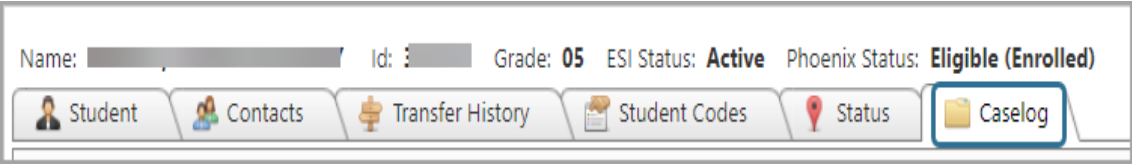
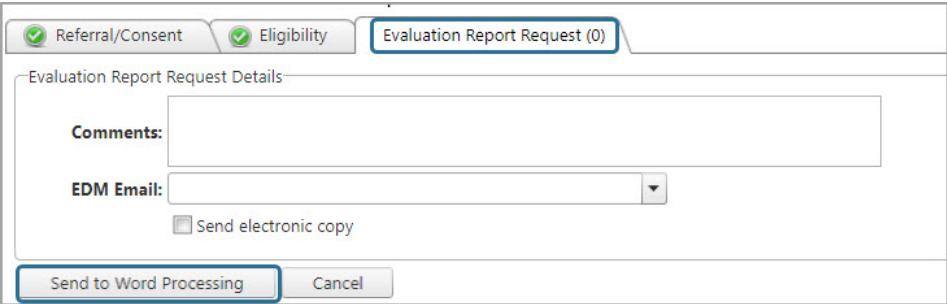
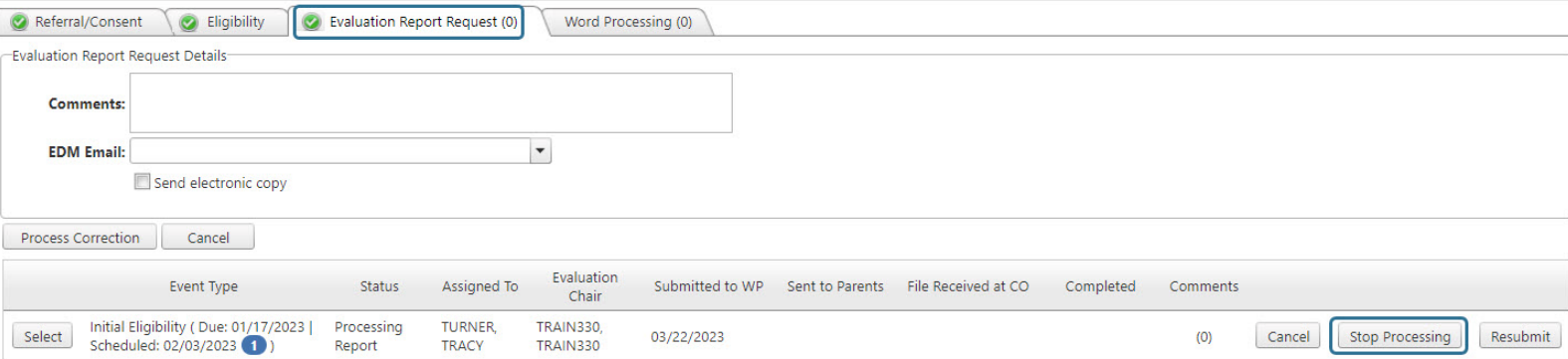
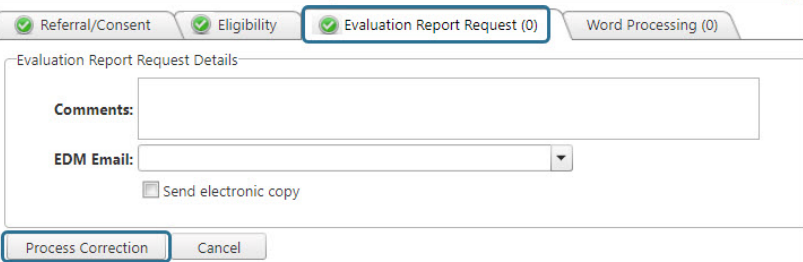


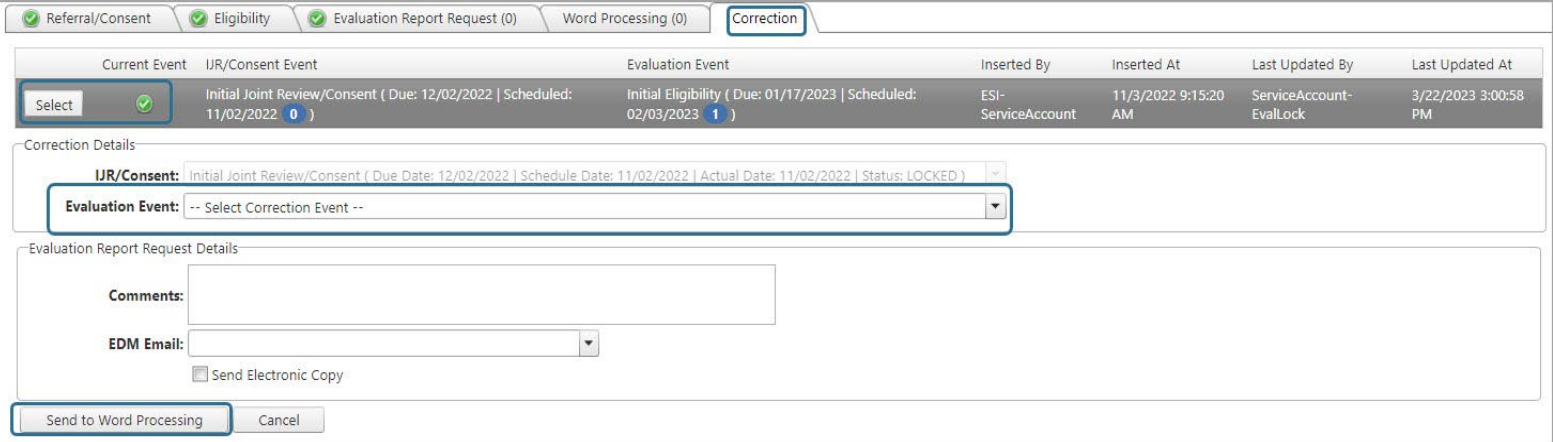
**Correction Process  
ESI Caselog Quick Steps**

Correction completed BEFORE the Report has been processed by Word Processor Event Process Status (in ESI) = Report Request Submitted or Processing Report		
Step	Task	Steps
1	Accessing Student's Caselog Record	<ol style="list-style-type: none"> <li>On the <b>Evaluation Chair Queue</b>, click the student's name to open the record   </li> <li>Click the <b>Caselog</b> tab</li> <li>Click the <b>Select</b> button on the Event Process grid next to the event being corrected (Initial Referral or Reevaluation)</li> </ol>
2	Submit Evaluation Report Request to Word Processing	<p>The Report Request must be submitted to Word Processing before creating the Correction event in Phoenix. <i>(The Event Process status in ESI must be Report Request Submitted or Processing Report. If status is Report Sent, Pending File &gt; #Days, File Received, File Not Received or Completed, follow the process beginning on page 4.)</i></p> <ol style="list-style-type: none"> <li>Check the Evaluation Chair Queue in ESI to ensure the assessment results have been attached and all metrics are accurate prior to locking the Initial Eligibility or Reevaluation event in Phoenix. If you have questions about why a particular metric is red (non-compliant), contact the Service Desk for assistance before locking the event.</li> <li>Lock the Initial Eligibility or Reevaluation event in Phoenix   </li> <li>Click <b>Evaluation Report Request</b> tab</li> <li>Enter any <b>Comments</b> needed to communicate with Word Processor</li> <li>If the report is to be sent to the parent electronically             <ol style="list-style-type: none"> <li>Select <b>EDM Email</b> address from drop-down (if no email appears, contact Intake (Initial Eligibility) or Student Data (Reevaluation) to have email address added then return to ESI to select email address)</li> <li>Check the box for <b>Send Electronic Copy</b></li> </ol> </li> <li>Click <b>Send to Word Processing</b></li> </ol>

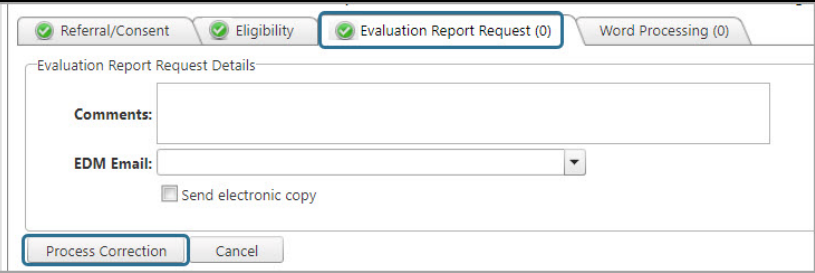
## Correction Process ESI Caselog Quick Steps

3	Notify Word Processing to stop processing report	<p>1. Click <b>Select</b> for event with status of Report Request Submitted or Processing Report</p>  <p>2. Click <b>Evaluation Report Request</b> tab</p> <p>3. Click <b>Stop Processing</b></p> <p>4. Click <b>OK</b> in confirmation window</p>
4	Complete/Lock Correction Event in Phoenix	<ol style="list-style-type: none"> <li>1. Create Correction event in Phoenix entering the date of the Eligibility Conference as both the Due Date and Scheduled Date</li> <li>2. Complete Correction event</li> <li>3. Attach assessment results if used</li> <li>4. Lock Correction Event</li> </ol>
5	Create Correction tab	 <ol style="list-style-type: none"> <li>1. Return to Caselog and click <b>Select</b> for the event on the Event Process grid with status of “Report Request Submitted” or “Processing Report”</li> <li>2. Click the <b>Evaluation Report Request</b> tab</li> <li>3. Click <b>Process Correction</b> button             <ol style="list-style-type: none"> <li>a. If you have created the correction event in Phoenix, click <b>OK</b> in confirmation. If you have not created the correction event in Phoenix, click <b>Cancel</b> and return to Phoenix to do so. Then return to ESI.</li> </ol> </li> <li>4. The Correction tab appears</li> </ol>

## Correction Process ESI Caselog Quick Steps

6	<p>Submit Correction to Word Processing</p>	<p><b>The Correction Event must be locked in Phoenix prior to completing this step.</b></p>  <ol style="list-style-type: none"> <li>1. Open student's record in ESI</li> <li>2. Click <b>Caselog</b> tab</li> <li>3. Click <b>Select</b> next to Current Event on the Event Process grid</li> <li>4. Click <b>Correction</b> tab</li> <li>5. Click <b>Select</b> next to the Current Event as indicated by the green checkmark</li> <li>6. Select the <b>Evaluation Event</b> being processed (i.e. Correction-Initial Eligibility or Correction-Reevaluation). <i>The event will only appear in the drop-down if it is locked in Phoenix.</i></li> <li>7. Enter any <b>Comments</b> needed to communicate with Word Processor</li> <li>8. If the report is to be sent to the parent electronically             <ol style="list-style-type: none"> <li>a. Select <b>EDM Email</b> address from drop-down (if no email appears, contact Intake (Initials) or the Student Data Secretary (Reevals) to have email address added then return to ESI to select email address)</li> <li>b. Select <b>Send Electronic Copy</b></li> </ol> </li> <li>9. Click <b>Send to Word Processing</b></li> </ol> <p><b>NOTE:</b> If the Correction tab is created in error contact the Service Desk for assistance.</p>
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**Correction Process  
ESI Caselog Quick Steps**

Correction completed AFTER the Report has been sent to the parent by Word Processor Event Process Status (in ESI) = Report Sent, Pending File > #Days, File Received, File Not Received or Completed		
Step	Task	Steps
1	Complete/Lock Correction Event in Phoenix	<ol style="list-style-type: none"> <li>1. Create Correction event in Phoenix entering the date of the Eligibility Conference as both the Due Date and the Scheduled Date</li> <li>2. Complete Correction event</li> <li>3. Attach assessment results</li> <li>4. Lock Correction Event</li> </ol>
		
2	Create Correction Tab	<p><b>NOTE:</b> If this is a correction of a previous Correction event, this step is not needed. The Correction tab is already available.</p> <ol style="list-style-type: none"> <li>1. Open the student’s record in ESI. If the student’s name no longer appears on the open cases of the Evaluation Chair Queue, choose “My Completed Cases –Current School Year” from the drop-down or search for the student</li> <li>2. Click the <b>Caselog</b> tab</li> <li>3. Click <b>Select</b> on the Event Process grid for the event being corrected</li> <li>4. Click the <b>Evaluation Report Request</b> tab</li> <li>5. Click <b>Process Correction</b> button</li> <li>6. If you created the correction event in Phoenix, click <b>OK</b> in confirmation.             <ol style="list-style-type: none"> <li>a. If you have not created the correction event in Phoenix, click <b>Cancel</b> and return to Phoenix to do so. Then return to ESI and start at the beginning of this step (2).</li> </ol> </li> <li>7. The Correction tab appears</li> </ol> <p><b>NOTE:</b> If the Correction tab is created in error contact the Service Desk for assistance.</p>

## Correction Process ESI Caselog Quick Steps

The Correction Event must be locked in Phoenix prior to completing this step.

Current Event	IJR/Consent Event	Evaluation Event	Inserted By	Inserted At	Last Updated By	Last Updated At
Select	Initial Joint Review/Consent ( Due: 12/02/2022   Scheduled: 11/02/2022 0 )	Initial Eligibility ( Due: 01/17/2023   Scheduled: 02/03/2023 1 )	ESI-ServiceAccount	11/3/2022 9:15:20 AM	ServiceAccount-EvalLock	3/22/2023 3:00:58 PM

Correction Details

IJR/Consent: Initial Joint Review/Consent ( Due Date: 12/02/2022 | Schedule Date: 11/02/2022 | Actual Date: 11/02/2022 | Status: LOCKED )

Evaluation Event: -- Select Correction Event --

Evaluation Report Request Details

Comments:

EDM Email:

Send Electronic Copy

3 Submit Correction to Word Processing

1. Open student's record in ESI
2. Click **Caselog** tab
3. Click **Select** next to Current Event on the Event Process grid
4. Click **Correction** tab
5. Click **Select** next to the Current Event as indicated by the green checkmark
6. Select the **Evaluation Event** being processed (i.e. Correction-Initial Eligibility or Correction-Reevaluation). *The event will only appear in the drop-down if it is locked in Phoenix.*
7. Enter any **Comments** needed to communicate with Word Processor
8. If the report is to be sent to the parent electronically
  - a. Select **EDM Email** address from drop-down (if no email appears, contact Intake (Initials) or the Student Data Secretary (Reevals) to have email address added then return to ESI to select email address)
  - b. Select **Send Electronic Copy**
9. Click **Send to Word Processing**