ProgressBook SpecialServices System Manager Guide



ProgressBook SpecialServices System Manager Guide
This document is current for v14.3.0 or later.
© 2014 Software Answers, Inc. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks or Service Marks of the companies with which they are associated. Software Answers, Inc. reserves the right at any time and without notice to change these materials or any of the functions, features or specifications of any of the software described herein.

Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook SpecialServices System Manager Guide* have been made.

Product Version	Heading	Page	Reason
14.3.0	"View Transfer History"	27	Added reference and screen shot to show optional step of selecting Include deleted and Include imported check boxes when viewing history of transfers into your district.
14.2.0	Entire Guide	N/A	Added links to demonstration videos.
14.2.0	"Run EMIS Review Report"	33	Updated screen shot to show additions to the EMIS Selection Form.
14.2.0	"EMIS Extract Error Messages"	45	Updated table to include new 504 Plan error message.
14.1.1	"EMIS Extract Error Messages"	45	Updated table to include IISP and RISP start and end date error messages.
14.1.1	"View EMIS Data Collection Form"	35	Updated screen shot to show availability of IISP and RISP start and end dates on the EMIS Data Collection Form.
14.1.1	"Edit EMIS Data Collection Form"	36	Updated screen shot to show availability of IISP and RISP start and end dates on the EMIS Data Collection Form.
14.1.0	"Run EMIS Review Report"	33	Updated screen shot to show additions to the EMIS Selection Form.
14.0.0	Entire Guide	N/A	Updated Service Plan references to Individual Service Plan.
14.0.0	"View EMIS Data Collection Form"	35	Updated screen shots to show new IISP and RISP lines on EMIS Data Collection Form.
14.0.0	"EMIS Extract Error Messages"	45	Updated table to include 504 Plan error messages. Updated section to include IISP and RISP events.
13.6.0	"Run EMIS Review Report"	33	Updated screen shot to show new AIEP check boxes on EMIS Review Report options.
13.5.0	"Edit EMIS Data Collection Form"	36	Updated screen shots and text to reflect new AIEP task information.
13.5.0	"EMIS Extract Error Messages"	45	Updated error message information to include AIEP tasks.
13.4.0	Entire Guide	N/A	Updated all screen shots to display the district label in the banner and the updated Logout option.
13.3.1	Entire Guide	N/A	Updated all screen shots to show the application quick launch icon in the banner for suite navigation.
13.3.1	"Administrator Home Page"	1	Added information about setting up district defaults and updated screen shot to show new Setup District Defaults option.

Change Log

Product Version	Heading	Page	Reason
13.3.1	"Set Up Progress Code Values"	19	Added new section explaining how to set up district defaults.
13.3.1	"Process EMIS Extract"	48	Corrected text to state that the location of the EMISOutput folder is specified in AppSettings.config.

Table of Contents

Change Log	i
About This Guide	1
Administrator Home Page	1
Set Up District Grade Levels	3
Associate Grade Levels	3
Set Up Security	5
Security Privileges	5
Security Roles	6
Assign Privileges to Roles	6
Remove Privileges from Roles	8
Assign Roles to Users	8
Set Up District Banks	11
Add Categories to District Banks	12
Delete Categories from District Banks	14
Add Items to District Bank Categories	14
Bank Codes	16
Edit Items in District Bank Categories	17
Delete Items in District Bank Categories	17
Set Up Progress Code Values	19
District-to-District Transfers	21
Select Students	21
Transfer Student Tasks to Another District	22
Import Student Tasks from Another District	24
View Transfer History	27
Transfer Activity Statuses	29
Delete Pending Transfer	29
EMIS Tools	31
EMIS Extract Records	31
How Tasks Are Selected by Date Range in EMIS	32

Run EMIS Review Report	33
View EMIS Data Collection Form	35
Edit EMIS Data Collection Form	36
Build EMIS Extract	38
Build EMIS Extract by District	38
Build EMIS Extract by Building	39
Build EMIS Extract by Student	40
View EMIS Extract and Error Log Files	42
File Naming Conventions	43
Save EMIS Extract and Error Log Files	44
Correct EMIS Errors	44
EMIS Extract Error Messages	45
Exclude Tasks from EMIS	48
Process EMIS Extract	48
Process EMIS Extract File Locally	49
Process EMIS Extract File Through ITC or Agency	50
View EMIS Transaction Log	51
Purge Activity from Transaction Log	52

About This Guide

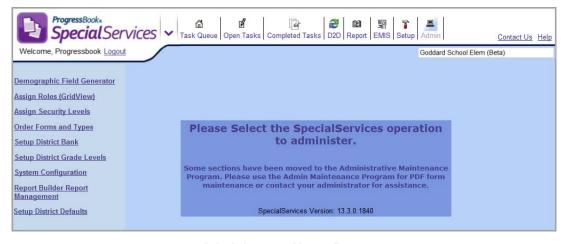
The purpose of this guide is to assist ProgressBook SpecialServices users with Master or School Administrator privileges in setting up and maintaining their SpecialServices system. The sections in this guide provide procedural information about setting up security, district banks, district grade levels (if your district has a standalone version of SpecialServices) and progress code values. Additionally, this guide provides the procedures for transferring student forms into and out of your district, building the EMIS Extract and running SpecialServices reports. For more specific information about how to use the application, refer to *ProgressBook SpecialServices User Guide*.

Administrator Home Page

For users assigned the School Administrator or Master roles in ProgressBook GradeBook, the Administrator Home Page is the first screen that displays when you access SpecialServices. On the Administrator Home Page, you can perform the following actions:

- Map district grade levels, if your district does not use ProgressBook GradeBook. See "Set Up District Grade Levels."
- Define security roles and assign the roles to the users who will access SpecialServices.
 See "Set Up Security."
- Set up District Banks. See "Set Up District Banks."
- Assign user account access to Report Builder reports; manage user accounts; manage district access to Report Builder reports; download and manage Core reports; and upload and manage Add-on reports. See *ProgressBook Report Builder Management Guide*.
- Set up progress code values. See "Set Up Progress Code Values."

Note: The Demographic Field Generator and Order Forms and Types links refer to functions that you cannot currently configure in SpecialServices.



Administrator Home Page

About This Guide

This page intentionally left blank.

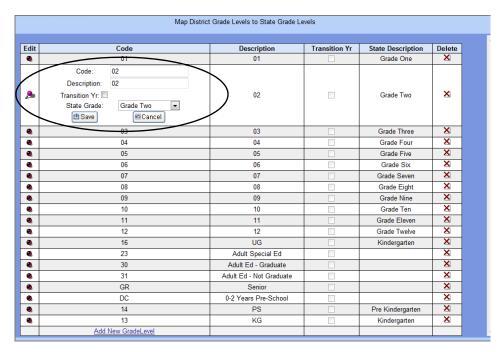
Set Up District Grade Levels

You may need to associate your district grade levels with the state grade levels to ensure the correct state grade levels are used for EMIS reporting. The district grade levels are imported into SpecialServices from your student information system during the nightly batch integration process.

Associate Grade Levels

- 1. On the Administrator Home Page, click **Setup District Grade Levels**.
- 2. On the Grade Levels screen, next to the grade level you want to map, click .

 The row expands to display the fields for the grade level.



Grade Levels Screen

3. In the **Code** field, if necessary, edit the code for the district grade level.

Note: You can use a two-digit numeric or two-character alphabetic reference that matches the grade level in the Code field. For example, you could enter a code of 01 for grade 1 and a code of KG for Kindergarten. The codes used in the Code and Description fields can be the same.

- 4. In the **Description** field, if necessary, edit the description of this grade level.
- 5. In the **State Grade** drop-down list, select the state grade level that you want to associate with the district grade level.

Set Up District Grade Levels

Note: The Transition Year refers to a student grade level that moves from one building to another building. This field is no longer used.

- 6. Click Save.
- 7. To continue associating state grade levels with district grade levels, repeat step 2 through step 6.

Note: To delete an existing grade level, click in the Delete column of the appropriate grade level. You cannot delete an existing grade level if any data is associated with it.

Set Up Security

SpecialServices defines seven roles that describe the type of access users can have within the application. To meet the specific requirements of your district, you can customize a role by adding privileges to or removing privileges from the default roles. Once you set up the roles, you must assign a role to all of the users whom you want to access SpecialServices. Users not assigned a role are unable to access the application.

Security Privileges

Security privileges define the specific actions a user can perform within a task as listed in the following table. For example, users assigned the Read and Archive privileges can view completed tasks, including their associated forms and archived forms. Users assigned the New and Edit privileges can access the Open Tasks screen and perform all of the available actions for an open task, including modifying the forms, except complete the task. The Finalize privilege allows a user to complete a task.

SpecialServices Security Privileges

Privilege	Description
Dood and Archive	Allows user to view completed tasks.
Read and Archive	Note: The Read and Archive privileges work in conjunction to each other; you must assign both privileges to a role in which you want to define view access to tasks.
New	Allows user to create new open tasks and add attachments.
Edit	Allows user to view and modify open tasks and rename completed tasks.
Finalize	Allows user to complete tasks.
Delete	Allows user to delete pages from an open task.
Comment	This privilege applies to a feature that is currently not available in SpecialServices.
Delete Finalized	Allows user to delete a completed task.
Access EMIS	Allows user to modify data on the EMIS Data Collection Form and generate the EMIS extract.
District Transfer	Allows user to send and receive SpecialServices forms between districts.
Admin Form Unlock	Allows user to unlock any page locked by another user.
Delete Open Task	Allows user to delete an open task.

Security Roles

Security roles, also called levels, contain one or many privileges to specifically define all of the actions a user has the ability to perform as listed in the following table. SpecialServices provides seven security roles: 100, 200, 300, 400, 450, 500 and 600. You can modify the roles to meet your district's requirements. However, it is recommended that you use the following guidelines:

- Levels 100 and 200 should define the most restrictive access, generally assigned to general education teachers.
- Level 300 should define privileges that allow users to perform primary task maintenance functions, such as creating new tasks, editing and completing tasks. This role is generally assigned to special education teachers and staff and, depending on the procedures in your district, may also include the ability to delete tasks.
- Level 400 should define the least restrictive access, generally assigned to special education administrators.
- Reserve levels 450, 500 and 600 to define special privileges that you can assign to users, such as Admin Form Unlock, Access EMIS and District Transfer.

The privileges are assigned to each role by default.

Security Privileges Assigned to Roles or Levels

Privilege	Level 100	Level 200	Level 300	Level 400	Level 450	Level 500	Level 600
Read	Х	Х	Х	Х			
Archive	Х	Х	Х	Х			
New			Х	Х			
Edit			Х	Х			
Finalize			Х	Х			
Delete				Х			
Comment		Х	Х	Х			
Delete Finalized							
Access EMIS						Х	
District Transfer							Х
Admin Form Unlock					Х		
Delete Open Tasks							

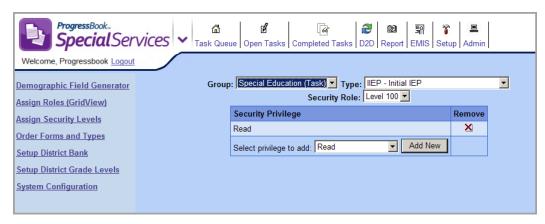
Assign Privileges to Roles

All of the current security settings for every task are associated with the IIEP - Initial IEP task type. The system does not currently recognize the privileges assigned to the other task types that appear in the **Type** drop-down list.

It is recommended that you only modify the existing roles to add Delete, Delete Open Tasks and Delete Finalize privileges.

1. On the Administrator Home Page, click **Assign Security Levels**.

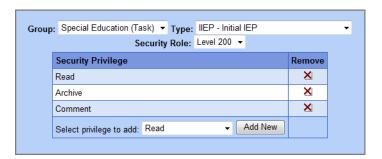
The Security Levels screen displays.



Security Levels Screen

- 2. In the **Type** drop-down list, select **IIEP Initial IEP**.
- 3. In the **Security Role** drop-down list, select the security role for which you want to assign privileges.

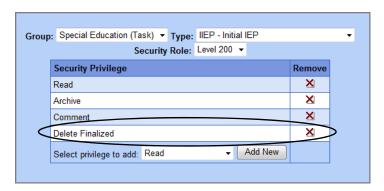
The current privileges assigned to the selected security role display in the grid.



Privileges Assigned to Security Role

4. In the **Select privilege to add** drop-down list, select the privilege you want to add, and then click **Add New**.

The new privilege is added to the list.



New Privilege Added to List

5. To add additional privileges to the security role, repeat step 3 and step 4.

Remove Privileges from Roles

- 1. On the Administrator Home Page, click Assign Security Levels.
- On the Security Levels screen, in the Type drop-down list, select IIEP Initial IEP.

Note: All of the current security settings are associated with the IIEP - Initial IEP task type. The system does not use the security privileges assigned to other task types.

- 3. In the **Security Role** drop-down list, select the security role for which you want to delete a privilege.
- 4. In the row of the privilege you want to remove, click X.
 The message displays, "Are you sure you want to delete this Privilege?"
- 5. Click OK.

The privilege is removed from the list of privileges assigned to the security role.

Assign Roles to Users

You must assign roles to define the activities to which a user has access in SpecialServices. You can assign multiple roles to a user; however, assign only one base role (100, 200, 300, 400) per user. For example, you might assign an administrative user the 400 base role as well as the 450 (Admin Unlock) and 600 (District Transfer) special roles. If you assign two base roles to a user, the role that grants the least restrictive privileges is applied.

Note: In order to access SpecialServices, you must assign a role to each user. Users without a role assigned to them are unable to access any of the screens in the application.

1. On the Administrator Home Page, click Assign Roles (GridView).

The Assign Security Roles screen displays, listing the name of each staff member with a user account in SpecialServices for the school selected by default in the **Select Building** drop-down list.



Assign Security Roles Screen

- 2. In the **Select Building** drop-down list, select the school for which you want to assign roles to the users.
- 3. In the row of the user whose security privileges you want to define, select the check box for each applicable role.
- 4. To save the assigned roles for the user, click **Submit Roles**.
- 5. Repeat step 3 and step 4 for each additional user for whom you want to define security roles.

Set Up Security

This page intentionally left blank.

Set Up District Banks

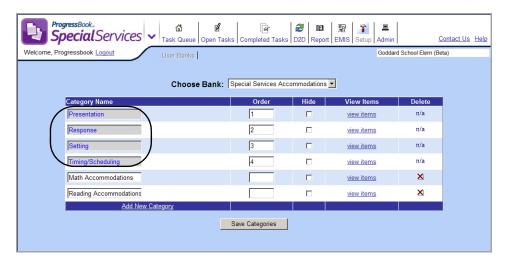
SpecialServices provides the Accommodations, Goals, Objectives and Present Levels banks in which users can store groups of phrases repeatedly used to complete information on the IEP 6 Measurable Annual Goals and IEP 12 Statewide and District Wide Testing pages of the Individualized Education Plan (IEP) form.

Each bank consists of the following pieces:

- Categories Describes the types of phrases you might use. For example, for the
 Objectives bank, you might have a category called Math under which you would create
 phrases (items) that describe the student's objectives or bench marks for achieving a
 particular goal.
- Items Defines the phrase you would use on the IEP. For example, in the Math category
 in the Objectives bank, you might have an item that states a specific bench mark or
 objective, such as "The student will identify/name/state value for coins."

The District Banks contain categories and items that appear by default in the banks for all users at a specified school. Users who are not assigned the School Administrator or Master roles in ProgressBook GradeBook cannot modify or delete the items in the District Banks. However, all users can create and maintain their own categories and items in User Banks. For more information about User Banks, see "Set up User Banks" in *ProgressBook SpecialServices User Guide*.

"District-Defined Categories on User Bank Setup Screen" shows how the categories created in the District Banks display from the User Banks Setup screen. All users can use the items in the District Bank on their IEP forms.



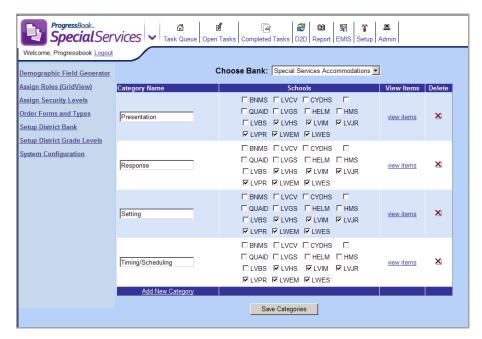
District-Defined Categories on User Bank Setup Screen

Add Categories to District Banks

You can add categories to the Accommodations, Goals, Objectives and Present Levels banks. Once you create a new category, you can enter for that category those phrases—called items—used to complete the corresponding section on the IEP form.

1. On the Administrator Home Page, click **Setup District Bank**.

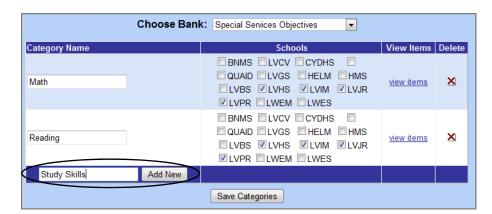
The District Bank Setup screen displays with the categories for the SpecialServices Accommodations selected by default.



District Bank Setup Screen

- 2. In the **Choose Bank** drop-down list, select the appropriate bank to edit:
 - **Special Services Accommodations** Used in the Detail of Accommodations sections of IEP 12 Statewide and District Testing.
 - Special Services Goals Used in the Measurable Annual Goal section of IEP 6
 Measurable Annual Goals.
 - Special Services Objectives Used in the Benchmarks/Objectives sections of IEP 6 Measurable Annual Goals.
 - Special Services Present Levels Used in the Present Levels of Performance section of IEP 6 Measurable Annual Goals.
- At the bottom of the Categories grid, click Add New Category.

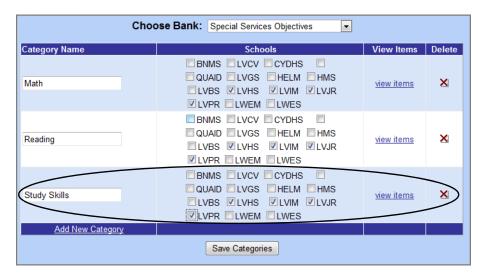
A blank **Category Name** field appears at the bottom of the Categories grid.



Category Name Field for New Category

- 4. In the Category Name field, enter a name for the new category.
- 5. Click Add New.

The new category displays in the Categories grid in alphabetical order by the category name. The **Schools**, **View Items** and **Delete** columns become available for the category.



New Category in Categories Grid

6. In the **Schools** column, select the schools for which you want the category to display.

Note: When editing the appropriate sections of an IEP, the category only appears for users who have access to the schools you select in the Schools column.

- 7. Click Save Categories.
- 8. Once you create a category, enter the items you want to store for the category. See "Add Items to District Bank Categories."

Delete Categories from District Banks

You can delete the district categories from the Accommodations, Goals, Objectives and Present Levels banks.

Note: When you delete a category, all of the items associated to the category are also deleted. This does not affect the items already imported onto existing forms.

- 1. On the District Bank Setup screen, in the **Choose Bank** drop-down list, select the appropriate bank.
- 2. In the **Schools** column, deselect any schools to which the category is associated.
- 3. In the row of the category you want to delete, click ☒ .

 The message displays, "Are you sure you want to delete this category? This will permanently delete all of the items and user settings associated with this category."
- 4. To confirm the deletion, click **OK**.

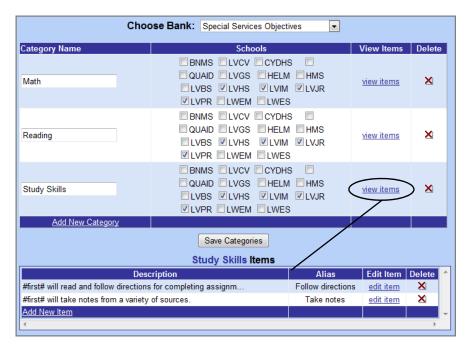
The category no longer displays in the Categories grid. Any items associated with the category are also deleted.

Add Items to District Bank Categories

For each district category, you must create items to define the phrases users would select to complete the Accommodations, Goals, Objectives and Present Levels sections of an IEP form. The items you enter for a category can be viewed and imported into the IEP form by the users in the selected schools.

- 1. On the District Bank Setup screen, in the **Choose Bank** drop-down list, select the appropriate bank.
- 2. In the row of the category to which you want to add a new item, click view items.

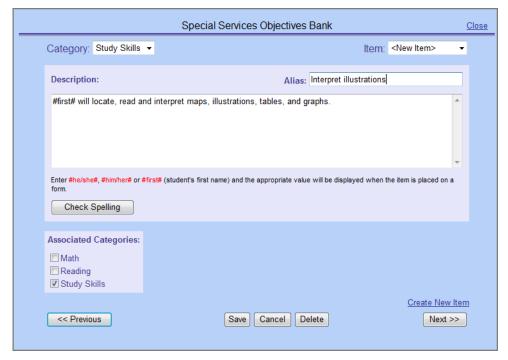
The Items grid appears below the Categories grid and displays the items, if any, associated with the category.



Items for a Category on District Banks Setup Screen

3. Click Add New Item.

The Item window for the category displays.



Item Window

4. In the **Alias** field, enter a short description for the new item.

Note: The alias displays in the Items list on the Import Bank screen when you are adding the items to the IEP form. If you leave this field blank, the system displays the text in the Description field. You would use the Alias field to distinguish an item if several of the items for this category begin similarly.

5. In the **Description** field, enter the specific phrase you would use for this category and bank.

Note: SpecialServices provides codes you can use in the Description field, which will insert the student's name or the appropriate pronoun in the phrase when you import it on an IEP form. See "Bank Codes."

- 6. You can perform either of the following optional steps while creating the new item:
 - To check the spelling for the phrase you entered in the **Description** field, click **Check** Spelling.
 - To associate this item to more than one category, in the Assorted Categories area, select the applicable categories.
- 7. Click Save.
- 8. To create another item, click **Create New Item**, and then repeat step 4 through step 7.
- 9. When you are done creating new items, to return to the District Bank Setup screen, click **Close**.
- 10. To view the items you created, for the category in which you created the items, click **view items**.

Bank Codes

Use the codes listed in the following table to create phrases for items. When the item is added to an IEP form, the student's name or the appropriate pronoun is inserted in the position of the code.

Code	Description	Example
		#first# will make accurate measurements using appropriate tools and technology.
#first#	Inserts student's first name.	Sandra will make accurate measurements using appropriate tools and technology.
#he/she#	Inserts a lowercase "he" or "she" as appropriate for the student.	When #he/she# is evidencing stress, #first# will initiate appropriate interactions without modeling or prompts. When she is evidencing stress, Sandra will initiate appropriate interactions without modeling or prompts.
#He/She#	Inserts a mixed case "He" or "She" as appropriate for the student.	#He/She# will make accurate measurements using appropriate tools and technology. She will make accurate measurements using appropriate tools and technology.
#him/her#	Inserts a lowercase "him" or "her" as appropriate for the student.	#first# is able to answer direct questions when they are signed and spoken to #him/her#. Sandra is able to answer direct questions when they are signed and spoken to her.
#Him/Her#	Inserts a mixed case "Him" or "Her" as appropriate for the student.	N/A

Code	Description	Example
#his/hers#	Inserts a lowercase "his" or "hers" as appropriate for the student.	#first# will identify which work area is #his/hers# . Sandra will identify which work area is hers .
#His/Hers#	Inserts a mixed case "His" or "Hers" as appropriate for the student.	N/A
#his/her#	Inserts a lowercase "his" or "her" as appropriate for the student.	#first# will alphabetize #his/her# spelling/vocabulary words with 80% accuracy. Sandra will alphabetize her spelling/vocabulary words with 80% accuracy.
#His/Her#	Inserts a mixed case "His" or "Her" as appropriate for the student.	#His/Her# regular classroom teacher will notify the special education teacher of any behavioral issues. Her regular classroom teacher will notify the special education teacher of any behavior issues.

Edit Items in District Bank Categories

- 1. On the District Banks Setup screen, in the **Choose Bank** drop-down list, select the appropriate bank.
- 2. In the row for the category in which you want to edit an item, click **view items**.
 - The Items grid appears below the Categories grid and displays the items associated with the category.
- 3. In the row of the item you want to edit, click **edit item**.
- 4. On the Items window, you can perform any of the following actions:
 - Modify the information in the Alias and Description fields.
 - To associate the item to additional categories, in the Associated Categories area, select the check box for the appropriate categories.
 - To delete the item, click **Delete**.
 - To enter a new item, click Create New Item, and then complete the fields on the Items window.
- 5. To store any changes you made to the current item, click **Save**.
- 6. If you want to navigate to the other items associated to the selected category, click **Previous** or **Next** as appropriate.
- 7. To return to the District Bank Setup screen, click **Close**.

Delete Items in District Bank Categories

Note: Deleting an item does not remove the item from the forms on which it was already imported.

- 1. On the District Bank Setup screen, in the **Choose Bank** drop-down list, select the appropriate bank.
- 2. In the row for the category in which you want to edit an item, click **view items**.
 - The Items grid appears below the Categories grid and displays the items associated to category.

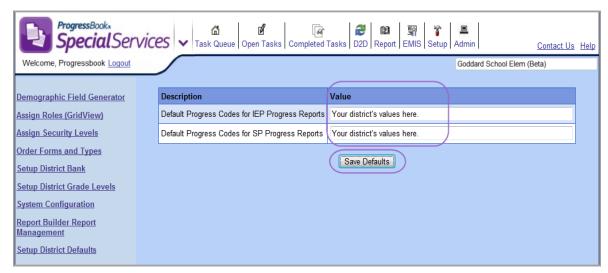
- 3. In the row of the item you want to delete, click ☒ .

 The message displays, "Are you sure you want to delete this Item?"
- To confirm the deletion, click **OK**.
 The item is removed from the Items grid.

Set Up Progress Code Values

You can create default progress code text that appears on IEP Progress Reports and Individual Service Plan Progress Reports. The default information you choose to display serves as a legend or key to aid teachers in selecting the progress codes required by your district.

- 1. On the Administrator Home Page, click **Setup District Defaults**.
- 2. On the district defaults screen, in the **Value** column, enter the default progress code text for each type of progress report.



District Defaults Screen

3. Click Save Defaults.

The "Save Successful!" message displays.

Note: The default values populate the last line of the Measurable Objectives or Benchmarks section or the Measurable Annual Goals section of the associated progress report.

IEP Individualized Education Program PROGRESS REPORT	Freund Local School District Jack D'Souza
PARENT: This form is used to report on your child's progress on the goals and objectives listed on his/her contact your child's special education teacher.	IEP. Should you have any questions, please do not hesitate to
CHILD'S INFORMATION	00010145
NAME: Jack D'Souza ID NUMBER: 9: IEP EFFECTIVE DATES: -	99049145 GRADE LEVEL: 02 ▼ / 02 ▼
MEASURABLE ANNUAL GOAL	
GOAL NUMBER:	
AREA:	
BUILDING: Lake V	View Elementary School
HOMEROOM TEAC	
SPECIAL ED TEAC RELATED SERVICE	
MEASURABLE OBJECTIVES or BENCHMARKS STU	JDENT PROGRESS
NUM OBJECTIVE or BENCHMARK	
1 .1	
2	
.3	
.4	
.5	
Your district's values here.	
COMMENTS (Including summary of the measurable data utilized to assess progress and a description of child's progre	ess toward meeting the goal in measurable terms)

Progress Report Showing District Default Values

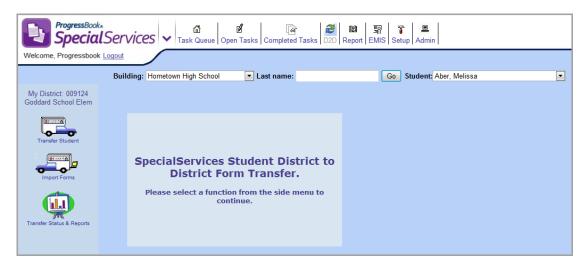
Note: When creating a progress report as a new task, users can change or delete the default values. When creating a progress report from an existing task, the progress code values are copied from the previous task.

District-to-District Transfers

District-to-District Transfer enables you to transfer a student's tasks from your district to another district, import a student's tasks into your district, review transfer history and delete a pending transfer. When you transfer a task, all of the forms and attachments within the task are also transferred.

You can only use the District-to-District Transfer option if the district to which you are transferring the task or from which you are importing the task also uses ProgressBook SpecialServices.

Only users with the District Transfer privilege assigned to their role can access this screen.



District-to-District Transfer Screen

Select Students

On the District-to-District Transfer screen, the search fields available for locating the student for whom you want to transfer task(s) vary depending on the level of access assigned to your user account.

If you can only view those students in your assigned classes, the **Class** drop-down list displays, as shown in the following image. Select a class to populate the **Student** drop-down list with those students who are assigned to the class. You can then select the student for whom you want to transfer tasks.



Class List on District-to-District Transfer Screen

If you can view students in one or multiple schools and you have no classes assigned to you, the **Building** drop-down list displays. You can perform the following steps to select the student:

- 1. In the **Building** drop-down list, select a school.
 - The **Students** drop-down list populates with those students who are assigned to the selected school.
- 2. To further narrow your search, in the **Last Name** field, enter all or part of the student's last name, and then click **Go**.
 - The **Student** drop-down list populates with only the students whose last name matches or most closely matches the criteria entered in the **Last Name** field.
- 3. Select the student for whom you want to transfer or import forms.



Building List and Last Name Search Field on District-to-District Transfer Screen

Transfer Student Tasks to Another District

To view a video of this procedure, go to: http://www.progressbook.com/Videos/SpS/Transfer-Tasks

You can transmit the tasks for a student who has transferred from your district to another district that also uses ProgressBook SpecialServices.

- 1. On the banner, click **D2D** $otin{goldsystem}$
- 2. On the District-to-District Transfer screen, click **Transfer Student**.
 - The **Select Forms** step of the Transfer Student Forms screen displays.
- 3. Select the student whose task you want to transfer. See "Select Students."

The tasks available to be transferred for the student display. Only Classic View and Task View form set types are available for transfer. SSEM archived form set types are not available to be transferred.



Select Tasks to Transfer

4. In the row of each task you want to transfer to another district, select the check box, and then click **Select>>**.

The tasks you selected to transfer appear in a grid on the right side of the screen.



Tasks Selected to Transfer

Note: To remove a task from the grid on the right side of the screen, in the appropriate row, select the check box, and then click << **Remove**. The task displays in the grid on the left side of the screen.

5. Once all the tasks you want to transfer are selected, click **Next**.

The **Choose District** step of the Transfer Student forms screen displays.

6. To locate the district to which you want to transfer the tasks, in the **Enter search criteria** field, enter all or part of the identifying information.

The results of the search display below the **Enter search criteria** field.

Note: You can search for the district by entering all or part of the district's name, address, city or state identification number (IRN).



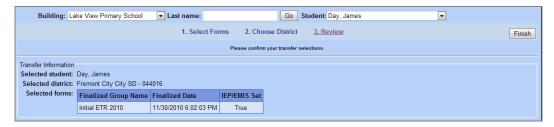
Search Results for District

7. In the search result grid, in the row of the district to which you want to transfer the student's tasks, click .

The row becomes highlighted to indicate that you have selected it.

8. Click Next.

The **Review** step of the Transfer Student Forms screen displays.



Review Step of Transfer Student Forms Screen

- Verify that the correct student, tasks and district are selected. To make any changes to the selected options, click the link for the step to which you would like to return, and modify the options as necessary.
- 10. To process the transfer, click **Finish**.

The transfer may take a few moments depending on the speed of your Internet connection. When the transfer process is complete, the following message displays, "Your transfer has been sent!"

Import Student Tasks from Another District

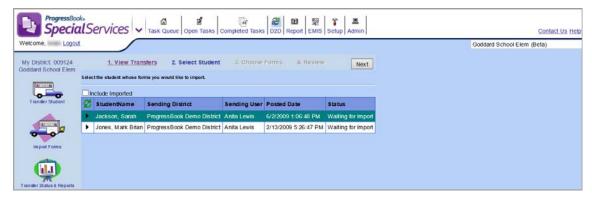
To view a video of this procedure, go to: http://www.progressbook.com/Videos/SpS/Import-Tasks

Administrators at other districts who use ProgressBook SpecialServices can transfer the tasks for a student who has transferred to your district. You can then import these tasks and store them as part of the student's information in SpecialServices. Once the task has been transferred into your district, you can view it from the Completed Tasks screen.

Note: The information from the imported forms does not appear on the EMIS extract. To use any of the information on valid forms for the current year, you must create a new task from the imported task or create a new page within a task using a page from the imported task.

- 1. On the banner, click **D2D 2**.
- 2. On the District-to-District Transfer screen, click **Import Forms**.

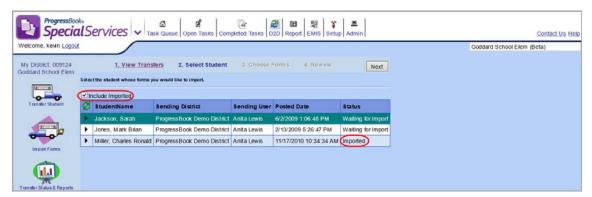
The **View Transfers** step of the Import Student Selection screen displays, listing the names of students whose tasks have been transferred from another district.



View Transfers Step of Import Student Selection Screen

3. Optional: To include students for whom you have already imported tasks, select the **Include Imported** check box at the top of the table.

An updated list displays.

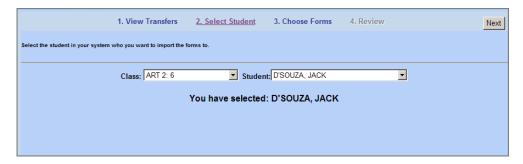


View Students with Imported Tasks on Import Student Selection Screen

- 4. In the row of the student whose tasks you want to import into SpecialServices, click .

 The row is highlighted to indicate that you have selected it.
- 5. Click Next.

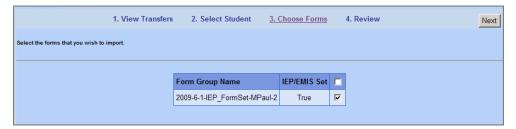
The **Select Student** step of the Import Student Forms screen displays. The student whose name matches the name associated to the task you are importing is selected by default.



Select Student Step of Import Student Forms Screen

- 6. Verify that the student to whom you want to import the task displays in the **Student** drop-down list. If it does not, select the appropriate student.
- 7. Click Next.

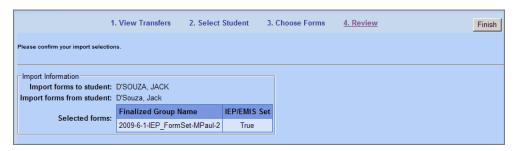
The **Choose Forms** step of the Import Student Forms screen displays, listing the forms available to import for the student selected in step 4.



Choose Forms Step of Import Student Forms Screen

- 8. In the row of the forms or task you want to import, select the check box.
- 9. Click Next.

The **Review** step of the Import Student Forms screen displays.



Review Step of Import Student Forms Screen

- 10. Verify that the correct information is selected in the **Import forms to student**, **Import forms from student** and **Selected forms** fields. To change any of the selected options, click the link of the step to which you would like to return, and modify the options as necessary.
- 11. To import the selected task, click Finish.

Once the tasks are imported into your district, the message displays, "The forms have been imported!"

- 12. You can perform any of the following actions:
 - View the imported task. See "Completed Tasks" in ProgressBook SpecialServices User Guide.
 - Create a new task using the task you imported. See "Create New Tasks from Existing Tasks" in ProgressBook SpecialServices User Guide.
 - Create a new page in an existing task using a page from the task you imported. See "Create New Pages from Existing Pages" in *ProgressBook SpecialServices User Guide*.

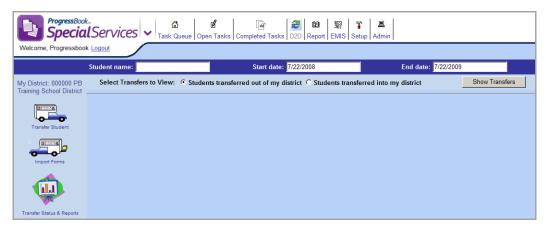
View Transfer History

To view a video of this procedure, go to: http://www.progressbook.com/Videos/SpS/Transfer-History

You can view the transfer history of the student task imported into or transferred out of your district.

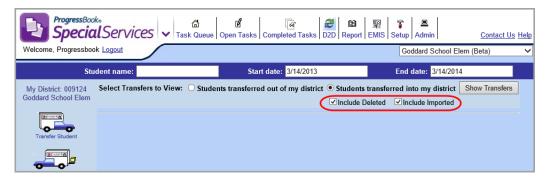
- 1. On the banner, click **D2D**

 .
- On the District-to-District Transfer screen, click Transfer Status & Reports.
 The Transfer History screen displays.



Transfer History Screen

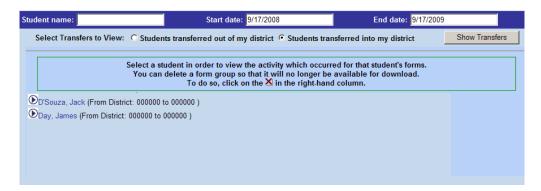
- 3. Search for the transfer history records you want to view using one or both of the following methods:
 - In the **Student name** field, enter the student's name.
 - In the **Start date** and **End date** fields, enter the begin and end dates within which the transfer occurred.
- Select one of the Select Transfers to View options.
 - Students transferred out of my district Lists the students for whom tasks have been sent to another district.
 - Students transferred into my district Lists the students whose tasks have been imported into your district. You can optionally select the **Include Deleted** and/or **Include Imported** check boxes to include deleted and/or imported student transfer records in your results.



Include Deleted and Imported Transfer Records

5. Click Show Transfers.

The transfer history records that meet the criteria you selected display.

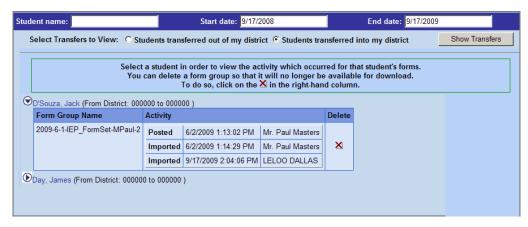


Transfer History Records For Entered Criteria

6. To view the details of the transfer history, in the row of the student for whom you want to view the transfer history, click **•** .

The following information about the transfer activity displays below the student name.

- The name of the task transferred.
- The date and time the activity occurred.
- The user who performed the transfer activity.
- The status of the activity.



Transfer History Details

Transfer Activity Statuses

The following table describes the activity statuses that appear in the transfer history details for a student.

Transfer Activity Status

Activity Status	Description
Posted	The forms have been posted to the destination district. • For students transferred into your district, you can import forms that appear as Posted. • For students transferred out of your district, Posted indicates that the forms are available for the administrator at the destination district to import.
Imported	The forms have been imported into SpecialServices.
Deleted	The forms have been deleted and are not available for import into SpecialServices.

Delete Pending Transfer

To view a video of this procedure, go to: http://www.progressbook.com/Videos/SpS/Delete-Transfer

You can delete any tasks mistakenly sent into your district or transferred out of your district from the Transfer Students Forms screen.

- 1. On the District-to-District Transfer screen, click **Transfer Status & Reports**.
- 2. On the Transfer History screen, search for the transfer history records you want to delete using one or both of the following methods.
 - In the Student name field, enter the student's name.
 - In the **Start date** and **End date** fields, enter the begin and end dates within which the transfer occurred.
- 3. Select one of the **Select Transfers to View** options:
 - Students transferred out of my district Lists the students for whom tasks have been sent to another district.

- **Students transferred into my district** Lists the students whose tasks have been transferred into your district.
- 4. Click Show Transfers.

The transfer history records that meet the criteria you entered display.

- 5. In the row of the student whose transfer transaction you want to delete, click **.** The transfer history information displays below the student's name.
- 6. In the row of the transfer transaction you want to delete, click Ϫ.

In the row of the form set you deleted, a "Deleted" activity type line displays in the **Activity** column with the date and time and name of the user who deleted the transfer information. You no longer have the ability to delete the transfer transaction.

The task no longer displays on the Transfer Student Forms or Import Student Forms screen, depending on the option you selected in step 3.

EMIS Tools

Completed IEP, ETR and ISP tasks in SpecialServices contain information required for reporting to Ohio's Education Management Information System (EMIS). EMIS tools in SpecialServices provide the ability to extract the information from these tasks to a file—the EMIS Extract—and save it to a local or network location from which you can then import it into your student information system for further processing and final submission to EMIS.

To assist you in validating that the correct information appears in the EMIS Extract, you can run the EMIS Review Report, which lists those students whose tasks contain information reportable to EMIS. The EMIS Review Report also allows you to view or edit, depending on your security privileges, the EMIS Data Collection Form. See "Run EMIS Review Report."

All IEP, ETR and ISP tasks are included in the EMIS Extract by default. You can choose to exclude specific tasks, if necessary. See "Exclude Tasks from EMIS."

EMIS Extract Records

The EMIS Extract contains only the information from selected tasks recorded in SpecialServices; it does not contain all of the records or data elements required by EMIS. To complete the information required by EMIS, you must import the EMIS Extract into your student information system.

The following records are generated when you build the EMIS Extract:

- Student Attributes Effective Date Record (FD) Reports a change in the student's disability information.
- Student Special Education Record (GE) Reports each event for which information is completed on the Special Education Events Form for students with a disability or students suspected to have a disability.
- **Student Program Record (GQ)** Reports each service/program code selected in the IEP 7 Specially Designed Services page of a student's IEP.
- Student Assessment Record (FA) Reports each assessment code selected for the Kindergarten Readiness Assessment Literacy, Student Ohio Achievement Assessment and Student Ohio Graduation Test on the IEP 12 or SP 3 Statewide and District Wide Testing pages of a student's IEP or ISP.
- Student Special Education Graduation Requirement Record (FE) Reports each
 assessment code selected for the Student Ohio Graduation Test on the IEP 12 or SP 3
 Statewide and District Wide Testing pages of a student's IEP or ISP.

How Tasks Are Selected by Date Range in EMIS

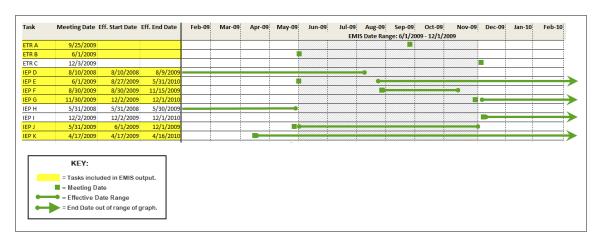
The date range entered in the **Start Date** and **End Date** fields on the EMIS Extract and EMIS Review Report screens select tasks based on the following event dates:

- Meeting Date The value entered in the Meeting Date field on the cover page of an ETR, IEP or ISP task. For tasks to appear in the EMIS Extract or on the EMIS Review Report, the meeting date of the task must fall within the entered date range, including the first and last date in the range.
- Effective Dates The values entered in the effective Start and End fields on the cover page of an IEP or ISP Task. For tasks to appear in the EMIS Extract or on the EMIS Review Report, the effective dates of the task must fall within the entered date range but can start or end before, after or during the range.

For example, if the date range entered for the EMIS Review Report or EMIS Extract is 06/01/2009 - 12/01/2009, tasks with the following meeting or effective dates would appear on the report:

- Any ETR, IEP or ISP task with a meeting date of 06/01/2009 through, and including, 12/01/2009.
- Any IEP or ISP task with an effective start date before 06/01/2009 and an effective end date before 12/01/2009, such as 08/10/2008 - 08/09/2009.
- Any IEP or ISP task with an effective start date after 06/01/2009 and effective end date after 12/01/2009, such as 08/27/2009 - 05/31/2010.
- Any IEP or ISP task with an effective start date after 06/01/2009 and effective end date before 12/01/2009, such as 08/30/2009 - 11/15/2009.
- Any IEP or ISP task with an effective start date before 06/01/2009 and effective end date after 12/01/2009, such as 04/17/2009 - 04/16/2010.

"Tasks Included in EMIS Review Report and EMIS Extract by Date Range" shows example scenarios where tasks are included in or excluded from the EMIS Review Report and EMIS Extract when run by a date range of 06/1/2009 - 12/01/2009.



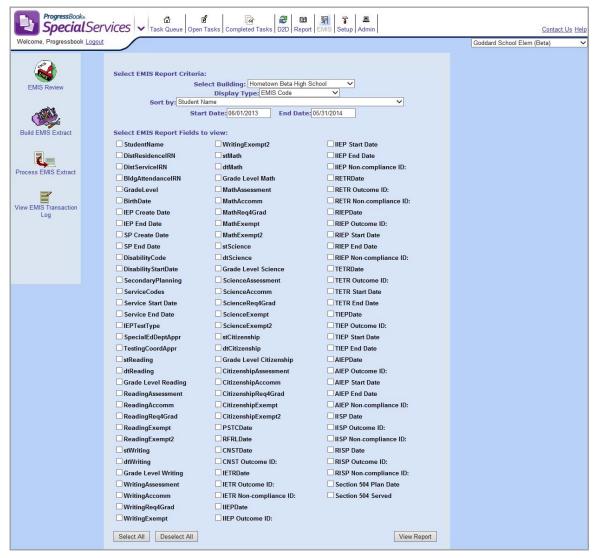
Tasks Included in EMIS Review Report and EMIS Extract by Date Range

Run EMIS Review Report

The EMIS Review Report lists all of the students whose IEP, ETR or ISP task has an event date that falls within a specified range and enables you, depending on your security privileges, to view or edit the EMIS Data Collection Form after a task has been completed. You can select the information you want to display about the student on the report.

1. On the banner, click **EMIS**

The EMIS Selection Form screen displays.



EMIS Selection Form Screen

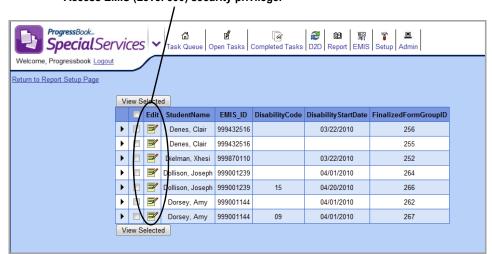
 In the Select EMIS Report Criteria section of the EMIS Selection Form screen, in the Select Building drop-down list, select the school for which you want to run the EMIS Review Report. **Note:** Depending on your level of access, either the Building or Class drop-down list displays on the EMIS Selection Form screen.

- 3. In the **Display Type** drop-down list, select the display type for the report. This option determines how some of the data elements you select in step 4 display.
 - **EMIS Code** Displays only the EMIS code for the data element. For example, if you select to view the **DistrResidenceIRN** data element, only the IRN for the student's district of residence displays on the EMIS Review Report.
 - Description Displays only the description for the data element. For example, if you select to view the DistrResidenceIRN data element, only the description of the student's district of residence displays on the EMIS Review Report.
 - EMIS Code & Description Displays the EMIS code and description for the data element. For example, if you select to view the DistrResidenceIRN data element, the EMIS code and description for the student's district of residence display on the EMIS Review Report.
- 4. In the **Sort by** drop-down list, select the data element by which you want the system to sort the information on the report.
- 5. In the **Start Date** and **End Date** fields, enter the start and end date range within which you want to view the applicable tasks. See "How Tasks Are Selected by Date Range in EMIS." The default date range is the current EMIS event year; for example, 06/01/2012 for the start date and 05/31/2013 for the end date.
- 6. In the **Select EMIS Report Fields to view** section, select the check box next to the data elements you want to display on the EMIS Review Report. Ensure you select the data element by which you selected to sort the report in step 4.

Note: To quickly display the report, it is recommended to select Student Name, IEP Create Date and IEP End Date.

7. Click View Report.

The EMIS Review Report displays all of the completed tasks that fall within the selected criteria.



Only displays for users assigned the Access EMIS (Level 500) security privilege.

EMIS Review Report

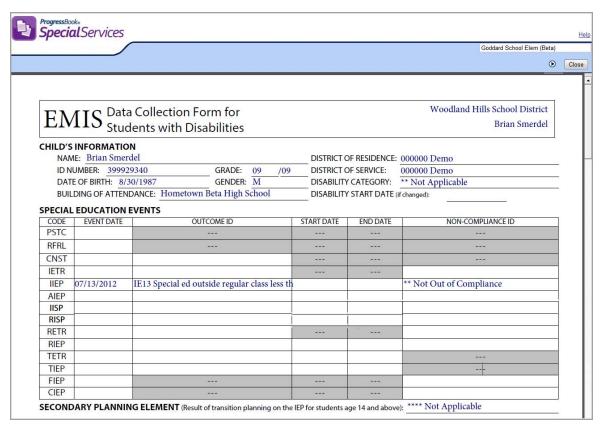
- 8. You can perform one of the following optional actions:
 - View the EMIS Data Collection Form for one or multiple tasks. See "View EMIS Data Collection Form."
 - Edit the EMIS Data Collection Form for a task.
 See "Edit EMIS Data Collection Form."

View EMIS Data Collection Form

Users assigned the Level 300 or 400 role can view the EMIS Data Collection Form for completed IEP, ETR and ISP tasks from the EMIS Review Report.

- 1. Run the EMIS Review Report, as described in step 1 through step 7 in "Run EMIS Review Report."
- 2. Next to each student and task you want to view, select the check box.
- 3. Click View Selected.

The EMIS Data Collection Form for the student or students you selected displays in a new window. If you selected multiple students, all of the forms are merged into a single file.



EMIS Data Collection Form in View Mode

- 4. To print the form, on the toolbar, click 🗐 .
- 5. To return to the EMIS Review Report, click **Close**.

Edit EMIS Data Collection Form

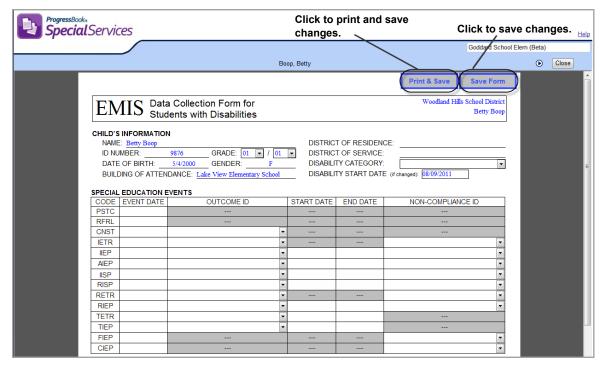
Users assigned the Level 500 role (or users assigned the Access EMIS security privilege) can edit the EMIS Data Collection Form. It is recommended that you only modify fields on the EMIS Data Collection Form that cannot be corrected on the forms of a task. If you modify the EMIS Data Collection Form to quickly make a correction under time constraints, you should correct the appropriate form in the related task so that the correct information is reflected in the student's records. For more information about the recommended procedure for correcting errors in the EMIS Extract, see "Correct EMIS Errors."

- Run the EMIS Review Report, as described in step 1 through step 7 in "Run EMIS Review Report."
- 2. Next to the student's name, click .

The EMIS Data Collection Form for the student you selected displays in a new window.

Note: You cannot delete the values in the Start Date and End Date fields for the IIEP, RIEP and AIEP events. To delete the values in these fields, make the necessary changes on the IEP Cover Page.

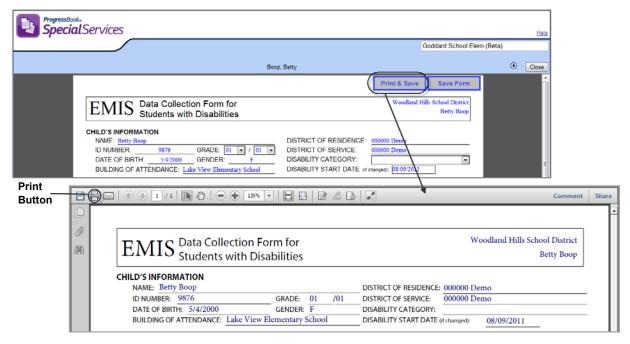
Note: You cannot delete the values in the Start Date and End Date fields for the IISP and RISP events. To delete the values in these fields, make the necessary changes on the SP Cover Page.



EMIS Data Collection Form in Edit Mode

- 3. Modify the EMIS Data Collection Form as necessary.
- 4. To print and save the form, click **Print & Save**. Or to save the changes, click **Save Form**.

Note:When you click Print & Save, the form is saved in the system, and the form appears in another window as a PDF where you can click the print button to print the page.



Printable EMIS Data Collection Form

5. To return to the EMIS Review Report, click Close.

Build EMIS Extract

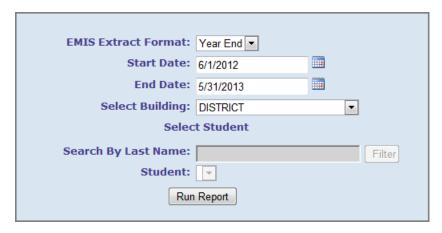
You can build the EMIS Extract for all of the students in the entire district, only the students in an individual building or a specific student.

If missing or invalid data is detected in the process of creating the extract file, the system generates an error log, which you can view to locate the source of each error. To ensure the correct information is reported to EMIS, you should resolve all data errors and rebuild the EMIS Extract before importing it into your student information system. See "Correct EMIS Errors."

Build EMIS Extract by District

- 1. On the banner, click **EMIS** 🗐
- 2. On the EMIS tools screen, click **Build EMIS Extract**.

The following options display to enable you to select the data to send to the EMIS Extract.



EMIS Extract Options Screen – Build by District

- 3. in the **EMIS Extract Format** drop-down list, select the reporting period for which you are creating the EMIS Extract.
- 4. In the **Start Date** and **End Date** fields, enter the applicable start and end dates for the reporting period you selected in step 3. The default date range is the current EMIS event year; for example, 06/01/2012 for the start date and 05/31/2013 for the end date. See "How Tasks Are Selected by Date Range in EMIS."
- 5. In the **Select Building** drop-down list, select **DISTRICT**.
- 6. Click Run Report.

If the extract is created without error, the following message displays: "Extract completed successfully." You must now save the file to a location from which you can import it into your student information system. See "Process EMIS Extract."

If data is missing or invalid, an error log is created and the message shown in "View Error Log from EMIS Extract Options Screen" displays. To view the errors, click View Error Log. You can also view the error log at a later time from the Process EMIS Extract screen. See "View EMIS Extract and Error Log Files."

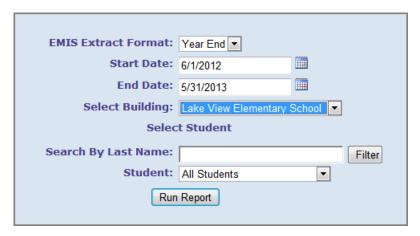


View Error Log from EMIS Extract Options Screen

Build EMIS Extract by Building

- 1. On the banner, click **EMIS** \$\frac{\mathbf{S}}{2}\$.
- 2. On the EMIS tools screen, click Build EMIS Extract.

The following options display to enable you to select the data to send to the EMIS Extract.



EMIS Extract Options Screen – Build by Building

- 3. In the **EMIS Extract Format** drop-down list, select the reporting period for which you are creating the EMIS Extract.
- 4. In the **Start Date** and **End Date** fields, enter the applicable start and end dates for the reporting period you selected in step 3. The default date range is the current EMIS event year, for example, 06/01/2012 for the start date and 05/31/2013 for the end date. See "How Tasks Are Selected by Date Range in EMIS."
- 5. In the **Select Building** drop-down list, select the building for which you want to create the EMIS Extract.
- 6. Click Run Report.

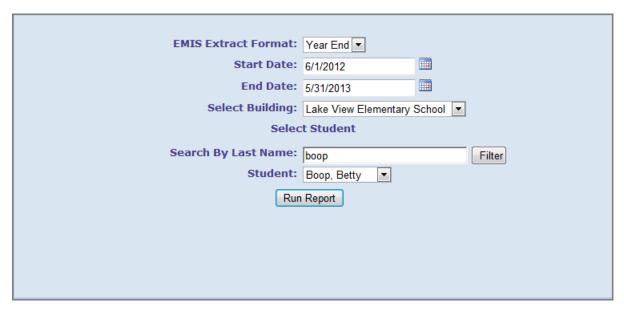
If the extract is created without error, the following message displays: "Extract completed successfully." You must now save the file to a location from which you can import it into your student information system. See "Process EMIS Extract."

If data is missing or invalid, an error log is created, and the message shown in "View Error Log from EMIS Extract Options Screen" displays. To view the errors, click View Error Log. You can also view the error log at a later time from the Process EMIS Extract screen. See "View EMIS Extract and Error Log Files."

Build EMIS Extract by Student

- 1. On the banner, click **EMIS** \P .
- 2. On the EMIS tools screen, click Build EMIS Extract.

The following options display to enable you to select the data to send to the EMIS Extract.



EMIS Extract Options Screen – Build by Student

- 3. In the **EMIS Extract Format** drop-down list, select the reporting period for which you are creating the EMIS Extract.
- 4. In the **Start Date** and **End Date** fields, enter the applicable start and end dates for the reporting period you selected in step 3. The default date range is the current EMIS event year, for example, 06/01/2012 for the start date and 05/31/2013 for the end date. See "How Tasks Are Selected by Date Range in EMIS."
- 5. In the **Select Building** drop-down list, select the building for which you want to create the EMIS Extract.
- 6. In the **Search By Last Name** field, enter all or part of the student's last name, and then click **Filter**.

The **Student** drop-down list refreshes with the students whose last name most closely matches the text you entered in the **Search By Last Name** field. If there is an exact match, the applicable student displays in the **Student** drop-down list.

- 7. If the appropriate student is not already selected, in the **Student** drop-down list, select the student.
- 8. Click Run Report.

If the extract is created without error, the following message displays: "Extract completed successfully." You must now save the file to a location from which you can import it into your student information system. See "Process EMIS Extract."

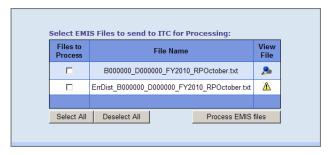
If data is missing or invalid, an error log is created, and the message shown in "View Error Log from EMIS Extract Options Screen" displays. To view the errors, click View Error Log. You can also view the error log at a later time from the Process EMIS Extract screen. See "View EMIS Extract and Error Log Files."

View EMIS Extract and Error Log Files

The EMIS Extract and error log files display on the Process EMIS Extract screen. You can view the contents of these files to assist you in troubleshooting and correcting EMIS extract errors.

- 1. On the banner, click **EMIS** \$\frac{1}{3}\$.
- On the EMIS tools screen, click Process EMIS Extract.

The previously created EMIS Extract files and any error logs display on the Process EMIS Extract screen.



EMIS Extract and Error Log Files on Process EMIS
Extract Screen

- 3. Perform one of the following actions:
 - To view an error log file, next to the desired file, click ...
 - To view an EMIS Extract file, next to the desired file, click



Both types of file display in text format in a new window, as shown in "Example Error Log File" and "Example EMIS Extract File." You can also select to save the files to a different location where you can view them again later. See "Save EMIS Extract and Error Log Files."

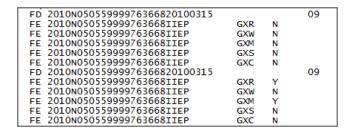
```
Denes, Clair (999432516) - GE - No Dates entered for any Special Education Events.

Denes, Clair (999432516) - GE - Event RETR missing Event Date but Non-Compliance ID is selected.

Denes, Clair (999432516) - GE - Event RIEP missing Event Date but Non-Compliance ID is selected.

DiMino, Nadja (999834286) - GE - No Dates entered for any Special Education Events.
```

Example Error Log File



Example EMIS Extract File

4. When you are finished viewing the file, close the window.

File Naming Conventions

To easily identify the EMIS Extract and error log files, SpecialServices names the files by the selection criteria, reporting period and school year for which the extract was created. The following sections describe how SpecialServices names the files when the EMIS Extract is run by district, building or student.

District File Naming Convention

If the extract was created for an entire district, the file name comprises the following three parts:

- The district IRN (prefixed by D), for example: D999123.
- The fiscal year (prefixed by FY) for which the file was created, for example: FY2010.
- The reporting period (prefixed by RP) for which the file was created, for example: RPOctober.

For example, an EMIS Extract file run for district 999123 and the October reporting period in the 2009-2010 school year would display as D999123_FY2010_RPOctober.txt.

Building File Naming Convention

If the file was created for a single building, the file name comprises the following four parts:

- The building IRN (prefixed by B), for example: B999321.
- The district IRN (prefixed by D), for example D999123.
- The fiscal year (prefixed by FY) for which the file was created, for example: FY2010.
- The reporting period (prefixed by RP) for which the file was created, for example: RPOctober.

For example, an EMIS Extract file run for building 999321, district 999123 and the October reporting period in the 2009-2010 school year would display as B999321_D999123_FY2010_RPOctober.txt.

Student File Naming Convention

If the file was created for a single student, the file name comprises the following four parts:

- The student's EMIS ID (prefixed by S), for example: S999246803.
- The district IRN (prefixed by D), for example: D999123.
- The fiscal year (prefixed by FY) for which the file was created, for example: FY2010.
- The reporting period (prefixed by RP) for which the file was created, for example: RPOctober.

For example, an EMIS Extract file run for student 999246803, district 999123 and the October reporting period in the 2009-2010 school year would display as S999246803 D999123 FY2010 RPOctober.txt.

Error Log Naming Convention

Error logs are prefixed with "ErrDist" and use the file naming convention of the corresponding EMIS Extract file.

For example, an error log for an EMIS Extract file run for student 999246803, district 999123 and the October reporting period in the 2009-2010 school year would display as ErrDist_S999246803_D999123_FY2010_RPOctober.txt.

Save EMIS Extract and Error Log Files

- 1. On the banner, click **EMIS** \$\frac{\mathbf{S}}{3}\$.
- 2. On the EMIS tools screen, click Process EMIS Extract.

The previously created EMIS Extract files and any error logs display on the Process EMIS Extract screen.

- 3. Perform one of the following actions:
 - To save an error log file, next to the desired file, click ...
 - To save an EMIS Extract file, next to the desired file, click .
 The file you selected opens in a new window.
- 4. Click Page > Save As.
- 5. On the Save Webpage window, select the location to which you want to save the file, and then click **Save**.

Correct EMIS Errors

You should correct any errors in the EMIS Extract by modifying the appropriate form in the task. Only modify the EMIS Data Collection Form directly in situations where you need to quickly resolve an error. Any time you modify the EMIS Data Collection Form, you should correct the corresponding task so that it reflects the most current information for the student's special education program.

The following steps describe the recommended procedure for resolving EMIS Extract errors:

- 1. Create a new task from the task that contains the incorrect information. See "Create New Tasks from Existing Tasks" in *ProgressBook SpecialServices User Guide*.
- 2. Correct the appropriate forms in the task as necessary.
- 3. Complete the task. See "Complete Tasks" in ProgressBook SpecialServices User Guide.
- 4. On the Completed Tasks screen, perform one of the following actions:
 - For the task that contains the incorrect information, deselect the Include In Emis check box. See "Exclude Tasks from EMIS."

or

- Delete the incorrect task.
- 5. Build the EMIS Extract for the appropriate reporting period and student, and then verify that the error no longer occurs.

Note: When correcting errors, you may find it easier to verify that the error has been corrected by building the EMIS Extract for only the student whose data you corrected.

EMIS Extract Error Messages

Error Message	Problem/Solution		
	General		
No EMIS Data Found for specified Student(s). The extract file was not generated.	Verify that there is an applicable task in the date range you specified.		
Building - Building IRN undeterminable for Building_DBID:	Your building is not set up correctly in ProgressBook GradeBook. Contact your system manager.		
Building - Fiscal Year undeterminable for Building_DBID:	Your building is not set up correctly in ProgressBook GradeBook. Contact your system manager.		
Student Attribut	Student Attributes - Effective Date Record (FD)		
[Student Name (Last, First, Middle)] [EMIS ID] - FD - Effective Start Date missing for student with changed disability.	Enter the appropriate date in the Meeting Date field on the ETR Cover Page or the ETR Completion Date on the IEP Cover Page or SP Cover Page, as applicable for the indicated student.		
[Student Name (Last, First, Middle)] [EMIS ID] - FD - Grade Level undeterminable for student.	Select the appropriate grade level from the Grade list on the cover page of the applicable task.		
[Student Name (Last, First, Middle)] [EMIS ID] - FD - Disability Code undeterminable for student.	Your district is not set up correctly in ProgressBook SpecialServices. Contact your system manager.		
[Student Name (Last, First, Middle)] [EMIS ID] - FD - Disability '16' selected for student who is not in grade level 'PS.'	The selected disability code ("16 Developmental Delay") only applies to preschool students and the grade level of the indicated student is not preschool (PS). Select the correct disability for the student in the Disability Code list on the Student Properties window or the Disability Determination list on the ETR 4 Eligibility page.		
[Student Name (Last, First, Middle)] [EMIS ID] - FD - Disability '**' not selected for a student who is being served with a 504 Plan.	Ensure the disability condition is set to "**" for the student being served by a 504 Plan whose FD record is being created.		
[Student Name (Last, First, Middle)] [EMIS ID] - FD - Effective Start Date missing for student being served with a 504 Plan.	Enter an Effective Start Date for the student being served by a 504 Plan whose FD record is being created.		
[Student Name (Last, First, Middle)] [EMIS ID] - FD - The student being served with 504 Plan value is missing.	Select the appropriate option for whether or not the student is served by a Section 504 Plan on the Section 504 Plan Signature Page.		
Student Program Record (GQ)			
[Student Name (Last, First, Middle)] [EMIS ID] - GQ - Service [code] missing Start Date.	Enter the appropriate date in the Begin field for the indicated service in the Related Services, Specially Designed Instruction, or Support for School Personnel section of IEP 7 or SP 2.		
[Student Name (Last, First, Middle)] [EMIS ID] - GQ - Service [code] missing End Date.	Enter the appropriate date in the End field for the indicated service in the Related Services, Specially Designed Instruction, or Support for School Personnel section of IEP 7 or SP 2.		
Student Assessment Record (FA)			
[Student Name (Last, First, Middle)] [EMIS ID] - FA - Test [test] Subject [subject] missing Test Type value.	A test type is not selected where an achievement test and grade level are selected for the indicated subject. The Type of Assessment field does not contain a value on the EMIS Data Collection Form. Select the check box for the test type in the Child Will Be Tested column for the indicated subject area and test on the appropriate		
	Statewide and District Wide Testing page.		

Error Message	Problem/Solution	
[Student Name (Last, First, Middle)] [EMIS ID] - FA - Test [test] Subject [subject] invalid Grade Level at Time of Test value for [GO or GA or GX] Assessment.	The grade level is not selected where an achievement test is selected for the indicated subject.	
	Select the appropriate grade level in which the test will be administered in the Grade list for the indicated test and subject area on the appropriate Statewide and District Wide Testing page.	
[Student Name (Last, First, Middle)] [EMIS ID] - FA - Test [test] Subject [subject] Accommodation value not applicable for Test Type value selected.	The Testing Accomm. field contains an invalid value on the EMIS Data Collection Form where an achievement test is selected for the indicated subject.	
	Select the appropriate accommodation for the selected test type on the appropriate Statewide and District Wide Testing pages.	
[Student Name (Last, First, Middle)] [EMIS ID] - FA - Test [test] Subject [subject] missing Accommodations value.	A test type is not selected where an achievement test and grade level are selected for the indicated subject. The Testing Accomm. field does not contain a value on the EMIS Data Collection Form. Select the check box for the test type in the Child Will Be Tested column for the indicated subject area and test on the appropriate Statewide and District Wide Testing page.	
[Student Name (Last, First, Middle)] [EMIS ID] - FA - Alternate Assessment test type not applicable for Kindergarten Readiness (KRA-L).	An invalid test type is selected where KG Assessment and a grade level are specified for the Reading subject area. An invalid value displays in the Type of Assessment field on the EMIS Data Collection Form. Select the check box for the test type in the Child Will Be Tested column for the Reading subject area on the appropriate Statewide and District Wide Testing page.	
[Student Name (Last, First, Middle)] [EMIS ID] - FA - Test [test] Subject [subject] missing Date of Test value.	No date is entered for state tests. Select the date for the test in the Date of Test column on the appropriate Statewide and District Wide Testing page.	
[Student Name (Last, First, Middle)] [EMIS ID] - FA - Test XX Subject X Test Type of Alt is not valid for a 504 Plan.	The selected Test Type of "ALT" is invalid for a 504 Plan.	
[Student Name (Last, First, Middle)] [EMIS ID] - FA - Test XX Subject X Accommodations value of 'Y2', 'Y3' or '**' is not valid for a 504 Plan.	The selected Accommodations value of "Y2," "Y3" or "**" is invalid for a 504 Plan.	
Student Special Education Record (GE)		
[Student Name (Last, First, Middle)] [EMIS ID] - GE - Event XXXX missing IEP Test Type value.	Select the appropriate value in the IEP Test Type list on the Special Education Events Form of the task for the indicated student. This error message is valid for the following events: IIEP, RIEP, AIEP and TIEP.	

Error Message	Problem/Solution
[Student Name (Last, First, Middle)] [EMIS ID] - GE - Event [Event] IEP Test Type value "***" not applicable for the event Outcome ID value selected.	"*** Not Applicable" is selected in the IEP Test Type list on the Special Education Events Form for an invalid IEP event. The "*** Not Applicable" option is only valid for IIEP, RIEP and AIEP tasks in which the value selected in the Outcome ID list for the indicated event is one of the following: • IEPD Resulted in Due Process • IENS IEP Completed - Not Served • IEPR IEP Completed - Parental Refusal The "*** Not Applicable" option is not valid for any TIEP events. Select the appropriate value in the IEP Test Type list on the Special Education Events Form of the task for the indicated student. This error message is valid for the following events: IIEP, RIEP, AIEP, and TIEP.
[Student Name (Last, First, Middle)] [EMIS ID] - GE - Event XXXX missing Secondary Planning value.	Select the appropriate value in the Secondary Planning list on the Special Education Events Form of a task for the indicated student. This error message is valid for the following events: IIEP, RIEP, and AIEP.
[Student Name (Last, First, Middle)] [EMIS ID] - GE - No dates entered for any Special Education Events.	No dates have been entered on the Special Education Events Form for the task. Complete the appropriate information for the appropriate events on the Special Education Events Form.
[Student Name (Last, First, Middle)] [EMIS ID] - GE - [Event] missing Outcome ID value.	Select the appropriate value in the Outcome ID list for the indicated event on the Special Education Events Form. This error message is valid for the following events: CNST, IIEP, IETR, RETR, RIEP, AIEP, TETR, TIEP, IISP and RISP.
[Student Name (Last, First, Middle)] [EMIS ID] - GE - [Event] missing Event Date but Outcome ID is selected.	Enter the appropriate date in the Date field for the indicated event on the Special Education Events Form. This error message is valid for the following events: CNST, IIEP, IETR, RETR, RIEP, AIEP, TETR and TIEP.
[Student Name (Last, First, Middle)] [EMIS ID] - GE - [Event] missing Non-Compliance ID value.	Select the appropriate value in the Non-compliance ID list for the indicated event on the Special Education Events Form. This error message is valid for the following events: IETR, IIEP, RETR, RIEP, AIEP, FIEP, CIEP, IISP and RISP.
[Student Name (Last, First, Middle)] [EMIS ID] - GE - [Event] missing Event Date but Non-Compliance ID is selected.	Enter the appropriate date in the Date field for the indicated event on the Special Education Events Form. This error message is valid for the following events: IETR, IIEP, RETR, RIEP, AIEP, FIEP and CIEP.
[Student Name (Last, First, Middle)] [EMIS ID] - GE - Event TIEP missing End Date.	Enter the appropriate date in the Date field for the indicated event on the Special Education Events Form.
[Student Name (Last, First, Middle)] [EMIS ID] - GE - Event TETR missing End Date.	Enter the appropriate date in the Date field for the indicated event on the Special Education Events Form.
[Student Name (Last, First, Middle)] [EMIS ID] - GE - [Event] missing Start Date.	Enter the appropriate date in the Start field for the IEP Effective Dates on the Cover page. This error message is valid for the following events: IIEP, FIEP, RIEP and AIEP.
[Student Name (Last, First, Middle)] [EMIS ID] - GE - [Event] missing End Date.	Enter the appropriate date in the End field for the IEP Effective Dates on the Cover page. This error message is valid for the following events: IIEP, FIEP, RIEP and AIEP.

Error Message	Problem/Solution	
[Student Name (Last, First, Middle)] [EMIS ID] - GE - [Event] missing Start Date.	Enter the appropriate date in the Start field for the ISP Effective Dates on the Cover page.	
	This error message is valid for the following events: IISP and RISP.	
[Student Name (Last, First, Middle)] [EMIS ID] - GE - [Event] missing End Date.	Enter the appropriate date in the End field for the ISP Effective Dates on the Cover page.	
	This error message is valid for the following events: IISP and RISP.	
Student Special Education Graduation Requirement Record (FE)		
[Student Name (Last, First, Middle)] [EMIS ID] - FE - Test [test] Subject [subject] missing Required for Graduation value.	Required for Graduation value is missing where test grade level and subject type are selected for the indicated subject.	
	This error message is valid for the following events: IIEP, RIEP, AIEP, TIEP, FIEP and CIEP.	
[Student Name (Last, First, Middle)] [EMIS ID] - FE - Test [test] Subject [subject] missing IEP Event Date.	IEP Event Date is missing where subject type is selected for indicated subject.	
	This error message is valid for the following events: IIEP, RIEP, AIEP, TIEP, FIEP and CIEP.	
[Student Name (Last, First, Middle)] [EMIS ID] - FE - Test XX Subject X Exemption Flag value of 'Y' is not valid for a 504 Plan.	The Exemption Flag selection of "Y" is invalid for a 504 Plan.	

Exclude Tasks from EMIS

The **Include In Emis** check box is selected by default for all IEP, ETR and ISP tasks. You can exclude these tasks from reporting in the EMIS Extract by deselecting the **Include In Emis** check box on the Completed Tasks screen. For example, you may have several completed draft copies of an IEP that you do not want to appear in the EMIS Extract; you could deselect the **Include in Emis** check box for these drafts.



Include in Emis Check Box on Completed Tasks Screen

Process EMIS Extract

After you build the EMIS Extract, the extract file, including any corresponding error log files, appears on the Process EMIS Extract screen. You can view the files, as described in "View EMIS Extract and Error Log Files," or process the EMIS Extract using one of the following options:

- **Local processing** Enables you to save the EMIS Extract file to a desired location from which you can import it into your student information system.
- ITC or agency processing Saves the EMIS Extract to the location specified in AppSettings.config.

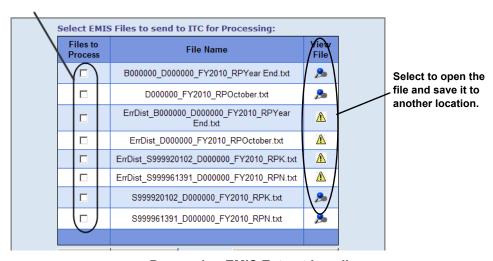
Contact your system manager for more information about which option your district uses to process the EMIS Extract.

Process EMIS Extract File Locally

If your district uses the local processing option, you can save the EMIS Extract file to a location—either on the hard drive of your computer or on the network—that will allow you to easily import it into your student information system.

1. On the EMIS tools screen, click **Process EMIS Extract**.

The previously created EMIS Extract files and any error logs display on the Process EMIS Extract screen.



Processing EMIS Extract Locally

- 2. To open an EMIS Extract file in a new window, click 🔑.
- 3. Click Page > Save As.
- 4. On the Save Webpage window, select the location to which you want to store the EMIS Extract, and then click **Save**.
- 5. Once the file is stored to the location you specified, you can perform the following steps:
 - Import the EMIS Extract file into your student information system. You must log in to your student information system to import the file.
 - Clear the old EMIS Extract and error log files from the Process EMIS Extract screen.
 See "Purge Process EMIS Extract Screen."

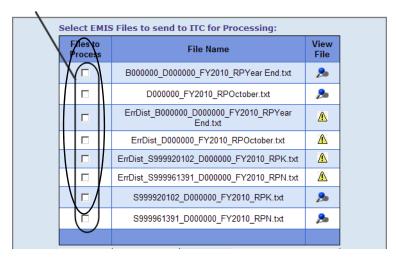
Purge Process EMIS Extract Screen

If your district processes the EMIS Extract locally, the EMIS Extract and error log files are not automatically removed from Process EMIS Extract screen. You may want to periodically purge the old files from the screen to make it easier to locate newer files.

Note: If you process the EMIS Extract through an ITC or agency, the selected files are automatically purged when you process the EMIS Extract.

1. On the EMIS tools screen, click **Process EMIS Extract**.

The previously created EMIS Extract files and any error logs display on the Process EMIS Extract screen.



Removal of Files in the Files to Process Column

- Perform one of the following actions:
 - Next to each file you want to purge, select the check box.
 - To purge all of the files, click Select All.
- 3. To purge the selected files, click **Process EMIS files**.

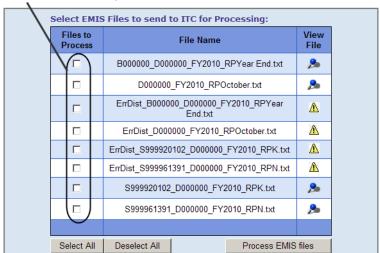
A message displays, "Process Completed Successfully." The files you selected in step 2 are removed from the Process EMIS Extract screen.

Process EMIS Extract File Through ITC or Agency

If your district processes the EMIS Extract file through an ITC or agency, you can use the EMIS processing options to save the EMIS Extract file to the EMISOutput folder on the SpecialServices web server. The location of the EMISOutput folder is specified in AppSettings.config.

1. On the EMIS tools screen, click **Process EMIS Extract**.

The previously created EMIS Extract files and any error logs display on the Process EMIS Extract screen.



Select the files to process.

Process EMIS Extract Through ITC or Agency

- 2. Perform one of the following actions:
 - Next to each file you want to process, select the check box.
 - To process all of the files, click Select All.

Note: You can select the error log files to remove them from the screen after the EMIS Extract file is processed.

3. To save the selected files to the EMISOutput folder, click **Process EMIS files**.

A message displays, "Process Completed Successfully." The files you selected to process in step 2 are removed from the Process EMIS Extract screen.

You can now import the EMIS Extract into your student information system. You must log into your student information system to import the file.

View EMIS Transaction Log

If your district processes the EMIS Extract through an ITC or agency, as described in "Process EMIS Extract File Through ITC or Agency," you can view the status information on the EMIS Transaction Log screen. Additionally, you can purge the transaction activity within a date range when you no longer want it to display.



EMIS Transaction Log

Purge Activity from Transaction Log

Purging activity from the transaction log only deletes the status information that displays on the EMIS Transaction Log screen; this action does not delete EMIS Extract or error log files stored locally or on the SpecialServices web server.

- 1. On the EMIS tools screen, click **View EMIS Transaction Log**.
- 2. On the EMIS Transaction Log screen, in the **Start Date** and **End Date** fields, enter the start and end dates within which you want to purge the transaction activity.
- 3. Click Purge.

The message displays, "This action will delete all transaction logs within the date range specified. Are you sure want to do this?"

4. To delete the transaction activity, click **OK**.