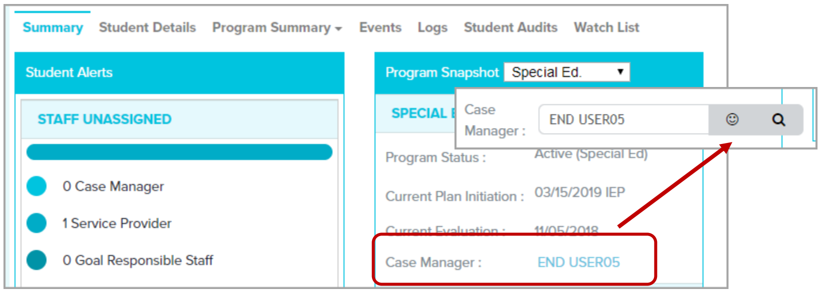
To create a Progress Report, start by opening the student's profile

1. Select **Special Ed** from the Program Summary menu
2. Scroll or use the airplane icon to "fly to" the Progress Reports section
3. Select "**+Add Progress Report"**
4. Select the **Goal**
5. Assign the **Primary Staff** (usually the person creating the report)
6. Edit the **Progress Report** and **Due Dates** if necessary
7. **Save**
    a. The Report is added to the Pending Panel

Changing
Case Manager and Providers

Changing Case Manager

Case Manager can be quickly changed on the Summary panel of the Student Profile

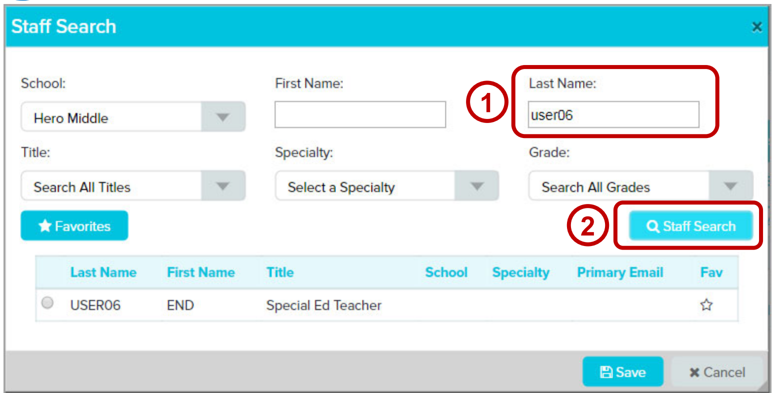


1. Click the name of the current Case Manager
2. On the Staff Editor click the Smile icon to assign yourself or the Search icon to open Staff Search and assign someone else

Changing the Case Manager

- Open the Student's Profile
- Case Manager's name displays on the Program Snapshot of the Summary
- Click the name of the current Case Manager to open the Staff Editor
  - To assign yourself as Case Manager click the smiley face
  - To assign someone else, click the Search icon to open the Staff Search window
    - Choose from one of your Favorites or Search for new Case Manager's name

Creating a Staff Favorites List



Staff Favorites is a user created list to make assigning providers faster.

1. Enter the staff member’s last name
2. Click **Staff Search**

Staff Favorites List

Staff Search Window is used to assign Case Manager and providers to someone other than yourself

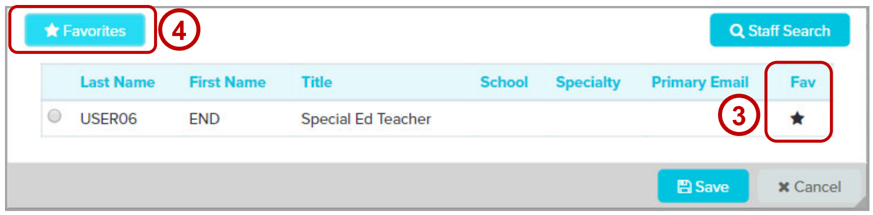
Create a Staff Favorites List to use when assigning providers to goals and services. This is similar to the student Watch List but for staff

- Investing a little time upfront will save time in the long run
- Only need to add a person to the list one time
  - Once added, name can be selected in the Staff Search window to assign to a goal or service rather than searching each time
  - Can be done from several places in the program (wherever a provider is assigned or changed)

On the Staff Editor click the Search icon

- The Staff Search window opens
- Enter the staff member’s last name. The first name can be entered to narrow the search results.
  - The name must match the name as it appears in Phoenix (Robert, not Bob)
- The school defaults to the student’s attending school but can be changed
- Do not change any other fields. SSD does not use Title, Specialty, or Grade.
- Click **Staff Search**

Save and Remove Favorites



3. Click the **Star** under "Fav" to add or remove a Favorite
4. Click the **Favorites** button

- Your Favorites list displays
- The Favorites list saves automatically
- To close the window select Cancel or the X

Save and Remove Favorites

- Name or names matching the search criteria appear
  - Do not select any “SNAP” or “Homebound” accounts unless you are logged in to one of those accounts
- Click the Star under “Fav”. A filled star indicates the person is on your Favorites.
- Favorites save automatically
- Click Favorites to see list
- Continue adding other names
- If just creating the list, click Cancel or the X to close the window.

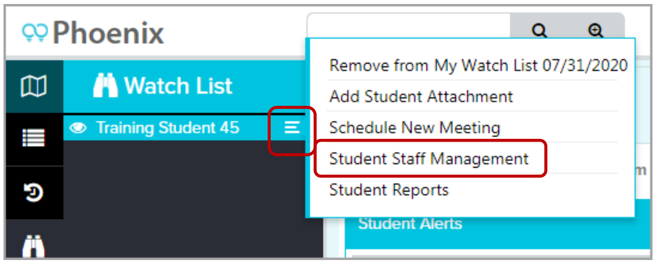
To remove a Favorite

- On the Staff Editor, click the Search icon
- The Staff Search window opens displaying your Favorites
- Click the star for the person you wish to remove. It will turn white.
- Click Favorites to display the list
- The person has been removed
- Favorites save automatically

More detailed instructions are available on Phoenix Help > Navigation

Changing Providers – Single Student

- To change providers (including Case Manager) for a single student



- Locate the student's name on one of your student lists or search
- Click the hamburger icon next to the student"s name
- Select Student Staff Management from the Student List Menu

Changing Providers for Goals and Services

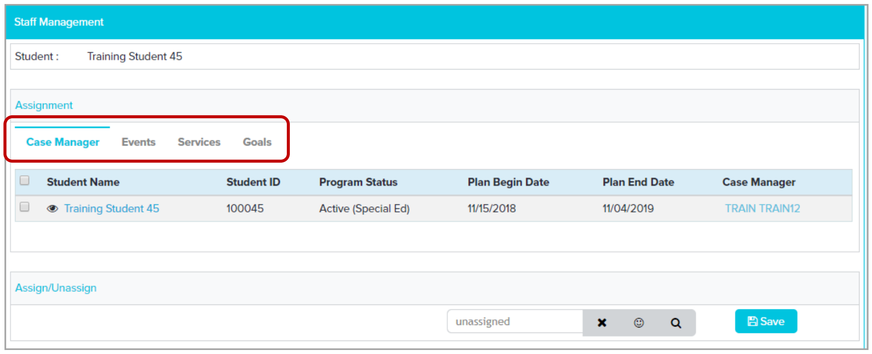
Changing Providers Quick Start Card includes this information

Changing Case Manager, Event Primary Staff, Service Providers and Goal Responsible Staff can be done on Student Staff Management.

To view Student Staff Management

- Click the **hamburger icon** next the student's name.
- Select **Student Staff Management** from the menu.

Student Staff Management



- Can view and change
  - Case Manager
  - Event Primary Staff
  - Service Providers
  - Goal Responsible Staff

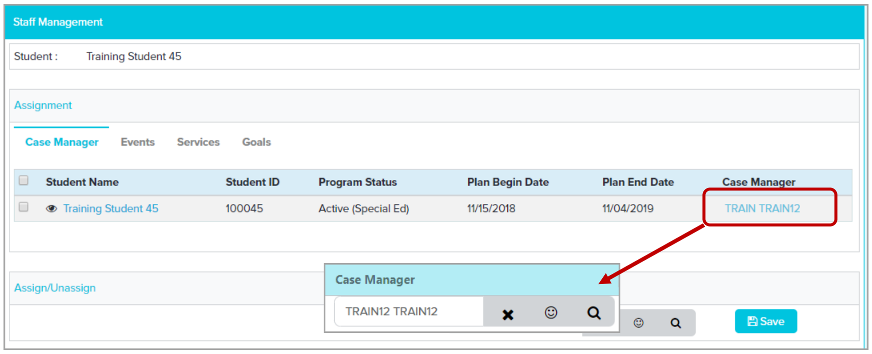
Student Staff Management

Reminder: Services and Goals do not appear on this screen until the Initiation Date of the IEP in which they are included arrives. Prior to that date this screen will continue to display the goals and services from the Active IEP (the one being followed until the new one starts).

On Student Staff Management you can view, assign, reassign, or unassign the student's

- Case Manager
- Event Primary Staff
- Service Providers
- Goal Responsible Staff

Change One Assignment



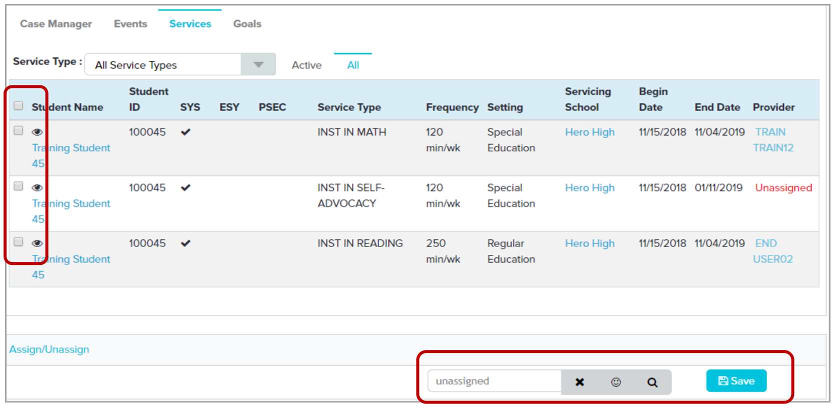
- To change one assignment, click the name of the current Case Manager
- On the Staff Editor click the "X" to unassign, the smile to assign to yourself, or the Search icon to search for and assign to someone else

Change One Assignment

To change the assignment for a single item

- Click the assigned staff member's name
- The Staff Editor opens
- On the Staff Editor click the "X" to unassign the provider, the smile icon to assign yourself or the Search icon to open the Staff Search window and assign someone else

Change Multiple Assignments



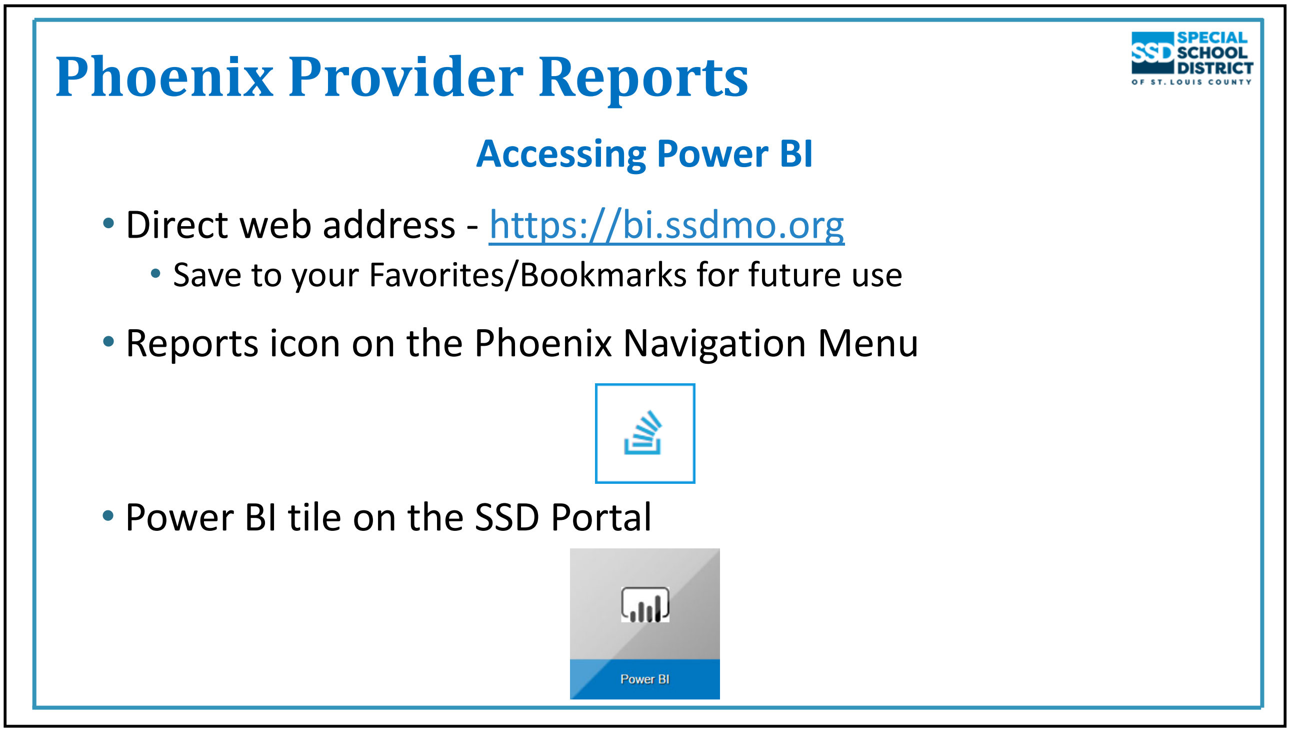
- Select the items to be reassigned to the same person
- Click the smile to assign all to you or the search icon to assign to someone else
- Save

Change Multiple Assignments

- Multiple events, services and goals can be assigned to the same person at the same time.
- Select the items you wish to reassign to the same person.
- In the Assign/Unassign section, on the Staff Editor, click the “X” to unassign all items, the smile to display your name or the Search icon to select the name of someone else. When the name is visible in the Staff Name field, Save.
- All selected items will be assigned to the person selected.

Phoenix Reports

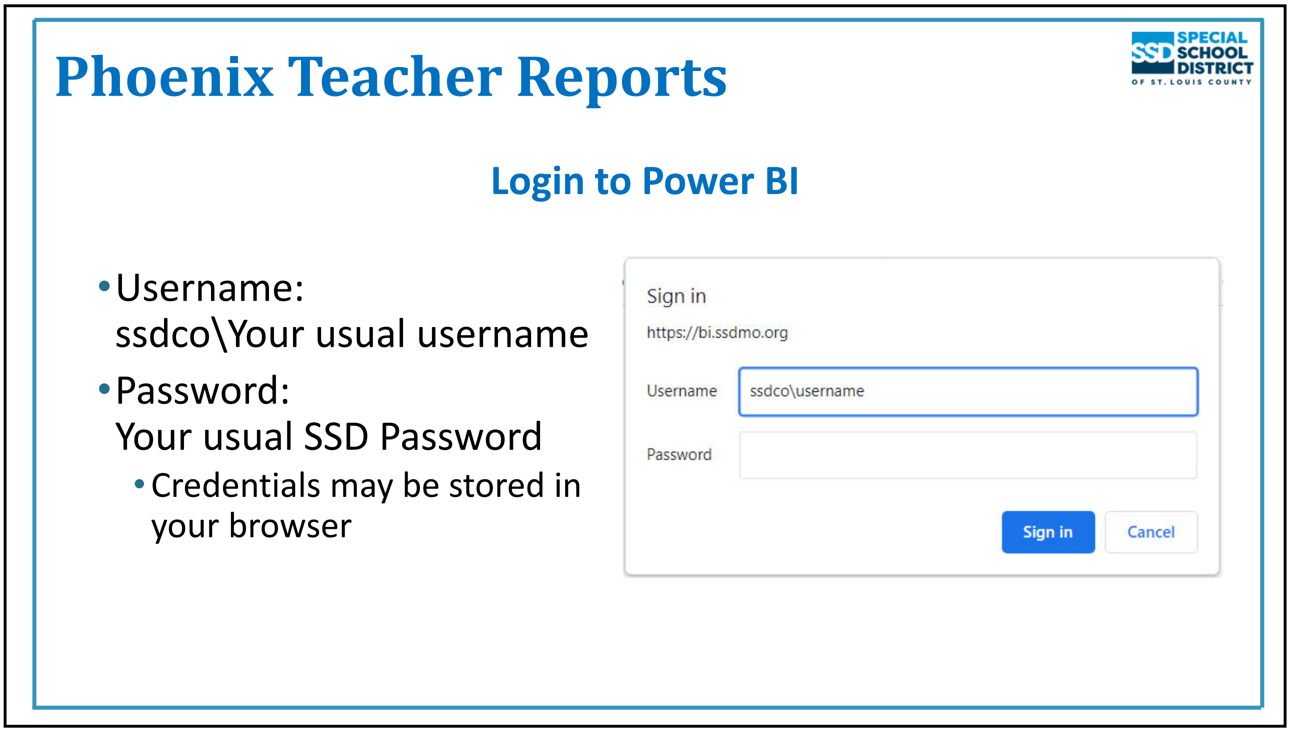
Information about Phoenix reports on Power BI can be found on the quick start card "Phoenix Reports-Provider"



Phoenix Teacher Reports

Phoenix Reports are accessed on Power BI. The site can be reached

- From the Power BI web address: https://bi.ssdmo.org
  - The web address can be saved in your favorites for quick access in the future.
- From Phoenix using the Reports icon on the Main Navigation Menu
- From the Power BI tile on the SSD Portal



Phoenix Teacher Reports

Login to Power BI

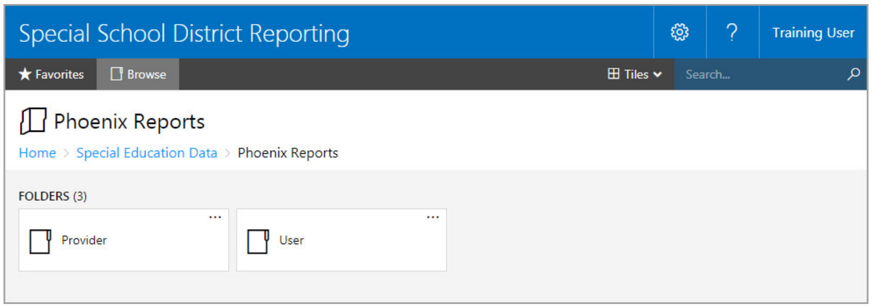
To login to Power BI:

- Enter your username in this format: ssdco\username using your regular username following the \
- Enter your SSD password
- Sign in

Your credentials may be stored in the browser, depending on browser settings. If so, you should only need to login again when you change your password.

Remember, if you are not using your own computer you should use a private browsing window so your credentials are not stored. Your credentials can also be removed by clearing the browser history.

Power BI

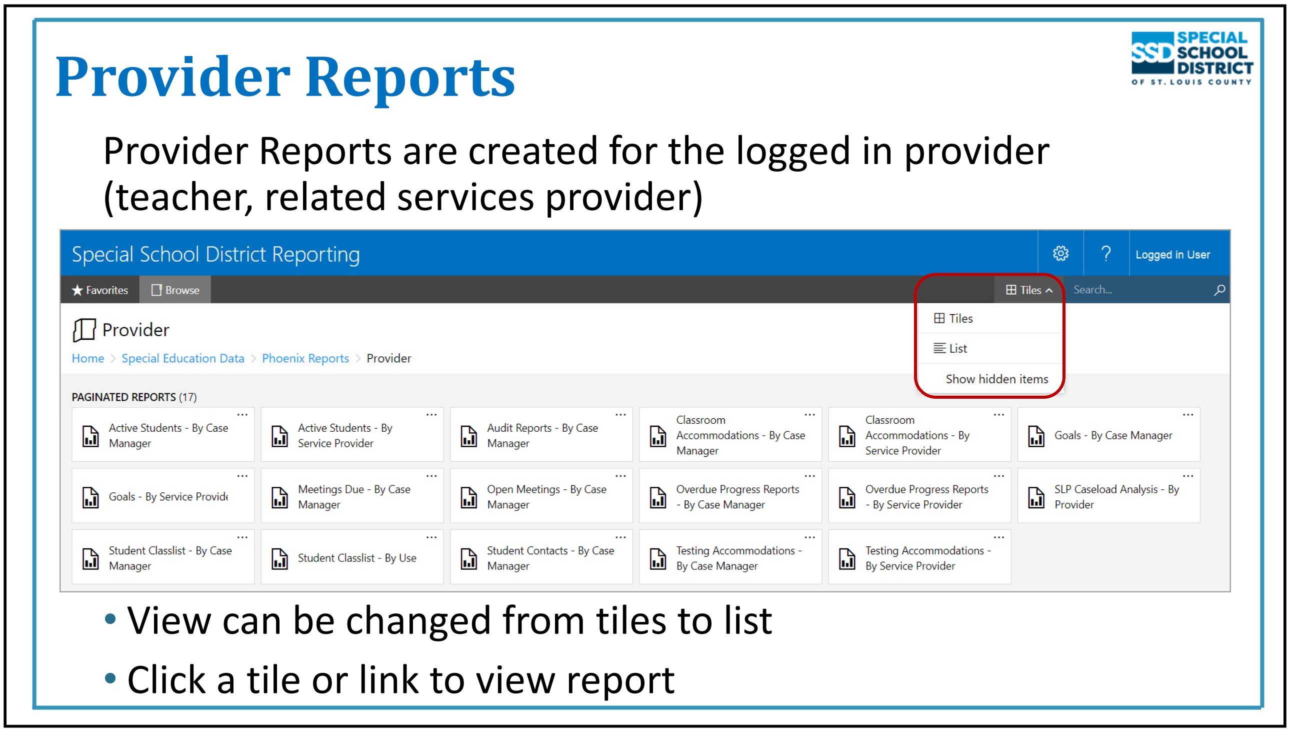


- Click tiles in this order:
  - Special Education Data
  - Phoenix Reports
  - Provider

Power BI

The first time you open Power BI you will be on the Home Page.

1. Select the tile for Special Education Data
   a. On the Special Education Data page you will see a series of KPIs (Key Performance Indicators) that display data for the district. This information is not for your caseload. It is for the entire district.
2. Select the tile for Phoenix Reports
3. Select the tile for Provider



Provider Reports

The group of Provider Reports displays as tiles. You can change the view to a list by selecting List from the drop down in the upper right.

Reports created "By Case Manager" include information about the students for whom you are assigned as Case Manager in Phoenix.

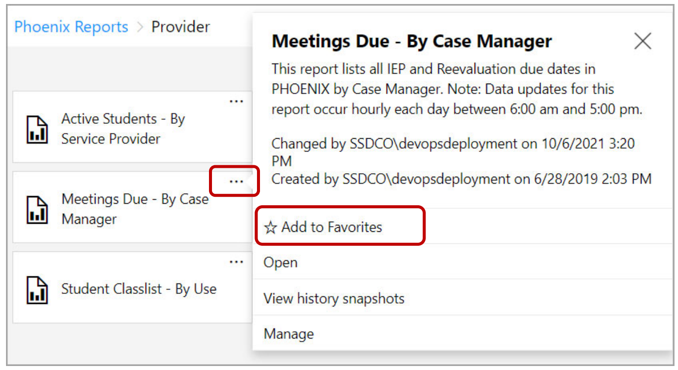
Reports created "By Service Provider" include students for whom you are assigned as a provider for a service. This can be helpful for related service providers.

To open a report, click the tile or link.

Add Reports to Favorites

Reports can be saved as a “Favorite” to provide quick access

- Click the ellipses for the report
- Select the star to **Add to Favorites**
- Click **Favorites** link to view saved Favorite reports



Add Reports to Favorites

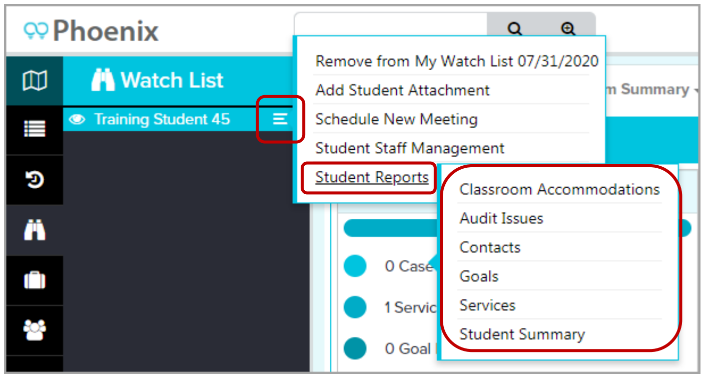
Reports can be saved as a "Favorite" which gives you quicker access to them when opening Power BI. When a report is a favorite it can be opened by selecting the Favorites link then clicking the report’s tile.

Any, or all, of the reports can be saved as a "Favorite".

1. Click the ellipses for the report on the tile or link
2. Select the star to Add to Favorites

When you open Power BI you can select the Favorites link at the top to view the list of your saved Favorite reports. This can save you steps each time.

View Student Reports



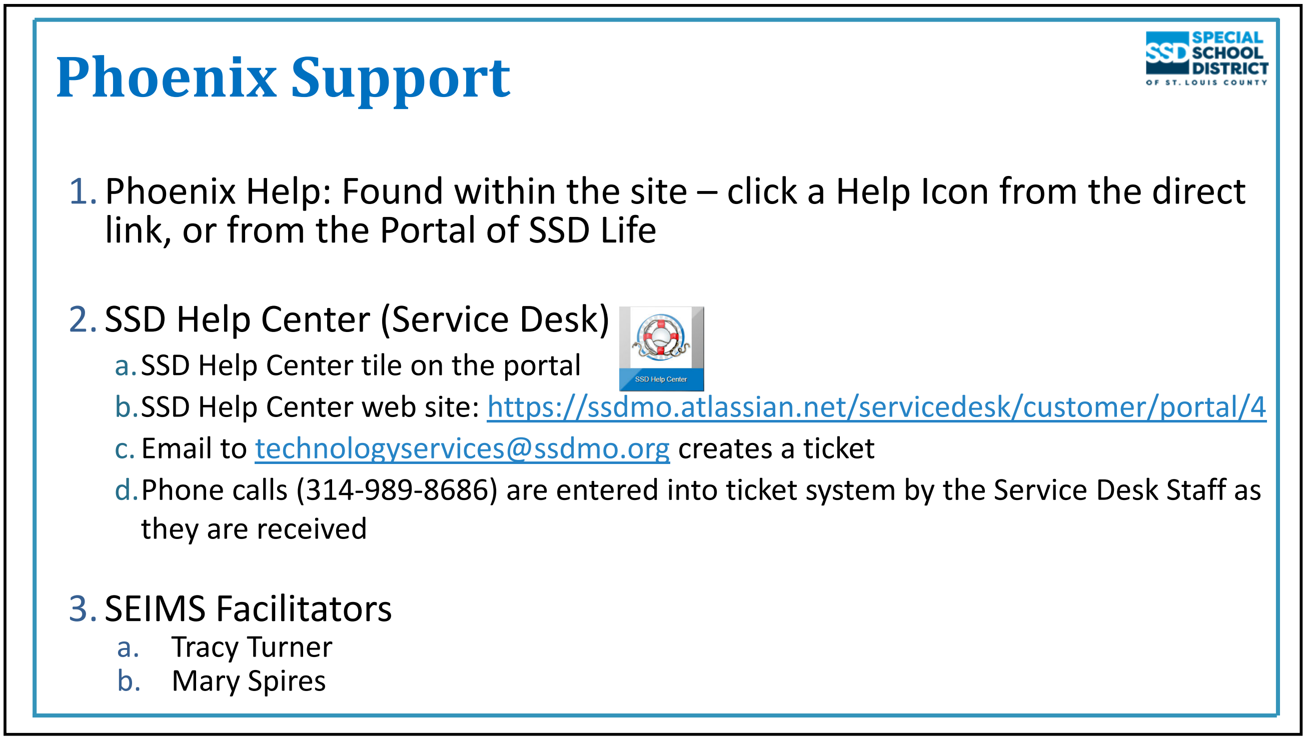
- Select the hamburger icon next to the student’s name
- Select Student Reports from the Student List Menu
- Select the Report you wish to view

Student Reports

Reports can also be viewed for an individual student. They are accessed from the Student Management Menu.

The hamburger icon appears when you hover over a student"s name on the Student List Panel. Selecting the icon displays the Student Management Menu which allows you to access information and perform tasks pertaining to the student. One of the options is Student Reports. When Student Reports is selected the report menu displays. These reports include information about this student only.

1. Hover over the student’s name
2. Select the hamburger icon
3. Select Student Reports
4. Select the report you wish to view
    a. Classroom Accommodations: a matrix including all classroom accommodations included on Form F in the student’s current IEP
    b. Audit Issues: Potential issues with the student’s record
    c. Contacts: Parent/Guardian contact information. This is the only place this information is accessible in Phoenix.
    d. Goals: List of all goals in the student’s current IEP including assigned Goal Responsible Staff
    e. Services: List of all services in the student’s current IEP including assigned Service Providers
    f. Student Summary: Basic information about the student



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 – tfturner@ssdmo.org
    - Mary Spires – 314-989-8558 – mspires@ssdmo.org