

Phoenix Basics

Logging into Phoenix

Using Google Chrome, Edge, Firefox or Safari enter the web address <https://phoenix.ssdmo.org>

Add the site to your bookmarks/favorites list and/or bar.

Log in using your SSD user name and password.




The Dashboard

The Dashboard opens. The Dashboard displays information about unassigned providers as well as meetings and progress reports due in the next 30 days or overdue. This information can be viewed for the students you Case Manage or are on your Caseload depending on the filter selected at the top of the screen. More information about the Dashboard will be provided during training.

Header Navigation

The Header Navigation Menu appears in the upper right of the screen and is always visible. This section will be covered in more detail during training but a few sections will be helpful immediately.



Icon	Name	Description
	Theme	The paintbrush icon opens the Theme Picker allowing you to select a new color for the program appearance.
	Reports	Phoenix Reports – opens Power BI, the SSD reports site. On this site you can view reports to help you organize your student information. The most useful reports to run prior to the start of school include <ul style="list-style-type: none">• Meetings Due-By Case Manager: IEP and Reevaluation Due Dates• Student Contacts-By Case Manager: Parent contact information• Classroom Accommodations-By Case Manager: matrix of student’s classroom accommodations which can be provided to classroom teachers Reports run “By Case Manager” include all students for which you have been assigned <i>in Phoenix</i> as Case Manager. See page 3 for instructions to update the Case Manager for your students.
	Help	Phoenix Help – opens the Home Page of the Phoenix Help Site. Select the Navigation tile to view links to pages with instructions for completing tasks in Phoenix such as changing providers. Select the Phoenix Reports tile for instructions for logging into Power BI and viewing reports in Phoenix.

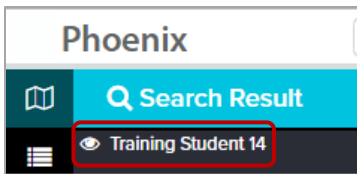
Searching for a Student

Enter the student’s SSD Student Number, MOSIS (State) ID, or last name in the search box. Click the **Search** icon (the magnifying glass) or press enter on your keyboard.









Student List Panel

The student’s name appears on the Student List Panel. Select the name to open the student’s profile.



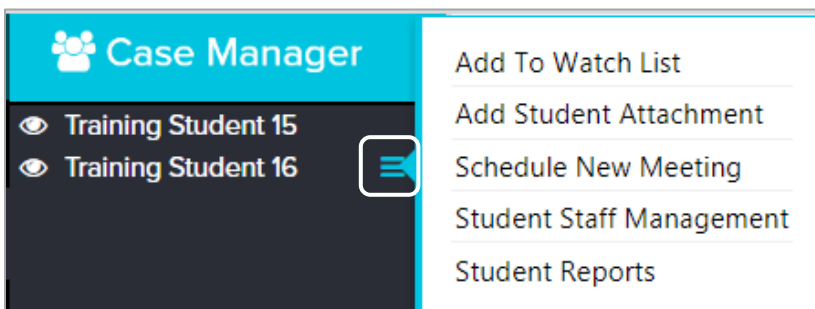
The Student List panel appears on the left of the screen. Lists can be viewed by selecting the appropriate icon.

Icon	Name	Description	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 user is assigned in Phoenix as Case Manager	System

Student Menu

The Student Menu is accessed by selecting the hamburger icon to the right of each student's name on the Student List panel. The icon becomes visible when hovering over a student's name.

Selecting the icon displays the menu.



The following options appear on the menu:

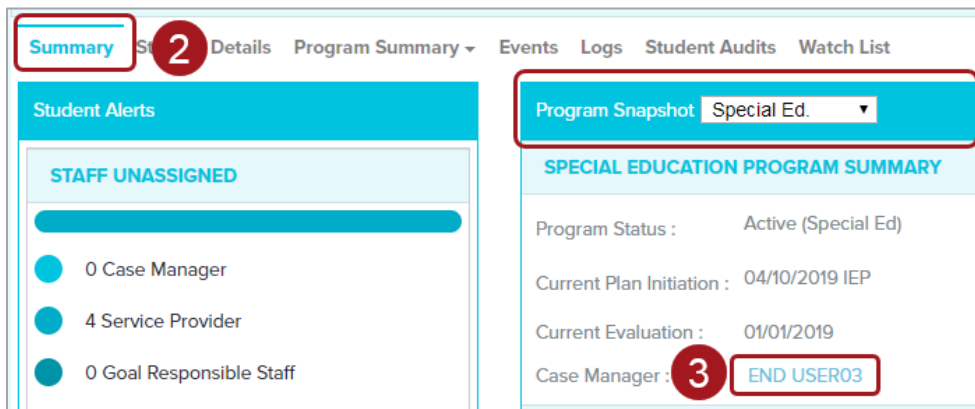
- **Add to Watch List:** When selected the student is added to the user's Watch List. If the student is on the user's Watch List the option changes to "Remove from My Watch List (Date)". The date indicates when the student will be removed from the Watch List. Watch Lists are cleared each year on 7/31.
- **Add Student Attachment:** Opens the Logs screen where attachments can be viewed and added to the student's record. Adding attachments is permissions based but all users can view attachments.
- **Schedule New Meeting:** Opens the Schedule Meeting window where a new event such as an IEP Amendment or Disciplinary Documentation can be added to the student's record.

- **Student Staff Management:** Can be used to change staff assignments for the student's Case Manager, Event Primary Staff, Service Providers, and Goal Responsible Staff.
- **Student Reports:** Displays another menu where reports for this student can be selected to be viewed. Available reports include
 - **Classroom Accommodations:** a matrix including all classroom accommodations from the student's current IEP
 - **Audit Issues:** Potential issues with the student's record
 - **Contacts:** Parent/Guardian contact information. This is the only place this information is accessible in Phoenix.
 - **Goals:** List of all goals in the student's current IEP including assigned Goal Responsible Staff
 - **Services:** List of all services in the student's current IEP including assigned Service Providers
 - **Student Summary:** Basic information about the student

Assigning Yourself as the Student's Case Manager

The student's Case Manager can be updated in several places in Phoenix. The fastest is on the Summary page of the Student Profile.

1. Select the student's name on the Student List panel to open the student's profile.
2. The **Summary** section opens.
3. On the **Program Snapshot** panel, select the name of the current **Case Manager**. The Staff Editor opens.



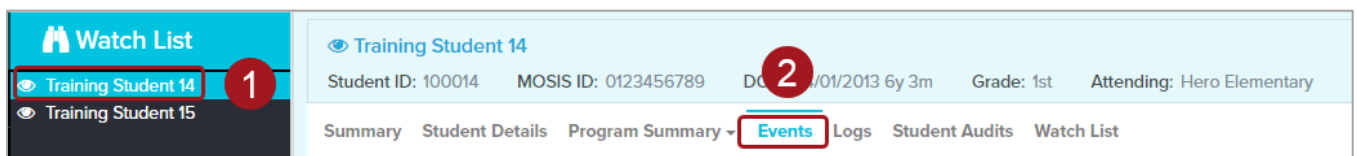
4. On the Staff Editor, select the **Smiley Face** icon to assign yourself.



Viewing/Printing Locked Events

To view and print the student's current IEP

1. Select the student's name on the Student List panel to open the student's profile.
2. Select the **Events** link.



3. On the Locked Events panel, locate the active plan. The Active Plan could be an Initial IEP, an Annual IEP, an IEP Amendment/Correction, an IEP Amendment, or an IEP Correction.

Event Type	Plan Status
Notification of Meeting - Annual IEP	
Annual IEP	ACTIVE

4. Select the **hamburger** icon to the left of the Active plan. A menu will display.

Event Type	Plan Status
Notification of Meeting - Annual IEP	
Annual IEP	ACTIVE

5. Select **View** then choose the option you wish to view. To view/print the entire IEP choose **Annual IEP**.

Event Type	Plan Status
Notification of Meeting - Annual IEP	
Annual IEP	ACTIVE

6. A PDF of the IEP will be created in a new window or download to the download location of your computer depending on your browser settings. Use the PDF controls to print if desired.

