Progress Reporting
Set Up / Configuration
Administrator Guide

IEPPLUS
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OVERVIEW

The Progress Reporting module allows the staff to document progress against a set of goals and objectives in a Plan (i.e., IEP, Gifted IEP, and Services Plan).

This document is written to guide the administrators of the IEPPLUS program to set up the Progress Reporting module. This documentation is not intended for the typical end-user of IEPPLUS that will be creating Progress Reports for individual students.

Steps to configure Progress Reporting:

1. Table Setup
2. Configure System Options
3. Define Progress Keys, Reporting Template, Validation & Options
4. Security Setup

STEP 1: TABLE SETUP

The first step is to verify the tables that need to be setup, and there are two tables that control what is displayed in the Student Filters Template:

1. Grade Table – determines the order in which the grades appear.
2. Organization Table – determines which grades appear.

GRADE TABLE

The Grade Table contains the codes designating the student groupings for teaching purposes (e.g., K-Kindergarten, 01-First Grade, 02-Second Grade). Each grade in this table must be setup with an "Order Number" Alternate Code and Description (sequence number) which controls the grade's position in the grade ranges used in the progress reporting template slider. In this example, First Grade has 1 in the Description field, and Second Grade has 2 in the Description field, etc. The IEPPLUS program defaults Kindergarten to have an Order Number Description = 0. If a Preschool is present, then the user can make this the first choice in the progress reporting slider by making it a negative number such as -1. If Preschool through 12 exists, then the Order Number Description would be like this: Preschool = -1, Kindergarten = 0, Grade 1 = 1, Grade 2 = 2, etc.
To verify and setup the Grade table Alternate Code, follow these steps:

1. From the Home Page, Maintenance section, select Manage Code Tables.
2. Select the Grade code table from the drop down list.
3. Click on the Show Alternate Codes link.
4. Verify that each grade has an Alternate Code with Type=Order Number and Description=a number designating that grade’s sequence in the grade range.
5. To modify a record, click the Edit link.
   - The links to add or edit Alternate Code Type and Description will display.
6. Click on the Add or the Edit link (as appropriate), select Type = Order Number and enter a sequence number in the Description field.
7. Click Update to save the changes.

The slider bars to the left and right allow selection of the grade range that will apply to a given progress reporting template. Please see section on Reporting Templates herein for more information.

**ORGANIZATION TABLE**

The Organization Table contains the codes designating the student Start Grade & End Grade groupings. The grades identified in these two fields controls the grade range used in the progress reporting template slider. In this example, we chose Organization = TEST HIGH SCHOOL in the Organizations Table, in which we set the Start Grade = 09 and the End Grade = 23. By doing so, we determine that the only grade levels 09 through 23 can be chosen in the progress reporting template slider for the grade range.

To verify and setup the Organizations Start & End Grade, follow these steps:

1. From the Home Page, Maintenance section, select Manage Organizations.
2. Use the Search box to find the Organization, and click the ‘Edit’ button to enter into the form.
3. Choose the Start Grade (in this example, we chose “09”) from the form’s drop-down.
4. Choose the End Grade (in this example, we chose “23”) from the form’s drop-down.
5. Click on the ‘Save’ button to save the changes.
Below is the ‘Manage Organizations’ link screenshot (on the Main page):

Below is the Organization Form (‘Main’ tab)

Below is the Organizations Summary screenshot:
The screenshot below illustrates how the values entered in the Grade Code & Organization Tables determine the grade that can be chosen, and the order in which they appear, in the progress reporting template slider (this shows our example using the “TEST HIGH SCHOOL” building):

**STEP 2: CONFIGURE SYSTEM OPTIONS**

This step will determine the type of Progress Reporting that will be used by the school district. There are two options: New Progress Reporting (available in version 4.2.xxxxx or greater) or Legacy Progress Reporting.

Note: This documentation references the configuration and set up of the “new” Progress Reporting feature. Refer to the screen shot below. Selecting the “New Progress Reporting” option is to be used when the district will be using the “new” progress reporting method. Select “Legacy Progress Reporting” for the original progress reporting tool.

By selecting the “New Progress Reporting” option, the system will then activate the additional two options within this area (Phase In by IEP and Phase in by Period).
**PHASE IN BY IEP**

Selecting this option will allow the users to only use the new progress reporting feature for new IEP’s and existing IEP's that do not have legacy progress associated to the goals or objectives. Existing IEP's that do have legacy progress associated to any goals or objectives will continue to be managed using the legacy progress reporting tool.

**PHASE IN BY PERIOD**

Selecting this option will allow the users to use the new progress reporting feature immediately for existing IEP’s that have legacy progress. Existing periods with legacy progress associated to the goals and/or objectives will be managed using legacy progress reporting. Periods without legacy progress will be managed using the new progress reporting method.

To configure system options for progress reporting, follow these steps.

1. From the Home Page, Options section, select Set Systemwide Options.
2. Click on the Progress Reporting tab at the top of the page.
3. Select from the available options and click Save.

**STEP 3: DEFINE PROGRESS KEYS, REPORTING TEMPLATES & OTHER OPTIONS**

**PROGRESS KEYS**

Progress Keys identify a collection of progress indicators (e.g., the letter grades A-F being used at the high school level). To setup Progress Keys, follow these steps.

1. From the Home Page, Options section, select Manage Progress Reporting.
2. Click the Add Progress Key link and enter a Progress Key Name (e.g., High School).
3. Enter a Progress Indicator Code (e.g., A) and Description (e.g., Superior), then click the + icon to add the record. Repeat this step for each indicator being added.
   - As each item is added, it will display beneath the entry area.
4. To change an entry, click the pencil icon, enter corrections and click the appropriate icon (see screenshot below) to save or cancel the update.

5. When the Progress key is completed, click on Save Progress Key.

REPORTING TEMPLATES

A Reporting Template defines the marking periods and student filters applicable to a given Progress Key.

To add a Reporting Template, follow these steps.

1. From the Home Page, Options section, select Manage Progress Reporting.
2. Click the Add Template link.
3. Enter a name for the template, select a Progress Key from the drop down list and click the appropriate icon to save (or cancel) the update.
4. Next, click the appropriate icon to enter the Reporting Periods for the reporting template.

5. Enter the end date for the marking period (or select a date from the calendar displayed after clicking in the New Reporting Period field). Then click the + icon to add the record. Repeat these steps for each Reporting Period being added.
   • As each item is added, it will display beneath the entry area.

6. To change an entry, click the pencil icon, enter corrections and click the appropriate icon to save (or cancel) the update.
7. When all the Reporting Periods have been entered, click the Save button.
8. Lastly, click the icon to apply Student Filters to the template (see screenshots below).

- The screen illustrated below will display.

9. Select a Building from the drop down list. Then select a Grade Range for the template, by clicking on and dragging the bars on the slider to the left or right.
10. Click on the + icon to save the building/grade options selected.
11. When all the buildings and grade ranges have been added, click the Save button.

The building and grade in the student's current Enrollment or Placement record (as appropriate) will determine the template used. Marking Periods will reflect date ranges of Recommended, Summer and Next Recommended Placements. For example, if no services are being offered during the summer session, the summer marking periods (if any) would be excluded.

EXCEPTION TEMPLATES

Reporting Templates can be setup to take precedence over other applicable (non-exception) templates by selecting the Exception check box. For Example: A School District could have a Reporting Template for all students in all buildings, in grades K thru 5 and an Exception Template applicable to one building in grades K thru 5. Since the one building is setup as an exception, the grade key for that one building would take
precedence over the one assigned to all buildings. If a student is in grade K-5 and also in the building specified in the Exception Reporting Template, the Exception Reporting Template would be chosen.

To create an Exception Template, simply click the Exception check box when adding a template. The template will display under Exception Reporting Templates. Then click the appropriate icons to create reporting periods and student filters (Buildings and Grade Ranges) as explained in the previous section.

To edit or delete a reporting template, click the large pencil or the deletion icon (as appropriate).

*Note: Reporting Templates cannot be deleted if they are in use in a student’s progress reporting.

PROGRESS VALIDATION

Progress Validation options will allow the District on a global level to enforce rules that will be run when the user finalizes a Progress Report.

- Require at least one progress item for every goal – When this item is checked, the Progress Report cannot be finalized unless each goal has at least one progress key item selected (not a note).
• Require at least one progress item for every goal for students with Alternate Assessments (Ohio only) – This validation only applies if the student is participating in Alternate Assessments, as illustrated in the screenshot below. When this validation is selected, the Progress Report cannot be finalized unless each objective has at least one progress key item selected (not a note).

• Require at least one progress item for every objective – When this validation is selected, the Progress Report cannot be finalized for the student unless each objective included in the report has at least one progress key item selected (not a note).

REPORT OPTIONS

Report options allow the selection of default printing options for progress reporting. The following options are available.

• Reporting Mode: There are two options within this section. a) Historical option will print all locked (i.e., finalized) reporting periods. b) Current Period will print only the most recently locked period based on an “As of Date” specified during the time of printing. When printing using the Current Period option, it is recommended to select an ‘As of Date’ equal to the period end date for the report being printed.
• Staff Printing: Several options are available that control printing (or not printing) of staff name and position.
• Print Category, Subcategory and level of information. If checked, this option will enable printing of the Category, Subcategory and Level for goals and objectives that were selected from a Goal Book, if applicable.
• Print Goals/Objectives with ‘Not Addressed’ checked – prints ‘Not Addressed’ after a goal or objective that was marked as not addressed. The ‘Not Addressed’ verbiage is configurable (see Screen Configuration Options).
• Print Goals/Objectives Date Ranges – prints the date range of goals and objectives on progress reports. Verbiage is configurable (see Screen Configuration Options).
• Auto Number Statements on Report - enables auto numbering of printed progress reports – use ONLY IF IEP does not have code numbers. *Note: If this option is ON (checked), the ‘Display codes
for Non-Transition Goals’ option should be OFF (unchecked) under Options > Manage Progress Reporting > General Options.

**GENERAL OPTIONS**

- Display Codes for Non-Transition Goals (web form and report) – select this option to display/print goal numbers from the IEP on progress reports. Implementations that do not include numbering of goals and objectives within the IEP form itself may want to auto-number progress reports (see Report Options).
- Report Progress on Transition Goals – if your district wishes to report progress against Transition Goals, check this box. Any Transition goals and objectives will then display for Progress Reporting.
- Display codes for Transition Goals – check this box to print the actual Transition Goal code number on the Progress Report.
- Display ‘Needs’ (web form and report) – where ‘Needs’ are part of the Goals and Objectives section of the IEP, select this option to display/print the ‘Need’, then the Goal, then the Objective, then the Marking Period (Type = Attachment, Category = Marking Period) in progress reports.
- Display 'Not Addressed' option (web form). – provides a way to mark a Goal or Objective as ‘Not Addressed’. If users mark a Goal ‘Not Addressed’, the Objectives also will be marked. The Goal or Objective so marked will be excluded when validation runs.

**SCREEN CONFIGURATION OPTIONS**

- Maintenance, Manage Screen Configuration, Progress Reporting Form:
Change the 'Display Text' field from 'Not Addressed' to something else (effects both the progress reporting web form and report).
Change 'Display Text' field from 'Objective' to something else (effects both the progress reporting web form and report).

- Maintenance, Manage Screen Configuration, Statement:
  
  Change 'Display Text' field from 'Objectives' to something else.

**STEP 4: SECURITY SETUP**

**NEW PROGRESS REPORTING**

In order to control what features of Progress Reporting are accessible to a particular Security Group or individual user, the appropriate check boxes must be checked.

From the Home page, Security area, select Manage Groups or Manage Users. Edit the item and click on the Permissions tab or link. Scroll down to the Progress Reporting section to display the sections of Progress Reporting.

- View – Determines whether the Progress Reporting link is available from the Student's IEP/plan summary screen.
- Progress Reporting Setup
  - Edit – Determines whether the user has access to the “Manage Progress Reporting” link that is on the Home Page under the Options menu.
- Progress Report
- Add – Determines whether a user can create a new Progress Report.
- Edit – Determines whether a user has access to the “Manage this Report” screen.
- Delete – Determines whether a user can delete a Progress Report.

- Reporting Periods
  - Lock – Determines whether a user can lock a period on a Progress Report and whether a user can exclude a reporting period from a report.
  - Unlock – Determines whether a user can unlock a period on a Progress Report. This permission also allows a user to re-include a reporting period.
  - Revise – Determines whether a user can modify a student’s existing Progress Report (i.e., add additional progress periods, remove progress periods). Once a user modifies an individual student’s progress report, any changes to the template that was used to create the progress report will not filter down to that student’s progress report, as it now marked as ‘Manual’.

- Goal/Objective Achievement Status
  - Edit – Determines whether a user can mark a goal (or objective) achieved. No further progress is required on these items.

- Progress
  - Add – Determines whether a user can enter progress for a student.
  - Edit – Determines whether a user can edit progress they entered for a student.
  - Delete – Determines whether a user can delete progress they entered for a student.

- Other’s Progress
  - Edit – Determines whether a user can edit progress entered by others.
  - Delete – Determines whether a user can delete progress entered by others.

- Goal/Objective Not Addressed
  - Edit - User with restricted access will not see this field on the progress reporting web form.

- Report Progress on Unlocked Forms
  - Checking this box allows the user to report progress (the Progress Reporting link will be visible) on unlocked forms (forms that were finalized and then revised).
  - Note: users will not be able to report progress on new IEP’s that have yet to be finalized.

LEGACY PROGRESS REPORTING

The Progress Reporting link illustrated in the screenshot below (located on the student toolbar) will no longer be applicable when using the new Progress Reporting utility.

To remove the Progress Reporting link from the student toolbar (as illustrated below), go to Security (Users/Groups), Permissions, Students area, Program – Progress Reporting and uncheck the Edit box.
To remove the Progress Reporting link from the Utilities menu (as illustrated below), go to Security (Users/Groups), Permissions, Utilities area, Progress Reporting and uncheck the Edit box.
PROGRESS REPORTING AUDIT EXTRACT

A Progress Reporting Audit feature is available from the Advanced Reporting menu (Reporting > Advanced Reporting > Progress Reporting Audit). This feature provides the ability to export Progress Reporting information into an Excel file that the district can then filter and sort. All forms that report Progress are included in the extract (IEP, 504, Gifted IEP, Service and ISP plans). For more information, navigate to the Progress Reporting Audit Report in Advanced Reporting and click the Docs button.

TROUBLESHOOTING

User is unable to create progress report and is receiving the following error message, after clicking on the Progress Reporting link.
First, check to see if the student has a Building and Grade assignment within the date range of the IEP. Some states keep this information in the student’s Enrollment record (e.g., Ohio) while others maintain this information in the Placement record (e.g., Delaware).

If the student’s records are correct, go to Options > Manage Progress Reporting and ensure that at least one Reporting Template includes the student’s Building and Grade, as well as appropriate Reporting Periods within the IEP date range. See section on Reporting Templates in this guide for more information.
4/21/14:
Added a new item to the security area called 'Report Progress on Unlocked Forms'.

11/18/2013:
Common Errors section added.

6/4/2013:
Reporting Templates and 'Printing of Not Addressed' sections revised.
Progress Reporting Audit section added.

5/20/2013:
Manage Progress Reporting, General Options, 'Display Needs', 'Display Not Addressed' and 'Display Codes for Non-Transition Goals' added.
Report Options, 'Print Goals/Objectives with Not Addressed', 'Print Goals/Objectives Date Ranges' and 'Auto Number Statements' added.
Screen Configuration Options added.
Security, Edit option for 'Not Addressed' added.

9/27/2012:
Added additional explanation to the "STEP 1: CODE TABLE SET UP" section to explain how the Organization values also affect what is able to be chosen in the 'Grade Range' slider in the 'Edit Template Student Filters' screen.