Getting Started in E-Com©

A Guide to Common Procedures & Best Practices in E-Com
v6.8

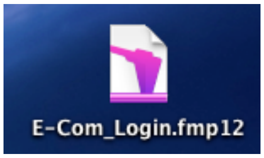
Special Education Forms and
Data Management System for
Washington State

Website: http://ecomforspecialed.com/

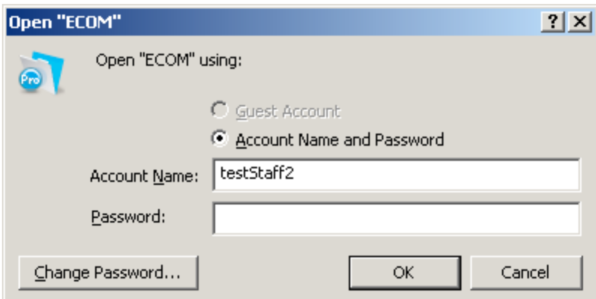
Portage Bay Solutions

Chapter 1: Staff Screen

Login



Find the E-Com login icon on your hard drive; it will generally be on your desktop and will be named something similar to the one shown. Double-click on it.

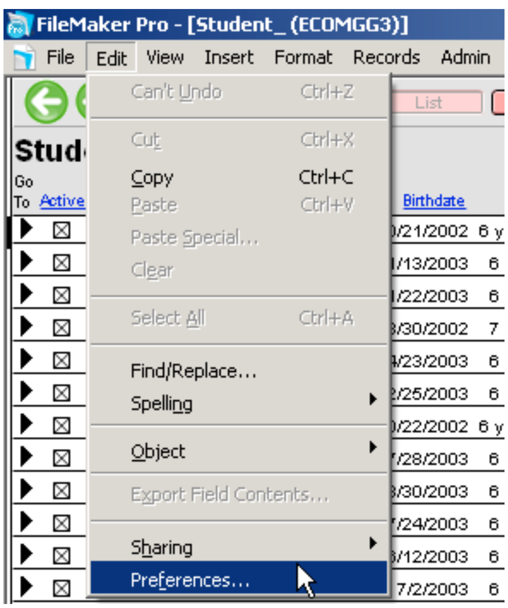


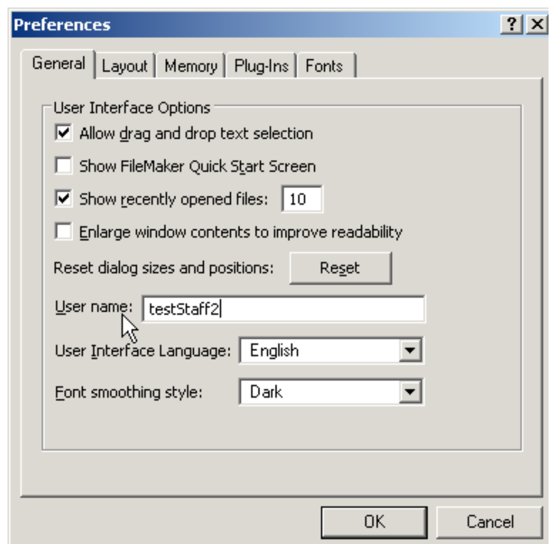
The E-Com Login screen will appear.

Enter the user name and password assigned to you by the system administrator and click OK.

IMPORTANT: **Do not** click the ***Change Password*** button if you want to change your password. Instead, see ***"Edit Login/Password"*** for instructions.

Setting Account Name for Login





It is probable that your E-Com account name will not appear correctly in the dialog box. To change this, select 'Preferences' from the Edit menu.

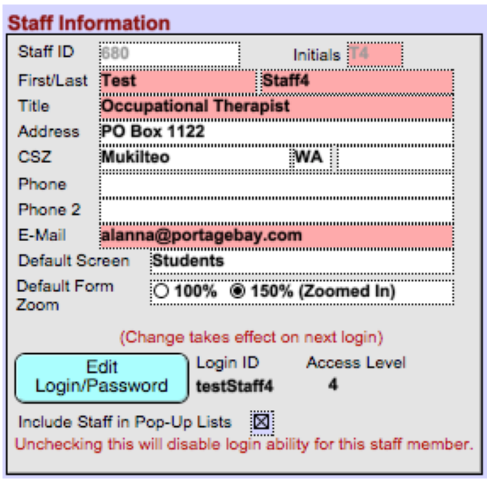
Note: If using a Mac, Preferences is available under "FileMaker Pro" rather than "Edit."

Enter your E-Com user name into the ***User Name*** field. Once you've done this, the dialog box will open with your E-Com user name already filled in. This needs to be done on each computer you log into E-Com with.

Staff Screen

Upon login, users go directly to the staff screen. Most of the functionality and information below needs to be set up once, when you first log in. Fields may be edited as required.

Information & Settings



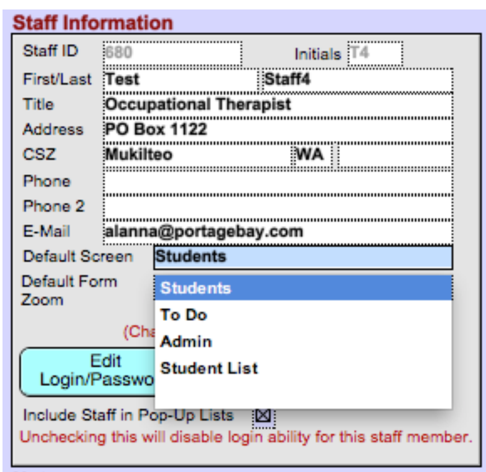
We recommend that the fields in red* in the image to the left be populated for all users. Other fields are optional.

If your district uses SIS imports and imports case manager names (ask your E-Com administrator or district secretary), the Staff ID field should be filled with your staff ID from Skyward in order to properly match up your assigned students.

Note: If you enter a phone number in the Phone field, it will auto-populate to some forms. ***Do not use the Phone field for home phone numbers*** unless it is your district's policy to give out home phone numbers.

** Fields highlighted in the image to the left are NOT highlighted within the application itself.*

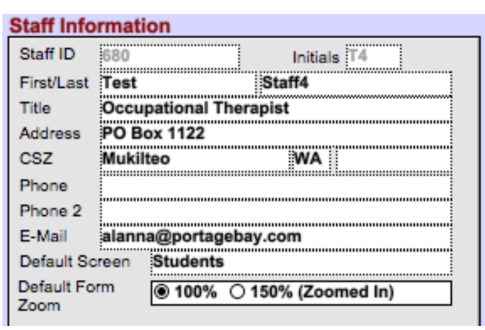
Default Screen Settings



Choose an option from the Default Screen drop-down to set your preferred default tab for when you log in. Most staff use the "Students" screen as the default, as it allows for easy access to student records.

Note: If you have an outstanding To Do item, that tab will take priority over your default tab.

Default Form Zoom Settings

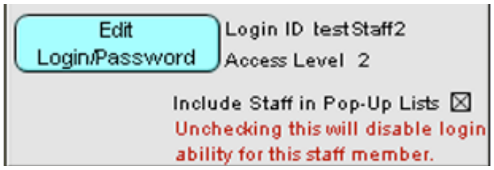


You have the option to choose either the 100% (Normal) or 150% (Zoomed In) option to set your preferred zoom level for forms.

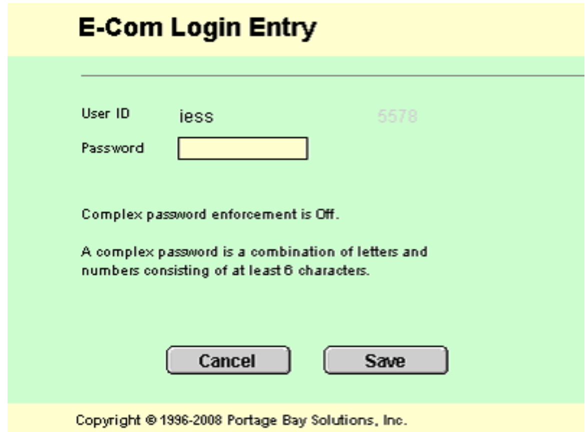
The change will take place upon your next login.

*Note: This works only for **forms**. For all other screens, you will need to use the zoom option at the lower left of the window (to the left of "Browse").*

Login Settings – Editing Your Password



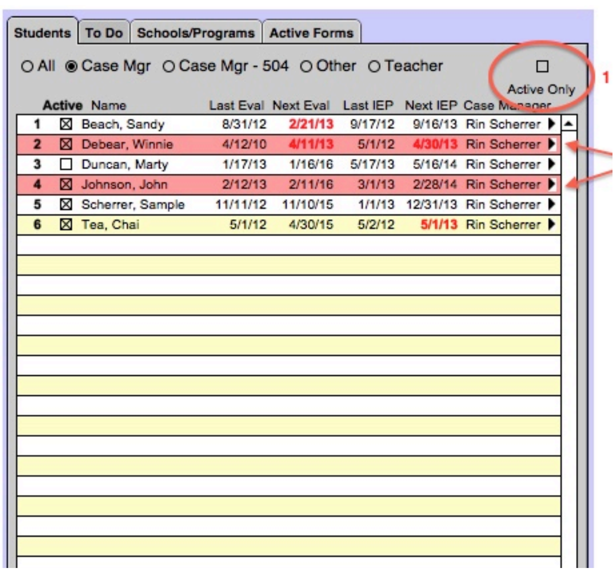
From the ***Staff Information*** area of the Staff screen, click on the ***Edit Login/Password*** button.



The E-Com Login screen will pop up. From here, you may type in and change your password directly.

Once you have finished, click “Save.” You also have the option to cancel the change.

Students Tab – Staff Roles



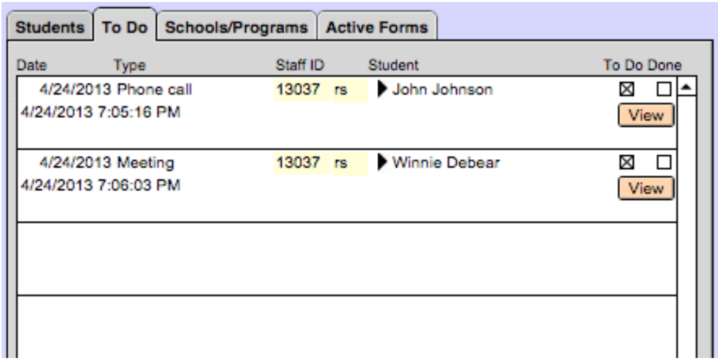
Note: Eval and IEP dates may be in color. Red means the IEP or Eval date is due or past. Green means it is coming up. Yellow means the student may need a 3-yr or 9-yr (DD) evaluation.

The ***All, Case Mgr, Other*** and ***Teacher*** buttons on the Students tab show the students assigned to you in those roles. Selecting the ***Case Mgr*** button shows the students for whom you are the case manager; the ***Other*** tab shows the students for whom you are the SLP, OT, PT, etc.

1) ***Active Only*** checkbox - When this box is checked, only your active students will be displayed. If you wish to see inactive students, uncheck the box.
2) Row highlighting means that the student has an open “***To Do***” item on his Notes tab. Once this note is marked as done, the highlighting will go away.

Staff may access student records from this list by clicking on the student name.

To Do Tab



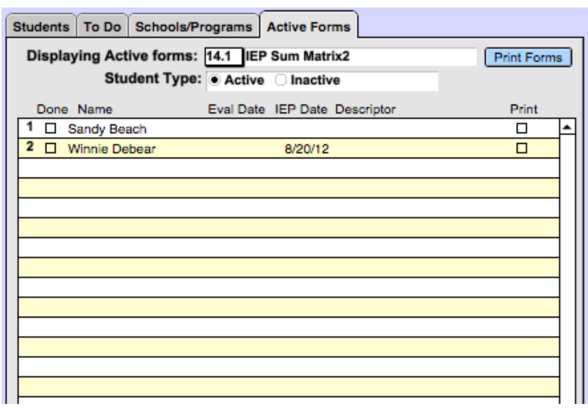
If you have an open To Do item on any student, your staff screen will open with the To Do tab displayed. These items are set on the student ***Notes tab***.

When you mark all items as done, your usual default screen will reappear.

The ***View*** button will take you to the Notes details screen.

Active Forms Tab

This tab gives users quick access to specific forms for the given staff member's student load; it is most useful for pulling up progress reports that need completing.



To **View Forms**:

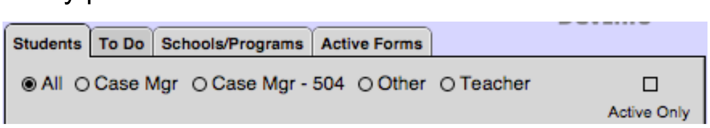
- Select the form you want from the drop-down list next to "Displaying Active forms:"
- Choose the Student Type (active or inactive).
- Students with that form in their records will appear in the list.
- Click the student name to view the form.
- To return to the active forms tab from the form, select "Go to Staff" from the Forms Options menu along the top of the window.

To **Print Forms**:

- Select the Print checkbox for one or more student forms.
- Then select the **Print Forms** button.

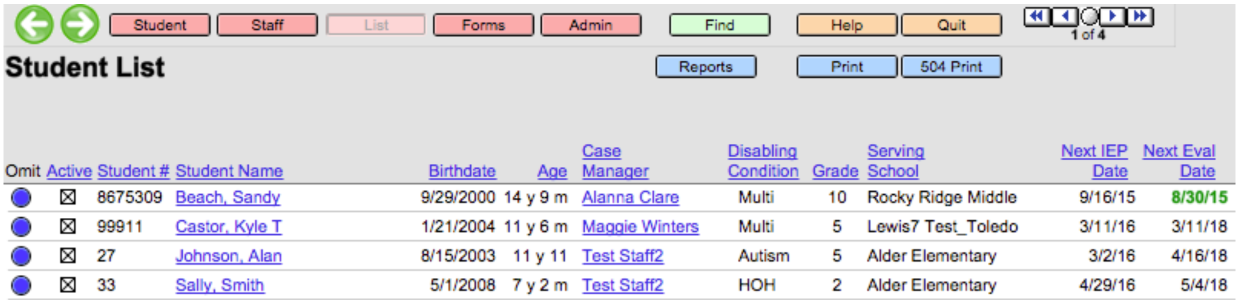
"My Students" Button

At times, it is useful to sort or generate reports on the groups of students you manage. You can easily produce a list of either active or of all students who are assigned to you, based on role.



To do so, select any one of the staff role buttons. If you want both active and inactive students, uncheck the "Active Only" checkbox at the right of the staff tabs. Then click the ***My Students*** button at the bottom of the tabs on the Staff screen.

The Student List for the tab selected will be displayed as shown below.



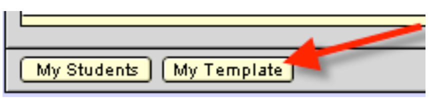
Omit	Active	Student #	Student Name	Birthdate	Age	Case Manager	Disabling Condition	Grade	Serving School	Next IEP Date	Next Eval Date
●	☒	8675309	Beach, Sandy	9/29/2000	14 y 9 m	Alanna Clare	Multi	10	Rocky Ridge Middle	9/16/15	8/30/15
●	☒	99911	Castor, Kyle T	1/21/2004	11 y 6 m	Maggie Winters	Multi	5	Lewis7 Test_Toledo	3/11/16	3/11/18
●	☒	27	Johnson, Alan	8/15/2003	11 y 11	Test Staff2	Autism	5	Alder Elementary	3/2/16	4/16/18
●	☒	33	Sally, Smith	5/1/2008	7 y 2 m	Test Staff2	HOH	2	Alder Elementary	4/29/16	5/4/18

Sorting Students

The default sort order is by Next Eval Date, so students with the closest next-due evaluation date will appear at the top (note any color coding). If you click on any of the blue headers, you can sort the list by that header. The blue circle may be used to omit the associated student name from the list.

If you wish a report on the students found, you can click on the Reports button at the top of the screen, and select the report you want. Most reports can be viewed, printed, made into PDFs, or exported as Excel data.

"My Template" Button



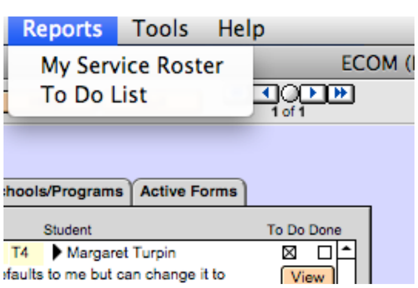
It is very common in E-Com for a staff member to have a sample student record where they create forms and batches for practice purposes and where they can set up forms for later duplication and reuse. To quickly and easily access your template/practice student area, click the ***My Template*** button at the bottom of the tabs on your staff screen.

Creating a Default Template (Practice) Student

If you don't already have a template student, E-Com will offer to create one for you when you select the ***My Template*** button. This will automatically create a new student entry with a ***first name*** of "Sample" and the ***last name*** of the logged in user, including default settings for Student # and Case Manager fields. Once created, you can practice actions (adding, deleting, duplicating forms and batches, etc.) and set up forms and batches for later use with actual student records.

Additional Staff Screen Features

Print Shortcut - To Do List/Service Roster



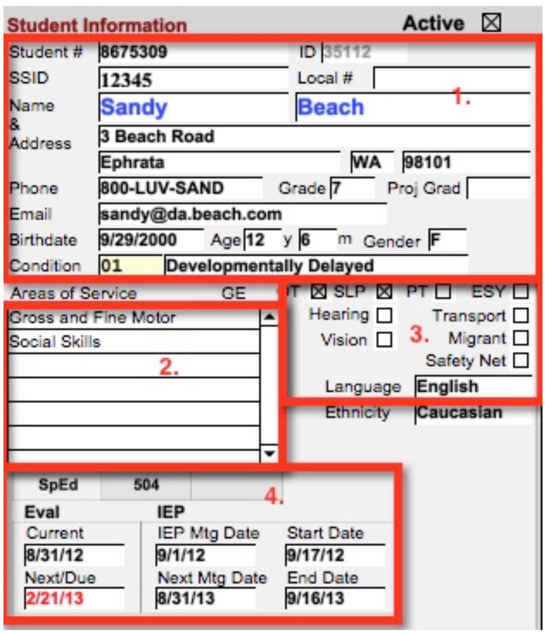
To print the contents of the ***To Do tab*** in a list format, select the ***To Do List*** menu item shown.

Select ***My Service Roster*** to get a copy of your assigned students and minutes, if your district uses the 14.1 form as the summary of services matrix. You may also print, email, or export the roster to an excel document.

Chapter 2: Student Entry Screen

The Student Entry screen is where all the information for a student is entered and stored.

Information & Settings



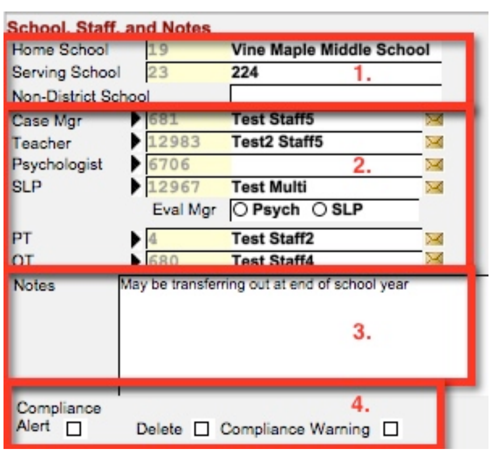
1) **Demographic data** – address, phone, "Active" status, disabling condition, language, etc.
2) **Areas of Service** – the services defined* for the student.
3) **Keyword classifications****
4) **Eval and IEP dates**

* Areas of services are entered via varying processes. Please check with your Special Ed secretary for further information.

** Use of these checkboxes varies by district, so check with your Special Ed secretary for further information.

Note: Some districts import data nightly from the school's Student Information System (SIS). If your school uses imports, many changes made manually on the Student screen will be overwritten by the data imported from SIS. Check with your E-Com Admin to know which scenario applies to your district.

School, Staff and Notes Settings



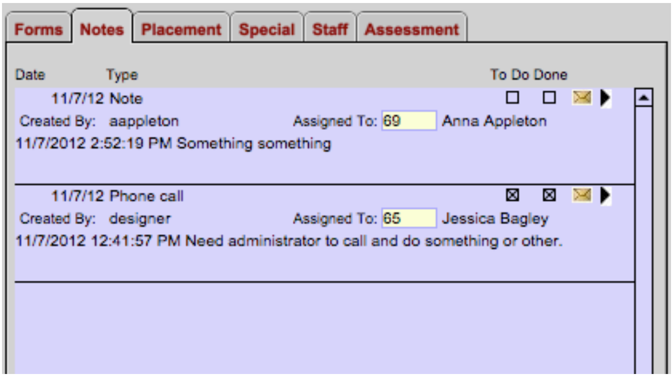
1) **Schools**: Schools associated with the student.
2) **Staff:** Case managers and other assigned staff. Selecting the triangle next to any of the staff assignments will take you to that person's staff screen. Staff members may also be emailed using the envelope icon, if your district uses that function.
3) **Notes:** This field can be used for notes of any kind.
4) **Alerts & Warnings:** Displays alerts and warnings; mostly used by district administrators.

Parent Information

The **Address to Print** popup menu allows you to select the address to use on envelopes for the student, or on certain forms that fill in the student address. It also changes the salutation used.

Notes Tab

This tab serves as the case note management screen. Use of this tab varies by district.



1) **Add a Note or "To Do:"** Selecting the ***Add Note*** button adds a note, assigned to the logged-in user by default. It can be re-assigned by clicking in the small yellow "Assigned to" box.

2) **Note Types:** Classifications include: note, meeting, email, phone call. You can use any of these preset note types or create customized ones.

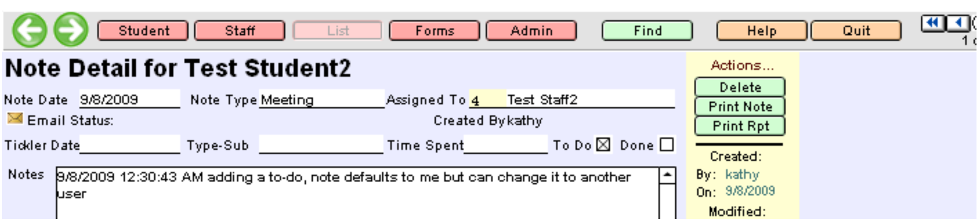
3) **'To Do' Feature:** Clicking the ***To Do*** checkbox and selecting a staff member from the ***Assigned To*** drop down box assigns the "to do item" to that staff member. This causes the note to appear on the ***To Do tab*** of their Staff screen and will also highlight the student's name in red on the appropriate ***Roles tab***, indicating that there is an open "to do" item for that student.

   Note: When the staff person logs in or returns to their staff screen, E-Com will display the ***To Do tab*** until the respective note is marked as "done" via the ***Done*** checkbox.

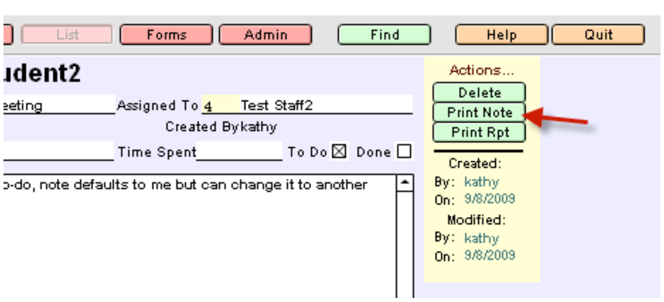
4) **Viewing Note Details:** The first few lines of the note details are previewed directly on the ***Notes tab.*** Clicking the black triangle on the right side of each note displays the ***Note Detail Screen*** with the entire note contents.

Notes Detail Screen

The Notes detail screen allows users to view the complete details of a particular note. For added convenience, extra fields such as 'Tickler Date' and 'Time Spent' are provided. From this screen, users can delete or print notes or create and print reports.



Print Student Notes



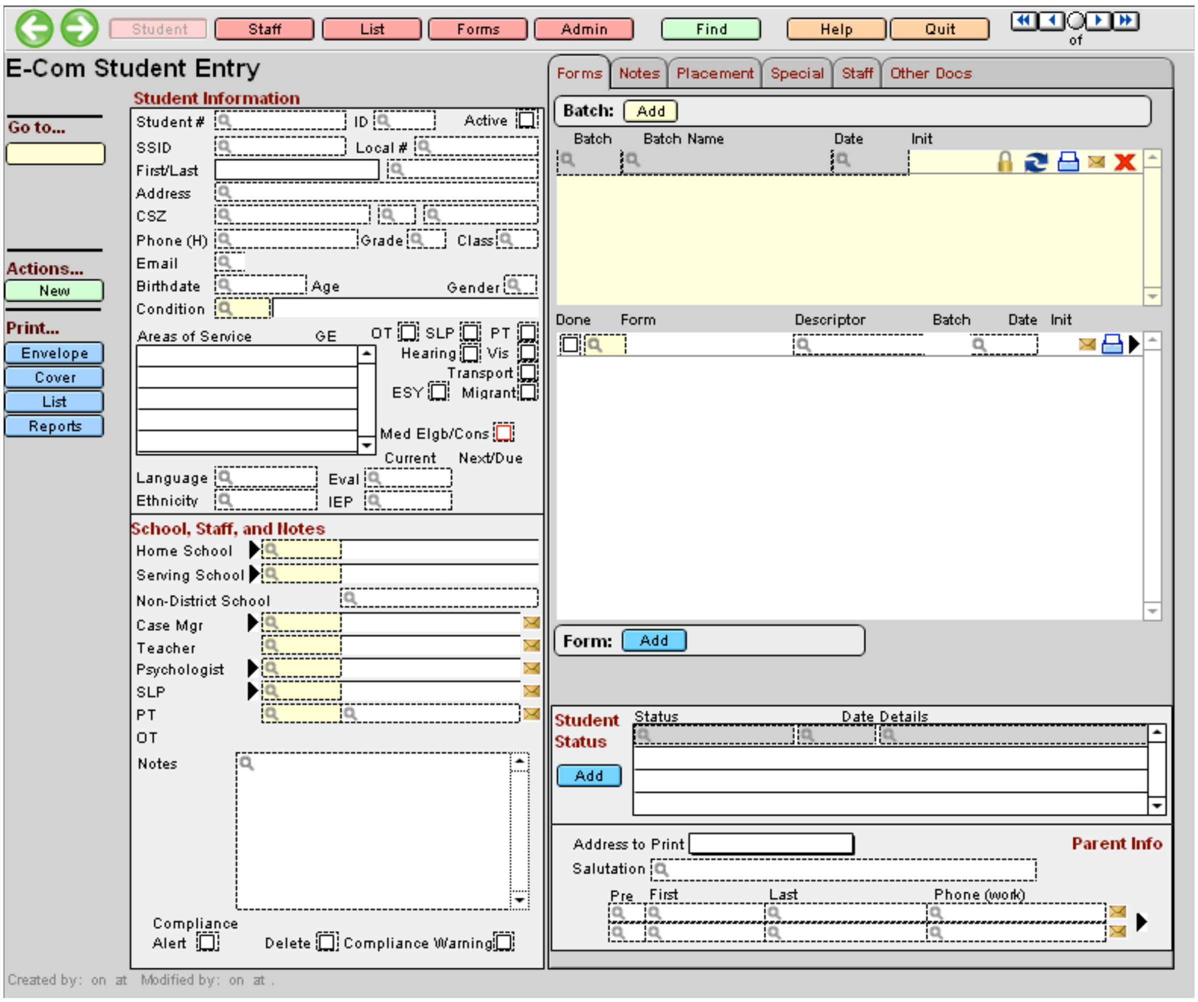
The ***Print Note*** button allows you to print the note for the paper file.

The ***Print Rpt*** button allows users to first perform a find and then print the found set of notes in a report format.

Find a Student

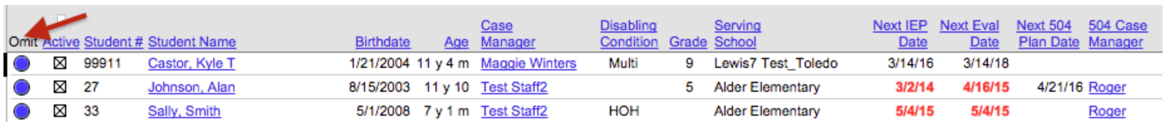
The easiest method to reach a student record is to click on the student name in the list appearing on your staff screen. This will take you directly to that student record. However, sometimes you want to find a student when you are already in the Student section. In that case, click the ***Find*** button on the top Navigation Bar. The Student screen will display a magnifying glass in all the fields a user can search (see image below).

Note: Use care when searching for student records. Student names may be overwritten if you do not wait for the search screen to come up. If your district uses the automatic student import to update student records, this error may be corrected the next day, but if your district doesn't import data, it may be some time before the error is discovered, and batches or forms for the incorrect student may be added to the record. Be sure you see the search screen as shown below before you start to type.



Type in search criteria, such as the student's name or number. You do not need to enter the full name, only enough of the first and last name to differentiate the student from others.

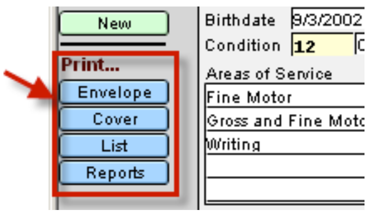
want more than just one, you may omit any you don't want by clicking the blue "Omit" circle. This removes the student(s) from the current list. It does not delete the student record.



Omit	Active	Student #	Student Name	Birthdate	Age	Case Manager	Disabling Condition	Grade	Serving School	Next IEP Date	Next Eval Date	Next 504 Plan Date	504 Case Manager
●	☒	99911	Castor, Kyle T	1/21/2004	11 y 4 m	Maggie Winters	Multi	9	Lewis7 Test_Toledo	3/14/16	3/14/18		
●	☒	27	Johnson, Alan	8/15/2003	11 y 10	Test Staff2		5	Alder Elementary	3/2/14	4/16/15	4/21/16	Roger
●	☒	33	Sally, Smith	5/1/2008	7 y 1 m	Test Staff2	HOH		Alder Elementary	5/4/15	5/4/15		Roger

Additional Student Screen Features

Print Shortcuts



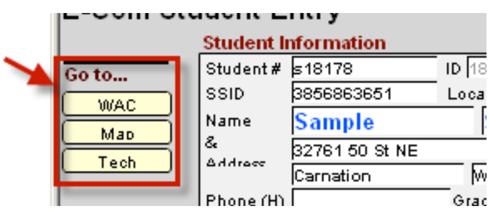
Envelope – This prints an envelope addressed to the parents of the student. The salutation format will be set according to the choice set for the 'Address to Print' field on the ***Parent Information section.***

Cover – Prints a cover sheet that includes the data from the Student Information section, Schools, Staff Assignments, Parent Information and Areas of Service.

List – Prints a list view with high level data about the student.

Reports – Sends the user to the ***Reports*** screen. In addition to a number of reports based on code, grade, age, case manager, etc., you will also find a button that allows you to print labels in 5160 format, with a choice of 1 or 3 labels per student. Salutation on these labels may be changed in the same way as on the envelopes above.

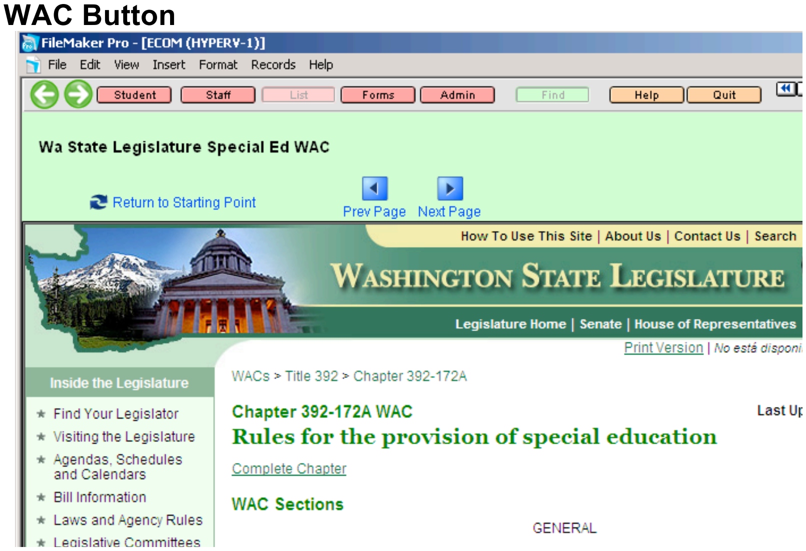
Website Shortcuts



From the "Go To" buttons you can access:

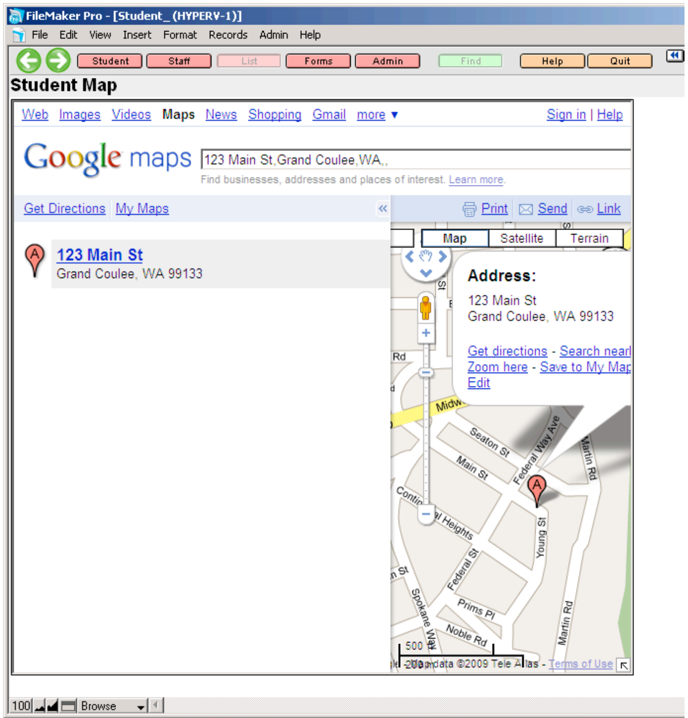
- The Washington Administrative Code (WAC)
- Google map linked to the student's address
- OPSI IEP Technical Assistance Module website

WAC Button



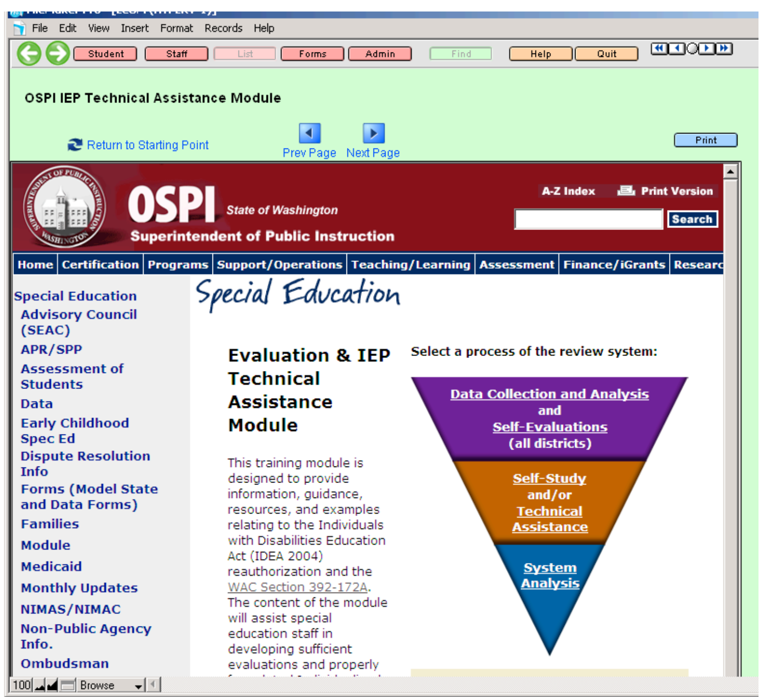
The 'WAC' button displays the screen shown. The special education WACs are not stored in E-Com: the state's WAC web site is displayed in a window within E-Com. This insures that the WAC information in E-Com is never out of date.

Map Button - Google Map of Student Address



The Map button displays the Google map web site with the student's address mapped. From within E-Com, you can perform all the Google map actions you could normally use directly via a web browser.

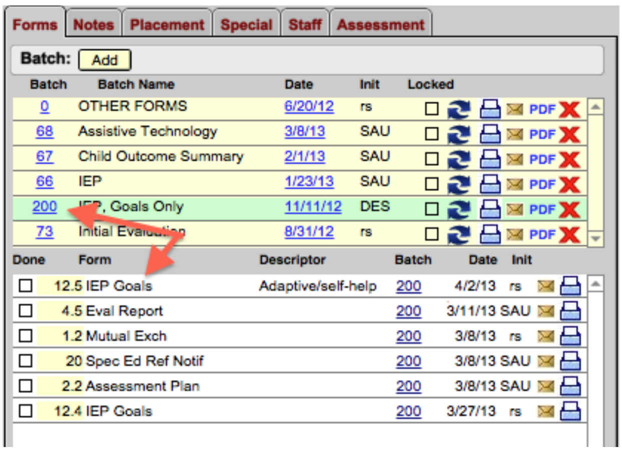
Tech Button – Tech Module Website



Chapter 3: Working with Forms and Batches

Batches are groups of individual forms pre-defined by your E-Com system administrators. Grouping forms into batches allows for faster navigation and better organization of commonly used forms. Typical batches in E-Com include *Initial Evaluation*, *Re-evaluation*, *IEP*, etc.

Working with Batches

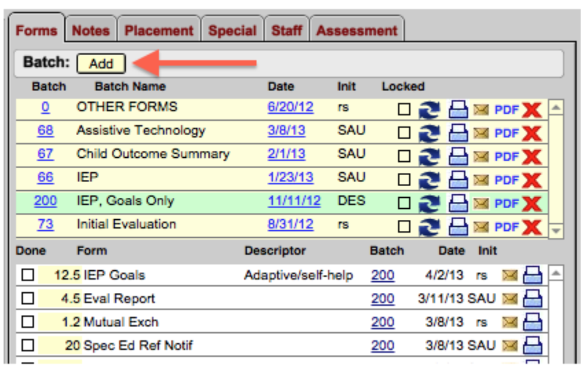


The ***Batch List*** displays all batches that have been added for a particular student.

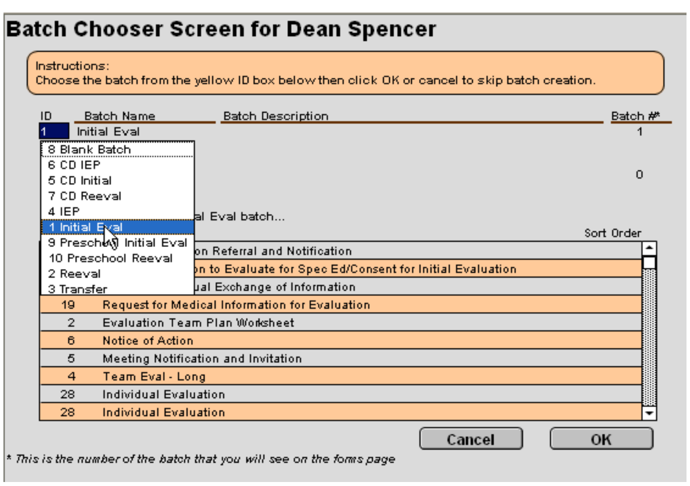
Clicking on a batch number highlights that batch row in green and displays all forms for the batch in the ***Forms List*** section.

Any form not associated with a particular batch should be added to the ***"OTHER FORMS"*** batch.

Add a Batch



From the Forms tab on the Student Screen, click the ***Add*** button to display the ***Batch Chooser screen***.



From the ***Batch Chooser*** screen, select a batch from the list. The forms in the batch are listed in the orange & gray rows displayed.

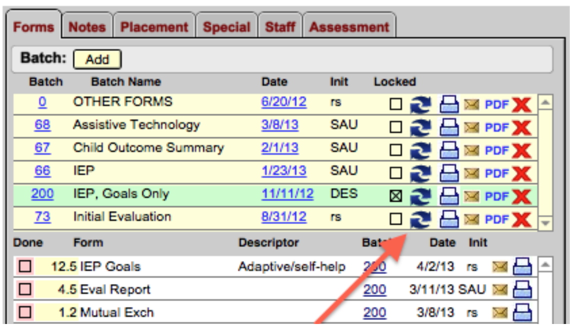
Note: If the student already has an IEP or Eval batch within the 1 or 3 year time frame, when you add another, you will have to confirm the addition of that new batch.

Your district's system administrator is responsible for batch management.

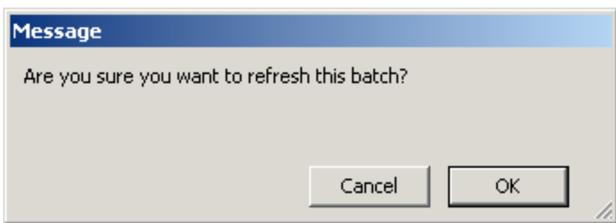
Refresh a Batch

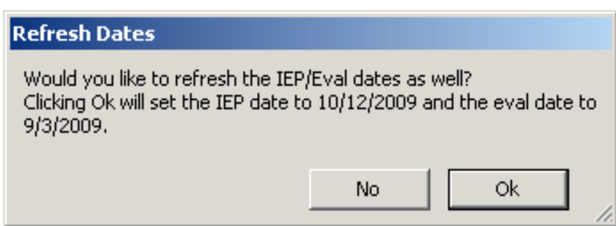
In E-Com, student data auto-fills the appropriate fields on a form when a batch is added. ***If that student information later changes*** (for example: a disabling condition is assigned, a birthday passes, the IEP date or grade changes, etc.) ***the data on previously added forms may be incorrect***. You may use the refresh function to update this information.

Note* - Be careful when refreshing.** If your district does not lock completed batches, users can inadvertently change completed forms (e.g., evaluation forms from 3 yrs ago, last year's IEP, etc.) so ***be sure you have selected the intended batch before refreshing. If forms inside the selected batch are marked as completed, or are locked, you will not be able to refresh the batch.



Click on the blue ***Refresh*** icon to refresh a batch.





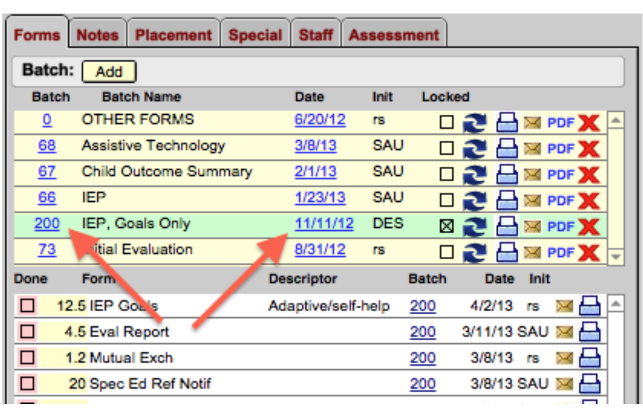
The following dialog boxes will come up, one after the other.

The first allows you to cancel or continue.

The second allows you to update the student data without refreshing the IEP or evaluation dates.

If you decide to refresh the dates, check those listed in the "Refresh Dates" dialog carefully to make sure they match what you want to use in the form.

Edit Batch Dates – Set the IEP or Eval Dates for Forms in Batches

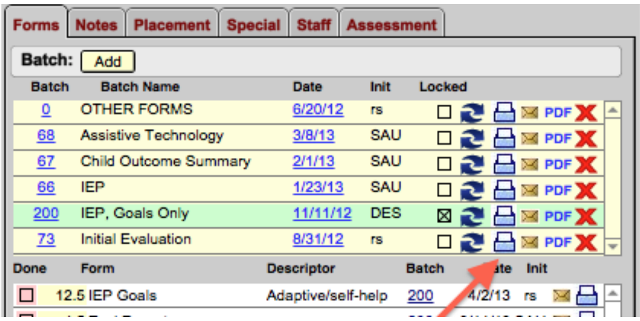


You can set or reset the IEP and Eval dates on all forms in IEP / Eval batches.

1) Select the batch number for the batch you want to change. The batch selected will be highlighted.

2) Click on the batch date field and enter the new date. Once you click OK, the new date will appear as the IEP or Eval date for all forms in the batch.

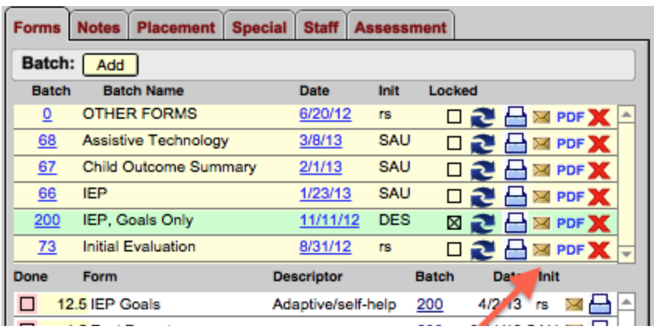
Print a Batch



Click the blue printer icon to print forms. You will be given the option of printing all forms in the batch or only those marked as done'.

Note: If the batch contains a form 90 with an external document, you will need to open and print that document separately. A warning page to this effect will appear in the printout.

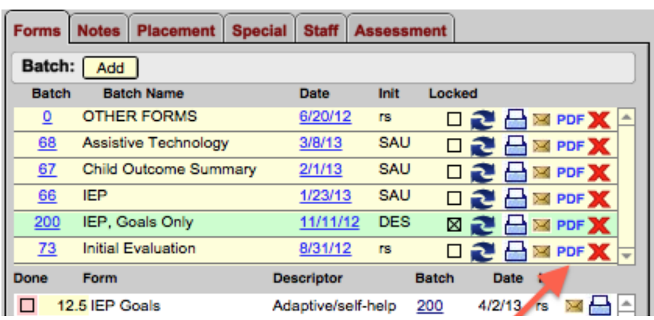
Email a Batch



Click the ***Email*** icon to email all forms in the batch (as a PDF) to any email recipient. You will be given the option to email all forms in the batch or only those marked 'done'.

Documents contained within a form 90 will need to be handled separately.

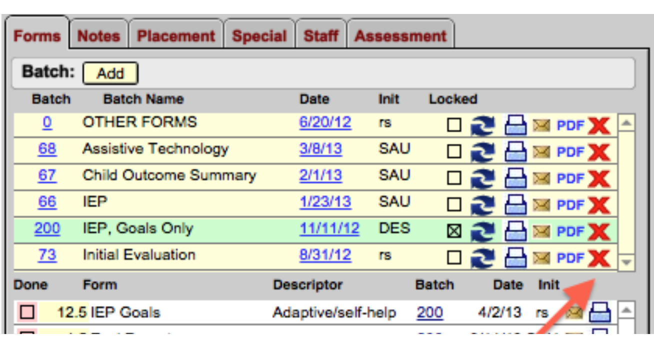
Create a Batch PDF



Click the ***PDF*** icon to create a PDF of the batch. It will be stored in your "My Documents" (Windows) or Documents (Mac) folder. If you don't know where this folder is, please check with your local E-Com administrator.

Documents contained within a form 90 will need to be handled separately.

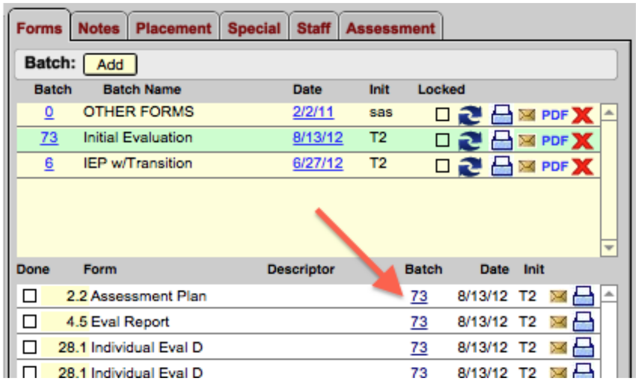
Delete a Batch



To delete a batch click on the Red **X** (the ***Delete*** button).

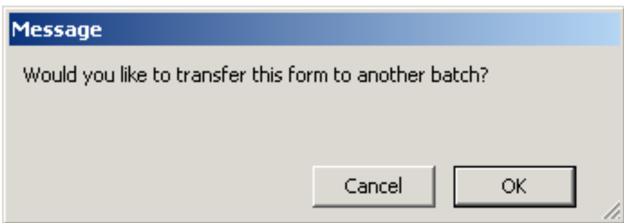
You can only delete batches that you created. Admin staff may be able to delete other batches for you, if needed.

Move Forms from One Batch to Another

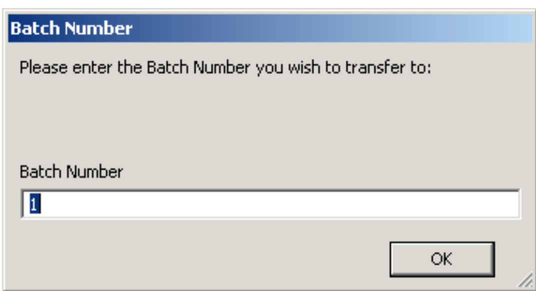


Select the batch where the form currently is. Click on the batch number in the ***Forms list***.

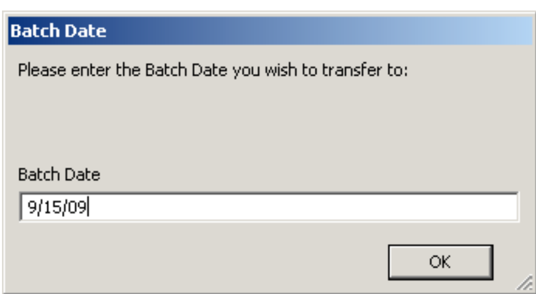
After clicking the number, users will see the series of dialogs shown below.



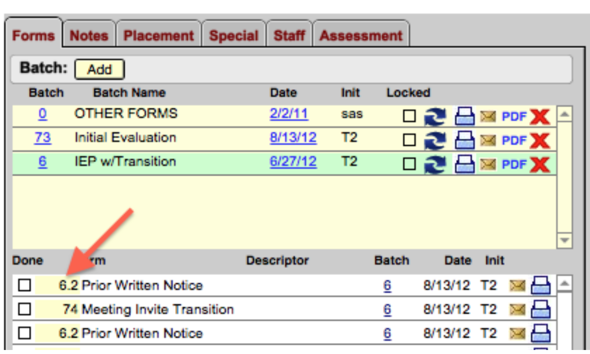
Confirm that you intend to move a form.



You will be asked for the batch number to which you wish to transfer the form. This batch number can be found in the first column of the batch view.



Finally, provide the batch date. Students may have more than one batch with the same batch number. The date is needed to ensure that the form ends up in the intended batch.

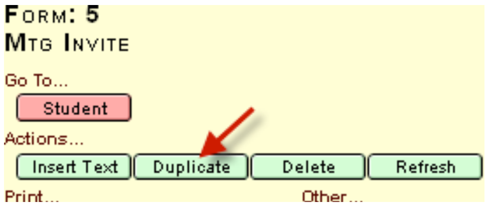


The form will then be shown at the top of the forms listing for the destination batch.

Note: You can only move one form at a time.

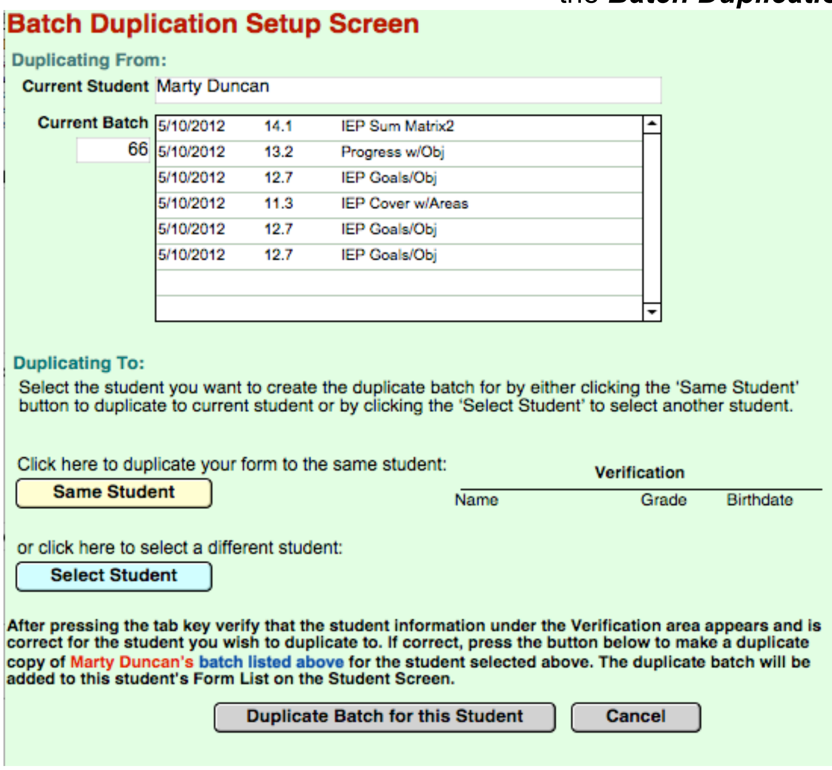
Duplicate a Batch

You can duplicate a batch to the same or to a different student. Many staff set up an initial batch on their template student to duplicate to each new student, for instance.



Open a form within the batch you want to duplicate. Click on the ***Duplicate*** button from the Form Navigation bar.

A dialog will appear; select Batch to duplicate the entire batch to which the form belongs. This will open the ***Batch Duplication Setup Screen*** shown below.



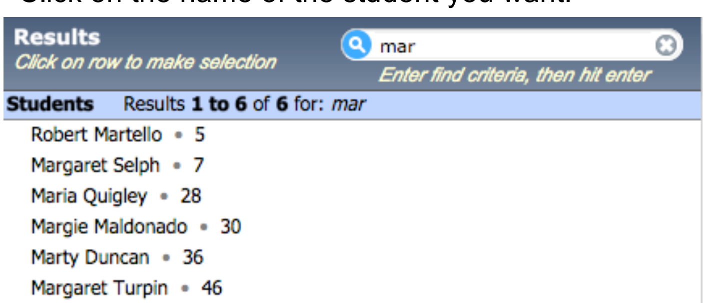
This screen shows the forms in the batch being duplicated. Select the "Same Student" or the "Select Student" button, depending on whether you want to duplicate the batch to the current student record or to a different one.

If you click "Select Student," a search screen will come up to allow you to find the correct student record.

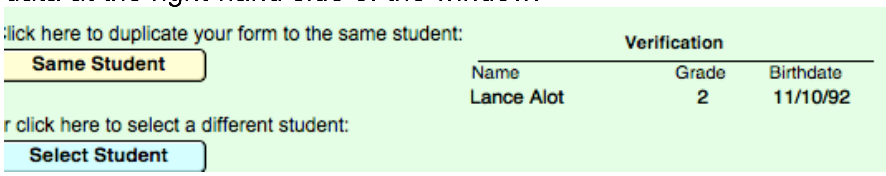
Enter at least 3 characters of the student's name in the top line, by the small blue magnifying glass.

The student name, student number, and SSID will be displayed; if the student is not currently active, that will be noted as well.

Click on the name of the student you want.



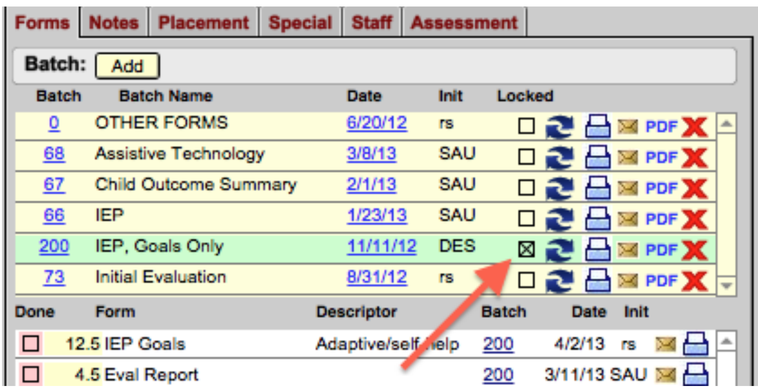
1) Once selected, verify that you have selected the correct student by checking the Verification data at the right-hand side of the window.



2) To proceed, click Duplicate Batch for this Student button.

You will be brought to the Student screen of the student to whom the new batch was duplicated.

Locked Batches



Once the forms within a batch are completed, the batch should be locked so that the completed forms are not accidentally changed.

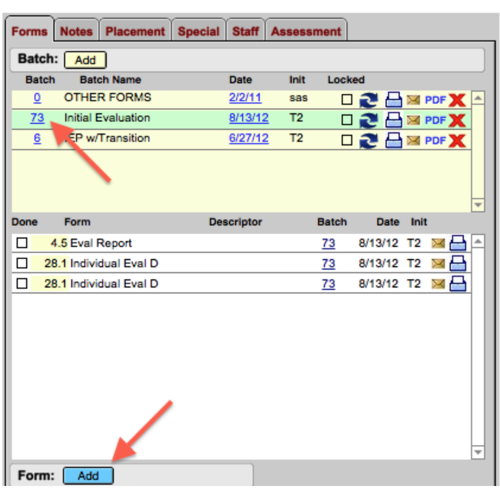
If the batch is locked, the Locked checkbox will be checked in Batch view. Forms that are locked have a red square behind the Done checkbox in Form view.

Forms and batches may be locked or unlocked by Admin users.

Note: If an IEP batch is locked, that batch's progress report forms usually remain unlocked so that progress may be charted over the course of the IEP period.

Working with Forms

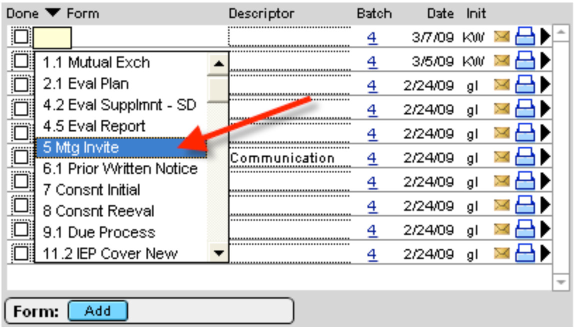
Add a Form



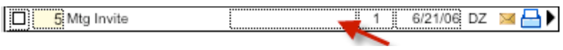
From the Batch list, click the batch number of the batch to which you want the form added.

If you don't want the form to be included with any particular batch, click on the "***Other Forms***" batch.

Click on the ***Add*** button below the ***Forms*** list. This generates a pop-up menu within the Forms listing area.



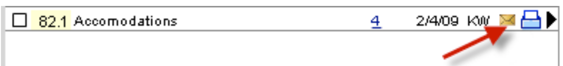
In the pop-up menu, use the mouse to click on the desired form. Use the scroll bar to see all the forms available in the menu.



Once selected, the row will automatically fill in.

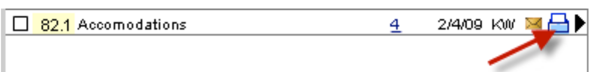
In certain situations, it may be necessary to have multiple instances of the same form. Users can use the ***Descriptor*** field to include additional identifying information about such forms (e.g., semester info on progress reports, second prior written notice).

Email a Form



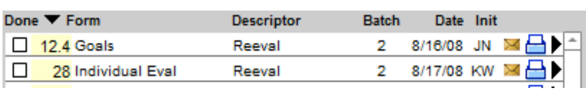
Click the ***Email*** icon to email the form to any email recipient, if this is enabled in your district.

Print a Form

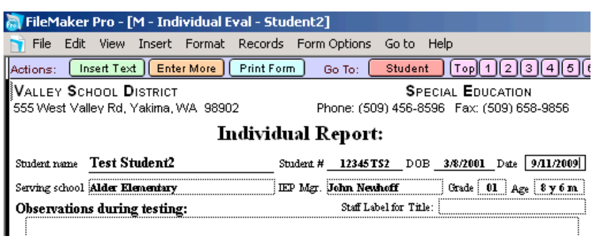


Click the blue printer icon to ***Print*** the form. You can also print a particular form using the Print button in the ***Form Navigation*** area.

Open a Form



Click on the form number or form name to access the desired form.

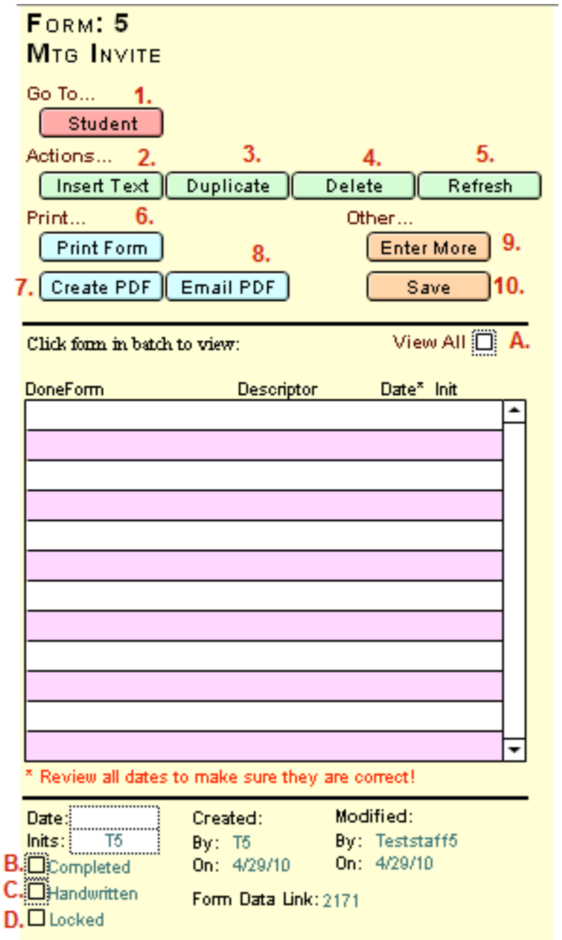


The majority of the fields at the top of each form are already completed. Data from the ***Student Entry Screen*** will be populated directly to the form when the form is added.

You may use the ***Tab*** key to navigate between fields on a form.

Form Navigation

There is a ***Form Navigation*** area on each form; it is in yellow on the right-hand side of every form. On multi-page forms, there is a rolling header with most of the same action buttons.

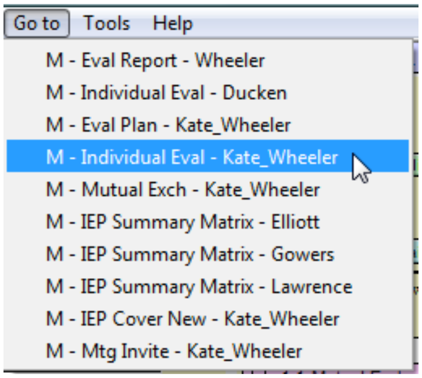


1) **Student** - Goes to the Student Screen for the *student last viewed*. Note: This may not be the same student whose form you are currently viewing.
2) **Insert Text** - Allows users to insert pre-defined text. See "***Using the Text Library***".
3) **Duplicate** - Duplicate forms or batches to a current or different student.
4) **Delete** - Deletes the form being viewed.
5) **Refresh** - Updates the form with the current student data.
6) **Print Form** - Prints the form being viewed.
7) **Create PDF** - Generates a PDF document of the form to a location you specify.
8) **Email PDF** - Emails the form as a PDF.
9) **Enter More** - Allows users to enter more data than fits in a particular field by adding a text section to the bottom of the form.
10) **Save** - When spending a considerable time on a form, users can manually save it. This helps prevent data loss in the event of a power failure or network disruption. *Note: Data is automatically saved when you close a form, go to another screen, or exit E-Com. This feature simply provides extra protection.*

The checkboxes are defined as follows:

A. **View All** – Forms in the highlighted batch are shown in this section; you may select another form by clicking on the name. If you check View All, all the student's forms, from all assigned batches, will be shown, and you may select any of them.
B. **Completed** - Check when the form is finished. This lets other staff know that the form is done.
C. ***Handwritten*** - A check here indicates the form was printed blank and handwritten instead of being completed in E-Com. This functionality is not often used.
D. ***Locked*** - Once locked, a form cannot be edited by anyone except admins.

View Forms Side By Side



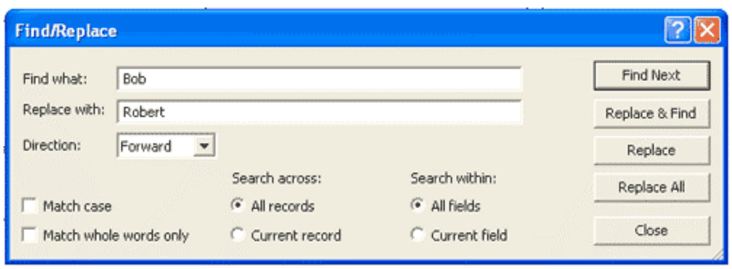
You may view two forms side by side.

1. Open the first of the two forms that you would like to see side by side. Close it.
2. Open the second of your two forms.
3. From the 'Go To' menu, select the form you opened in Step 1.

Your two forms will now be displayed side by side. Clicking on the Student button or leaving either form will close both forms. The last 10 opened forms are available for viewing side by side.

Find & Replace Text in a Form

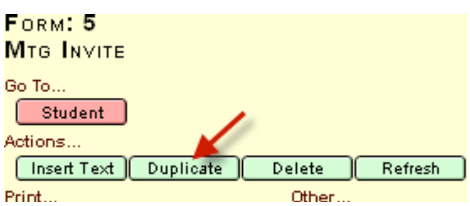
The Find & Replace function can be very useful when correcting an error or updating data on a duplicated form. For example, if you have an evaluation where you have used 'Bob' for the student's name, but you want to change it to 'Robert', you can use the Find & Replace function to do this quickly and easily.



To use Find & Replace, open the form that you'd like to work with and choose 'Find/Replace' from the Edit menu. This will display the dialog below. Simply enter your 'Find' and 'Replace' text and click the appropriate button on the right. It's as easy as that!

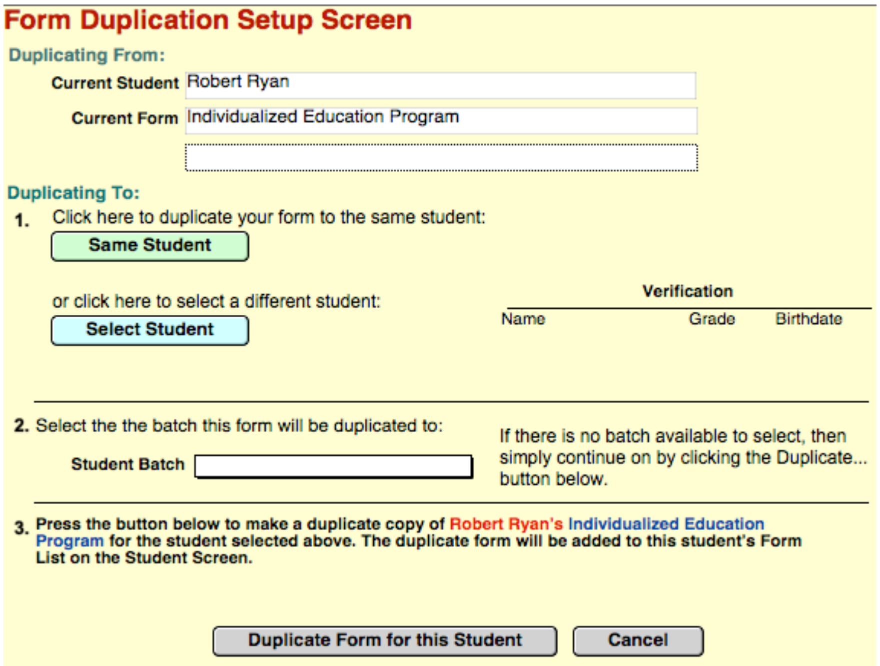
Duplicate a Form

Users can save time by duplicating forms for any given student; for example, by creating a duplicate of a goal form from last year's IEP into this year's IEP.



Open the form you want and click on the ***Duplicate*** button on the Form Navigation bar.

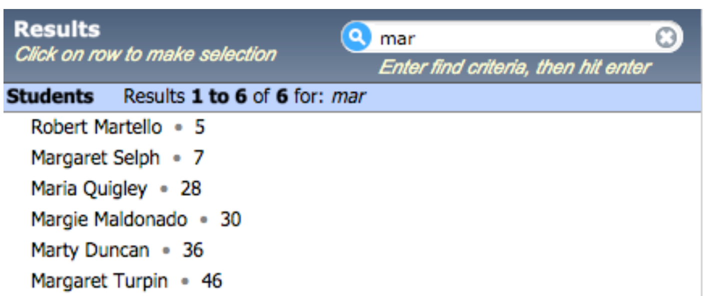
A dialog will appear; select 'Form' to duplicate the form you are currently viewing. This will open the ***Form Duplication Screen*** shown below.



This screen displays the form being duplicated. Select either "Same Student" or "Select Student" to duplicate the form.

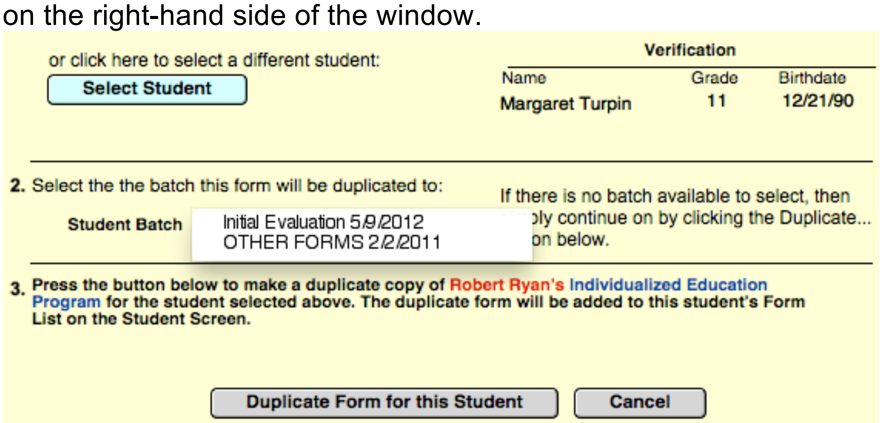
Note: Inactive forms cannot be duplicated.

If you choose the "Select Student" button, you will get a pop-up where you can enter a student name, in full or in part, to find the correct record.



You must enter at least 3 characters in the top line, by the blue magnifying glass. Select the student you want from the list of results by clicking on the student name. The student name, student number, and SSID will be displayed.

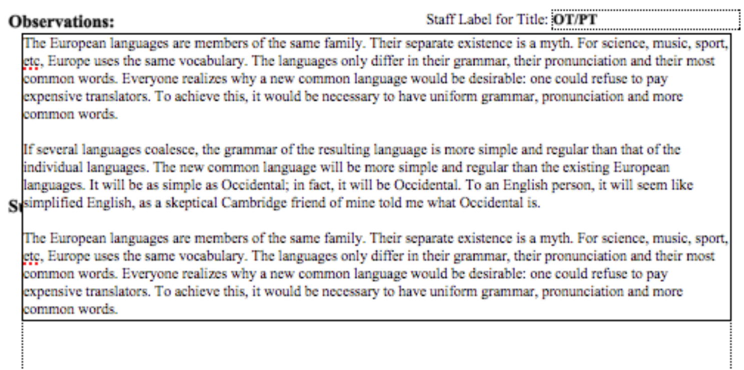
1) Ensure that you have selected the correct student, by checking the Verification data on the right-hand side of the window.



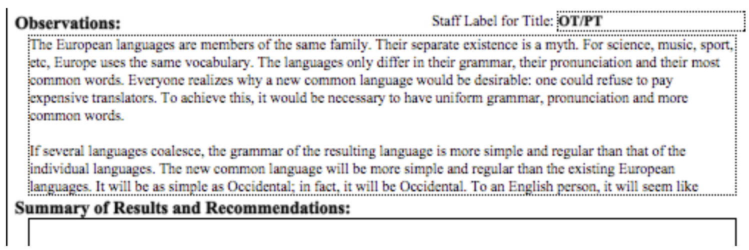
2) If the student you're duplicating to has multiple batches, you must select a batch for this form from the popup menu.
3) Click Duplicate Form for this Student. You will be brought to the student record to which the form was duplicated.

Additional Information Field

Many of the forms in E-Com have an “additional information” field as the final page of the form. This is for use when you run out of room in a text field on that form. **Text fields may *appear* to expand while you are typing, but if you overfill a field, text that is past the field’s bottom margin will not print.**

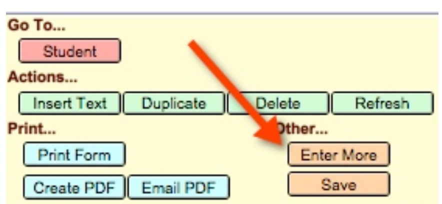


In the image to the left, the cursor is inside the text box, and you can see all of the text. However, the text box is overfilled. It overlaps the question directly below it.



When the cursor is no longer inside the text box, you can see how the page will appear when printed. Only the first three lines of the second paragraph will print.

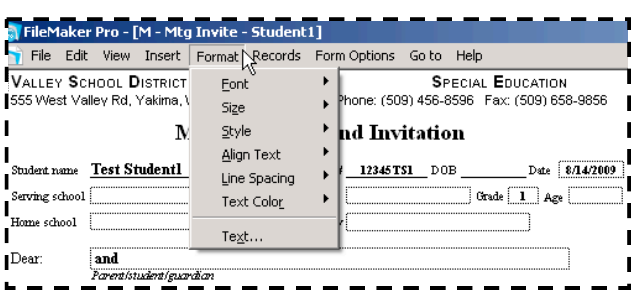
If you notice that you are close to the end of a field, or if you have gotten out of a text field and notice that not all of your text is visible, as shown above, you can use the “Additional Information” field for the overflow.



Simply click on the “Enter More” button in the Form Navigation Bar and you will be brought to the large “Additional Information” field at the bottom of the form. Here you may continue adding text; you may also cut and paste text from the field that has been overfilled.

This preserves the pagination of the form itself while allowing additional information to be added. Once text has been entered in this field, it will print out at the end of the other form pages. The student’s name is automatically added, so the additional page(s) are always identifiable.

Format Text on Forms

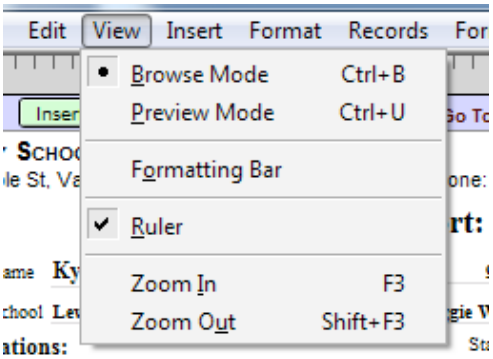


Once text is entered, you can format it in a variety of ways -- change font size, style, or color, alter the justification (left, right, center), use tabs to help line up columns of numbers, etc.

Users can use the Format menu or right-click on any text field to make these changes.

Display the Formatting Toolbar

If you're formatting a lot of text, it may be easier to use the toolbar.



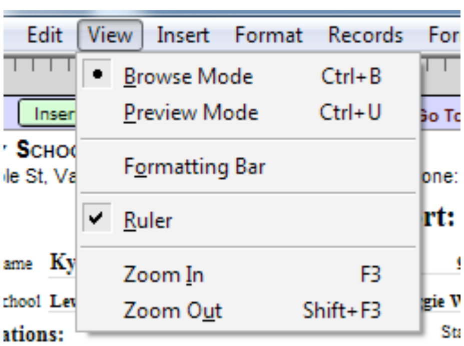
From within a form, select 'Formatting Bar' from the 'View' menu as shown on the left.

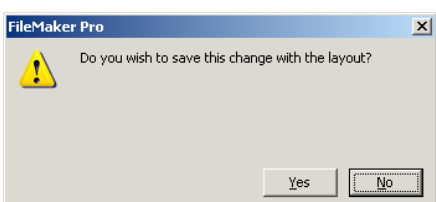
The toolbar will be displayed as shown below.

Use the Text Ruler

As noted in the "Entering Text on Forms" section, you can use tab characters to line up columns in the data entry areas in E-Com. However, the default tab stops in E-Com do not always work well for a given set of columns. The solution is to use the Text Ruler.

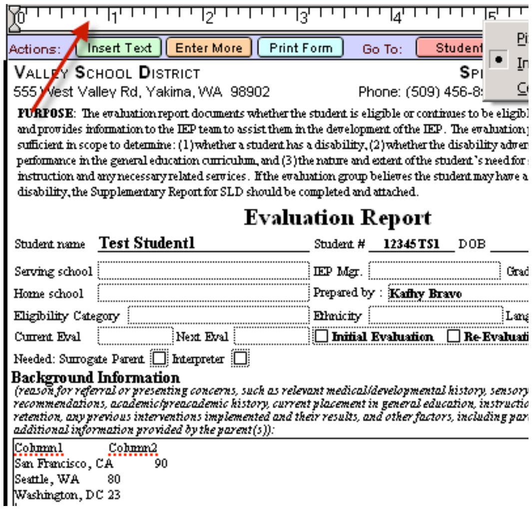
Note: Clicking the 'tab' key in E-Com takes you from field to field on the forms. To get a Tab character, type Control-Tab (Option -Tab on a Macintosh).





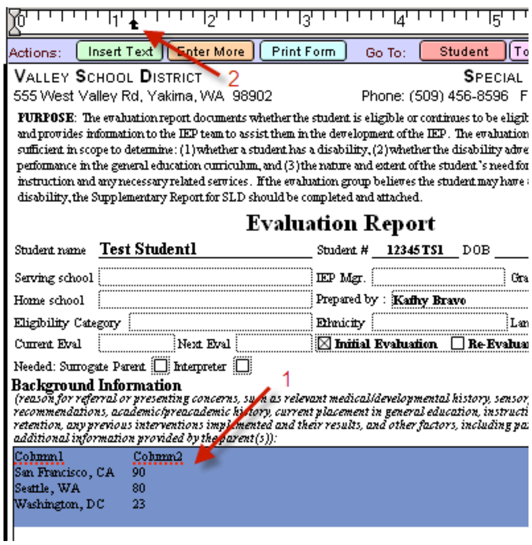
Once on a form, select 'Ruler' from the 'View' menu.

This will display the dialog seen on the left. If you want the ruler to be available each time you access the form, click 'Yes,' otherwise click 'No'.



The text ruler should now be displayed as shown.

Note: The text ruler can be set to display in pixels, inches or centimeters. To change this, right click on the ruler and select your desired measurement.

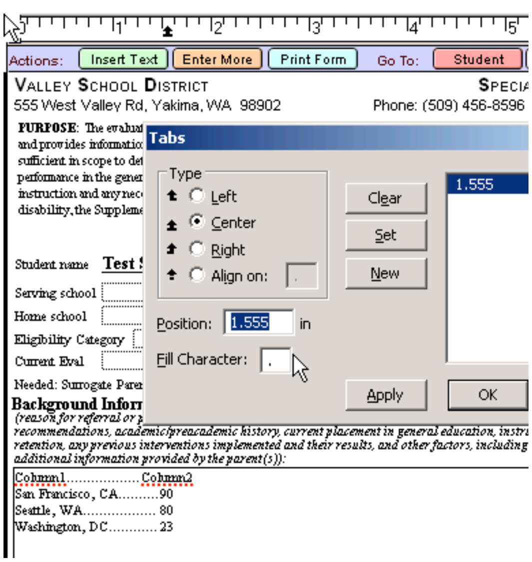


With your cursor in a text field, you will be able to edit tabs for the text ruler.

To do so:

1) Select the text for which you would like to modify the tabs.

2) Click on the text ruler where you want the tab stop to be. To fine-tune placement of the tab, drag the tab stop to the desired location.



Double clicking on the tab stop displays the 'Tabs' dialog (left). You may change other tab formatting here. Be sure to highlight the desired text before double clicking.

Tab type suggestions: Center for column headings, left for text in columns, and right for numbers with no decimal points. The 'Align On' option allows a column of numbers with decimals to line up on the decimal point.

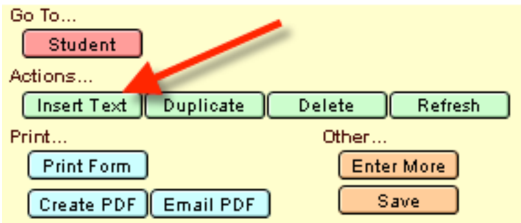
Fill Character option: You can fill the tab spacing with a character. For example, in the image left, the tab for column 2 has been changed to center justified and the tab space has been filled with periods.

Text Library

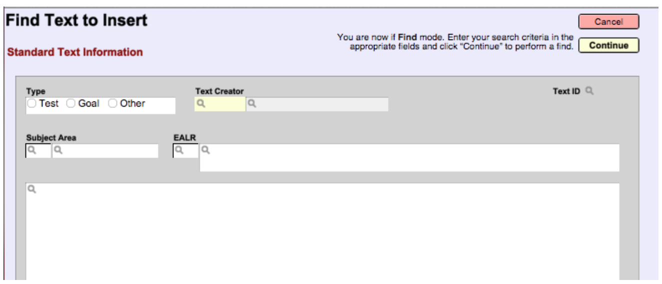
E-Com is built with a table of pre-defined blocks of text called ***Text Libraries***. They make it easier to enter frequently needed text blocks into any field on any form.

All forms have an '***Insert Text***' button in Form Navigation that can be used to copy any block of text from the library into your form. Other specialized libraries are also available via specific form buttons, including: 'Set Goal,' 'Insert Test,' and 'Standards.'

All ***Text Library*** entries can be edited by your E-Com system administrators and new library entries can easily be added.

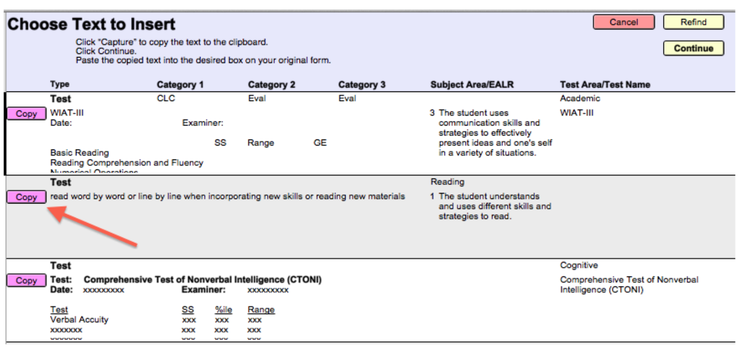


To insert an entry from the text library into your form, click the ***Insert Text*** button on Form Navigation.



This screen will be displayed, allowing you to enter your search criteria.

Click the ***Continue*** button when you are finished entering search criteria.



A list of matching text library entries will be displayed.

Click the ***Copy*** button next to the desired text entry. The text will be copied to the clipboard and you will be returned to your original form.

Put your cursor in the field where you want the text inserted and choose 'Paste' from the edit menu or use the keyboard shortcut Ctrl-V.

Your selected text will be pasted into the field.

Chapter 4: Special Forms

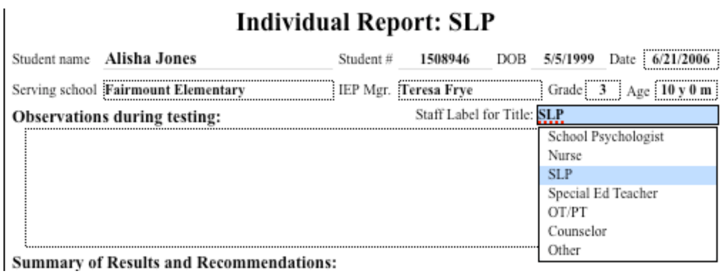
Users can take advantage of customized actions on certain forms. This section reviews some commonly used specialized form features.

Individual Report - Form #28.1

The special features on this form are ***Staff Label for Title***, ***Standards***, ***Guidance for IEP***, and ***Insert Test***.

Staff Label for Title

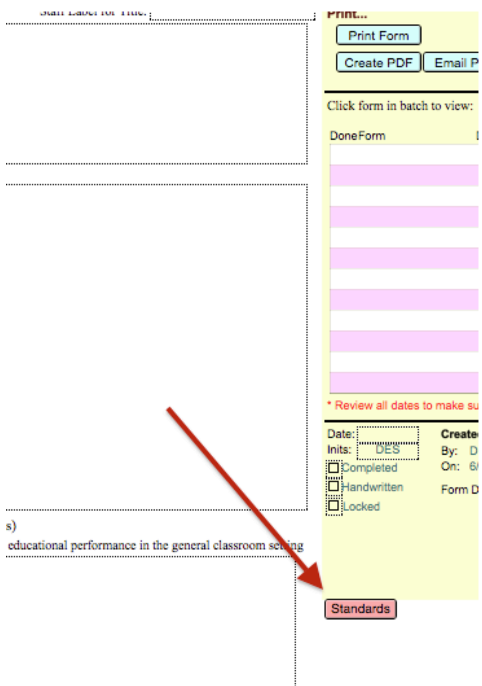
More than one staff member will likely complete an Individual Evaluation report for a student. Users can set this label to easily identify which type of staff member has completed the form. Selecting a label changes the descriptor field (on the ***Forms List*** view) in addition to modifying the title within the form to the selected staff title.



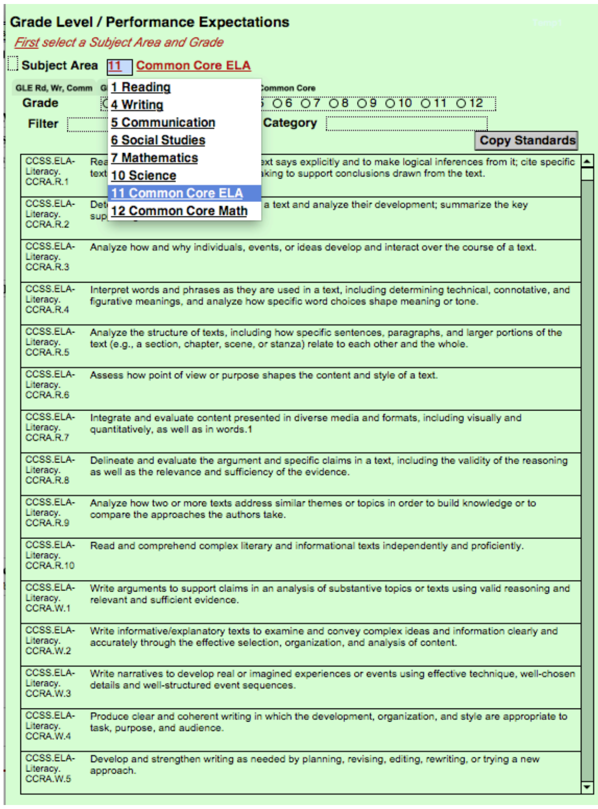
This field does not print, but allows the user to select the title for the form. In this case, SLP was chosen. Other options may include OT/PT, Nurse, etc.

'Standards' button

E-Com stores Common Core (ELA, Math) and EALR/GLE's as a specialized *Text Library*. This feature is also available for the Evaluation Report (4.5x) and the IEP Cover (11.x) forms.



To insert Common Core standards, EALRs (Essential Academic Learning Requirements) or GLEs (Grade Level Expectations) into your form, click the ***Standards*** button.



The Grade Level/Performance Expectations screen will be displayed.

1) Select the ***Subject Area*** from the drop down list.

2) Select the ***Grade***.

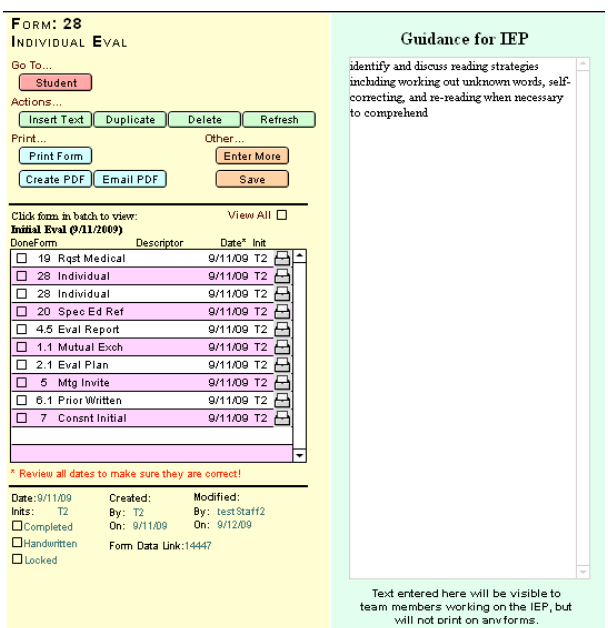
The standards will appear, depending on the two criteria selected.

Click on the text you wish to insert in any of the three areas, then select the "Copy Standards" button.

Once you have selected text and hit the Copy button, you will go back to the originating form, where you can paste the selected text where appropriate.

Guidance for IEP

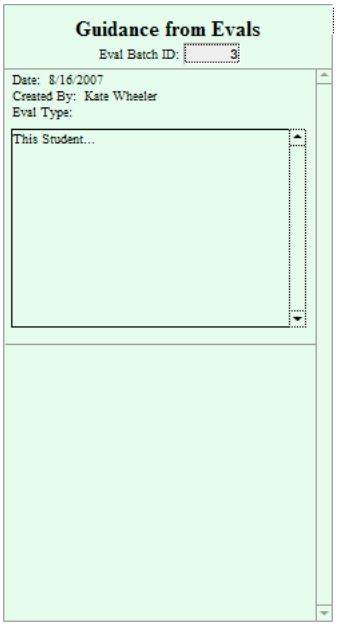
The Guidance for IEP feature allows the person completing the *Individual Evaluation* form 28.1 to create notes that are only visible to the users completing an *IEP Measurable Annual Goal* form.



Individual Eval Form

The right hand side of this form is where the text box for the Guidance for IEP is located. Simply type or copy & paste notes directly into the box.

These notes will **not** print when the form is printed. They are only visible to staff completing a goal form for this student.

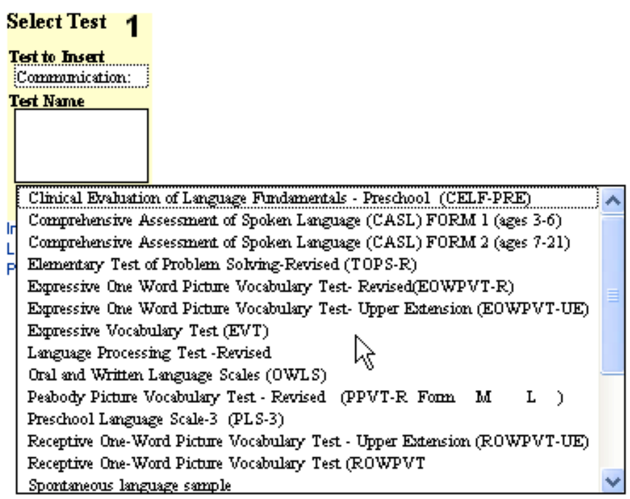


IEP Measurable Annual Goal Form

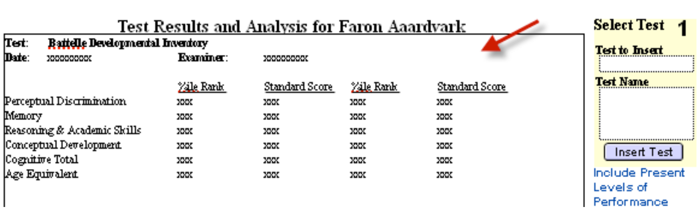
Notes entered into form 28.1 as above will appear on the right-hand side of the goal form, along with the date and person who created the notes. The **Eval Batch ID** (box under the "Guidance from Evals" title) is the link between the Eval forms and the Goals and Objectives forms. This should auto-complete, but if the notes are not appearing, simply type the batch number of the Eval Batch that contains the Individual Evaluation you wish to have appear into the Guidance from Eval box.

Insert Test button

On the right side of the Individual Eval 28.1 form, under the Forms Navigation bar, you will find a series of Insert Test buttons. From here you can insert pre-formatted test result grids from the ***Text Library***. Your admin staff may add new tests as they become available.



Select the testing area followed by the test name from the pop up lists provided then click the ***Insert Test*** button.



The pre-formatted text block will be inserted into the form.

The text can be edited as desired, including changing font sizes or other styling. See ***Formatting Text on Forms*** for more information.

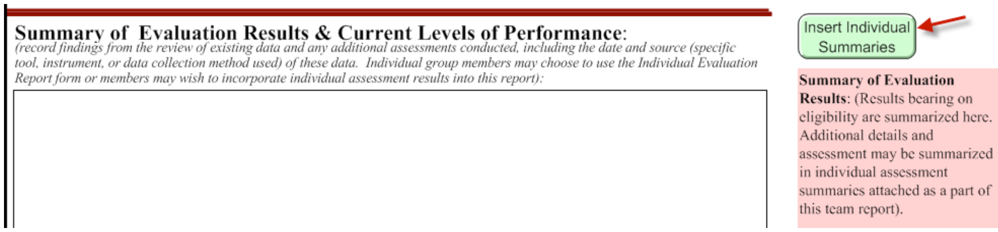
To line up the columns of numbers, the best option is to use tabs*.

* Clicking the tab key in E-Com takes you from field to field on the forms. To get a Tab character, type Control-Tab (Option –Tab on a Macintosh). See "Using the Text Ruler" to further fine tune tab alignment.

Evaluation Report - Form #4.5, 4.51

Insert Individual Summaries

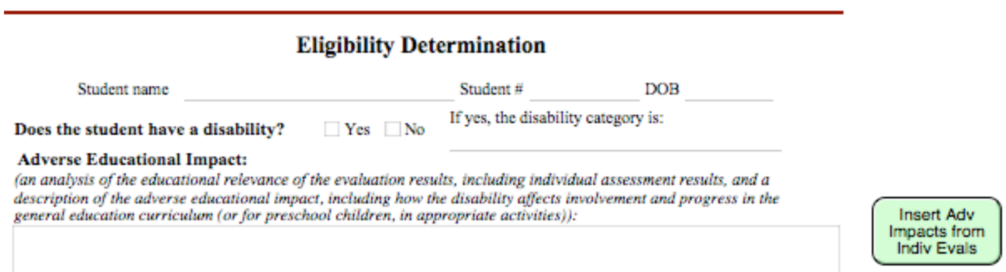
The ***Insert Individual Summaries*** button allows users to insert all individual summaries from associated 28.1 forms into the Team Summary form.



From the Evaluation Report form, click on the Insert ***Individual Summaries*** button. The individual summaries from associated 28.1 forms will appear, with the title of the person who created them at the top.

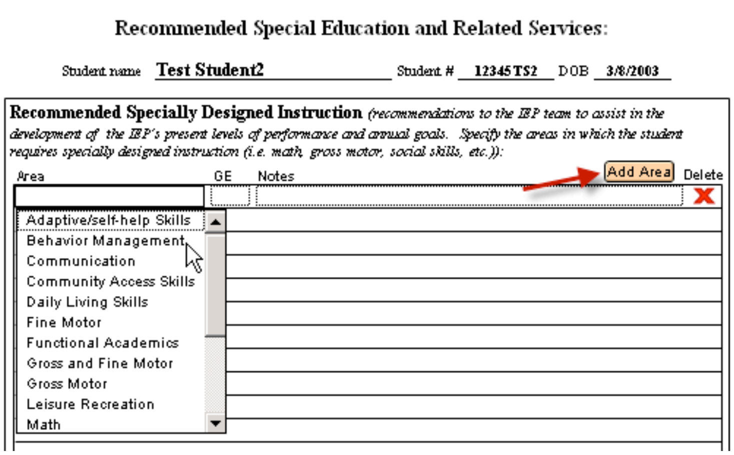
Insert Adverse Impacts from Individual Evaluations

This button allows users to insert all adverse impact summaries from the associated 28.1 forms into the Team Summary form.



To do so, from the Evaluation Report form, click on the ***Insert Adv Impacts from Indiv Evals*** button.

Area of Service Compliance



The Area of Service Compliance functionality on this form allows users to dynamically set the Areas of Services in multiple screens throughout E-Com.

On page 4 of the *Evaluation Report* you will find the *Recommended Special Education and Related Services* section. Click Add Area to add each Area of Service defined.

Areas of Service added here will automatically be populated to the

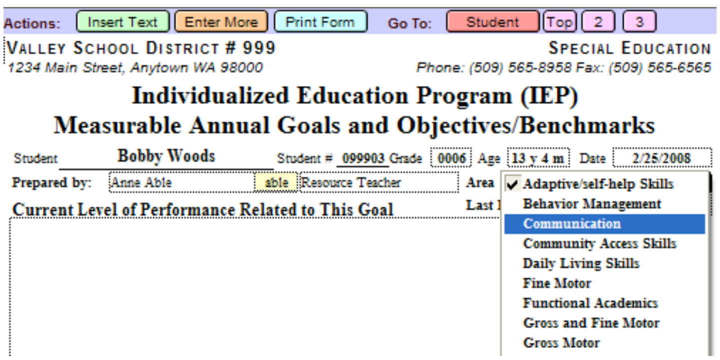
[Placement tab](#) and the ***[Student Information section](#)*** of the Student Screen if the form 4.5 they are added to is the ***most recent*** 4.5 form in the student's record.

If other Areas of Service have been added manually using the Placement tab on the Student screen, they will be saved and removed automatically when a batch containing form 4.5 is added to the student. If this form or batch is removed, these Areas of Service will return.

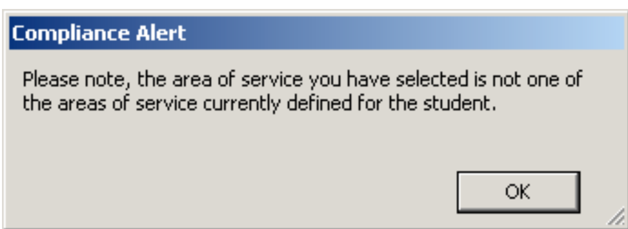
Additional Notes: If a 4.5 form is duplicated, the new form will not contain Areas of Service. These must be assigned manually. Also, if a disabling condition changes, refreshing the form will place the new condition on the first page. The condition field on page 3 must be manually updated after a refresh, however.

IEP Measurable Annual Goal - Form #12.4; 12.7

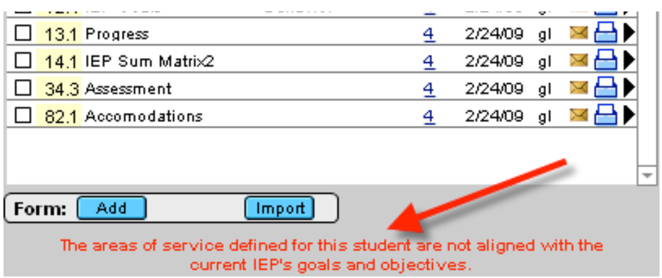
Area of Service Compliance



The ***Area*** drop down box allows users to choose one of the appropriate areas of service assigned to the student (there will be one goal form for each Area of Service defined).



If you select an area that was not identified during the evaluation process, the error shown at right will be displayed.

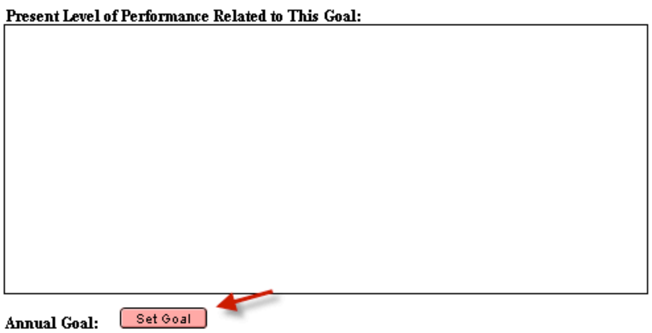


An alert will also appear on the ***Forms tab*** (under the Forms Listing section) if the Areas of Service on the IEP goal forms or the ***Placement tab*** do not match the areas of service called for by the evaluation.

Set Goal Button

To make it easier to write goals, E-Com can store goal text as a specialized ***[Text Library](#)*** entry.

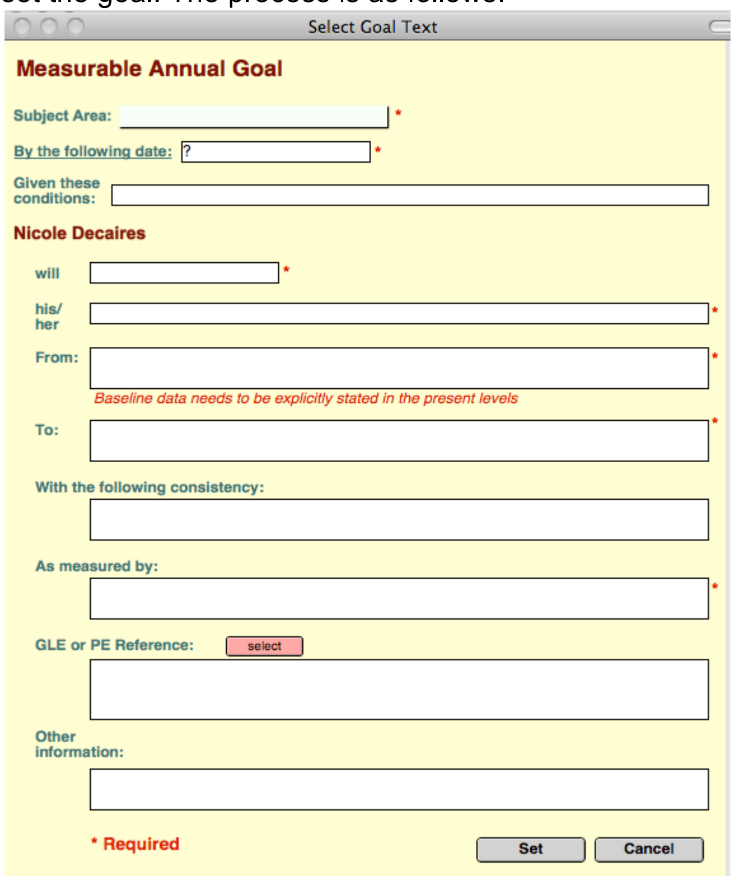
To insert specific goal text from the ***Text Library***, click the ***Set Goal*** button on the goals and objectives form.



If your E-Com administrator has determined that your district will use the “strict” method of entering goals, all text in the Annual Goal field must be entered AND edited in the manner described.

In other districts, you will be able to enter goals using this method, or by freely typing them into the form without using the “Set Goal” functionality. You will also be able to duplicate forms and modify any goal text already entered there without opening the “Select Goal Text” dialog.

When staff select the “Set Goal” button on any goal form, they will get a pop-up window. Fields with a red asterisk are required fields and text must be entered in order for the user to set the goal. The process is as follows.



- Select the Subject Area from the drop-down list. (This is a list of all Areas of Service in your district.)
- Enter a date into the “By the following date:” field if it does not auto-fill.
- “Given these conditions” is optional.
- Select either “increase” or “decrease” from the next field’s pop-up list, or enter another modifier.
- Select a skill set from the drop-down list in the next field. If none of the list items pertain, other text may be entered.
- Enter appropriate text into the “From:” and the “To:” fields that follow.
- The next field, “With the following consistency,” is optional.
- The “As measured by” field has another drop-down list, or users may type in their own.
- If users wish to enter a GLE or PE reference, they may do so by either typing it into that field, or by clicking the “select” button, and selecting it from the appropriate area in the pop-up dialog that appears.
- Other information may also be added.
- Once the required fields are entered, clicking the “Set” button will cause the entire entry to be pasted into the “Annual Goal” field on the goal form.

In districts with the “Strict Goal Text” option, any editing of a goal already entered in a form must happen via the “Set Goal” button. In this case, simply click the “Set Goal” button again, and when the dialog box opens, the goal text will appear in the fields of the dialog box. It may be edited there.

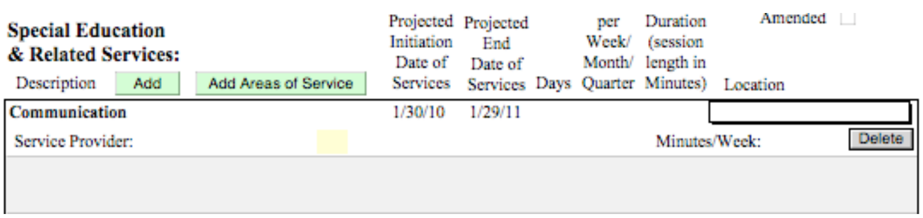
Goals set on either form 12.4 or 12.7 will appear automatically on forms 13.1, 13.2, or 13.3 if the IEP dates and Student ID numbers on both forms match.

Summary of Services Matrix - Form #14.1x

There are several different summary of service matrix forms. Form 14.3 is the state model form and has no special characteristics. Form 14.1 is described below. Form 14.11 is a multi-year version of the form, for use when the IEP breaks over the school year, or over a shift in schools (from elementary to high or junior high, for instance); it is described in the section after this. Form 14.12 is identical to form 14.1 except that it includes a “Related Service” checkbox field next to the “Minutes/Week” area that may be used to designate a related service.

Add Areas of Service Button

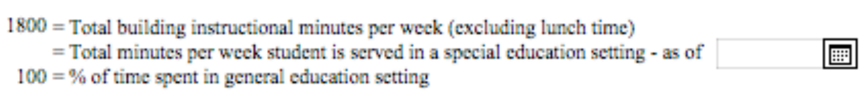
When this button is clicked, any areas of services already assigned to the student will appear, along with the begin and end dates. Service provider, details of the service schedule, and the location need to be completed by the person filling out the form. (***Please note: Service provider* names *do* NOT *print when the form is printed or when a PDF of the form is created; only the title prints.***)



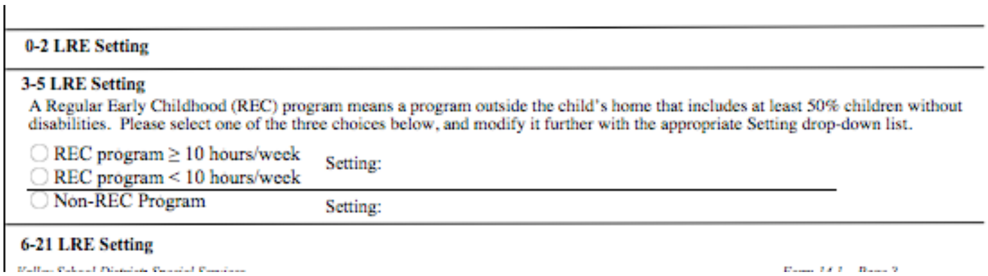
Minutes per week (under the Location field) will auto-calculate.

To calculate percentage of time spent in a general education setting, fill in the “Total building instruction minutes per week (excluding lunch time)” field at the bottom of the first page, if it is not already entered.

The two fields under the “Total building minutes” field will auto-calculate once you enter a date in the “as of” field at the end of the second line. You may click on the calendar icon and choose a date that way, or click in the space in front of the icon, and manually enter the date.



If you select the LRE setting, found at the bottom of page 2 (see below), service minutes listed on the ***most recent*** Summary of Services Matrix form will auto-calculate the LRE code and display it on the Student screen, Special tab. The calculation on the Student Special tab will be as of the current day’s date, not as of whatever date is selected or displayed on the form.



0-2 LRE Setting

3-5 LRE Setting

A Regular Early Childhood (REC) program means a program outside the child's home that includes at least 50% children without disabilities. Please select one of the three choices below, and modify it further with the appropriate Setting drop-down list.

○ REC program ≥ 10 hours/week
○ REC program < 10 hours/week
Setting:

○ Non-REC Program
Setting:

6-21 LRE Setting

In addition, if services are assigned to staff members on the 14.1 form, those minutes will appear on that staff's Service Roster report, available either from the Reports list (all staff), or from the Reports menu item "My Service Roster" available on the Staff screen (for the individual staff member).

Summary of Services Matrix (Multi-Year) - Form #14.11

Form 14.11 is available for use when services break over a school year, particularly for transitional students. There is an additional service matrix page; the first page is for one school year, with end dates that may be modified, and the second is for the next school year, with initiation dates that may be modified. LRE codes and service roster reports will pull the correct data from either the first or the second summary matrix as date's progress. There is a field where you may enter the grade level for each section.

Other Documents - Form #90

If you want to add external documents (PDFs or Word documents from another source, for instance) to a batch, you may do so using a "90" form. Have the document you wish to attach available on your desktop or shared drive. Make sure the document you will be adding does not have any "special characters" in the file name – this includes commas, hyphens, parentheses, and others (!, @, #, $, %, ^, &, *, (,), etc.).

Add a form 90 to the batch where you want the external document. Once added, open it, select the green "Insert Document" button, and then browse to the document you wish to insert. It will be added to the form. Notes about the document may be entered manually in the Document Notes field. The descriptor field of the form 90 will display the name of the attached document.

This document will be available to others who have access to the student's record. In order to see and print the document, staff must select the "View Document" button. This will need to be done manually in order to print the document with the batch.

The "Delete Document" button will remove the attached document from the form field. This action cannot be undone. If you need to replace the document, you will need to reinsert it. (If the entire form is deleted, it may be undeleted, as is usual with forms.)

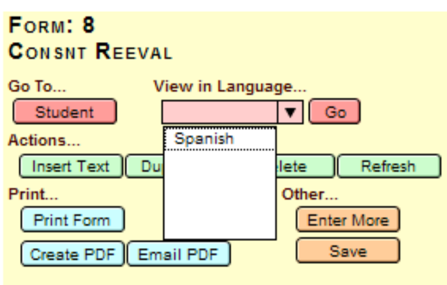
It is important to note that if users print or email a batch, only the E-Com forms will be included. Any external documents attached to the batch via a Form 90 will need to be printed or emailed separately. This holds true when creating a PDF of the batch as well.

Spanish Language Forms

Currently, the following forms are available in Spanish as well as English. We are working to get an entire IEP batch translated into Spanish.

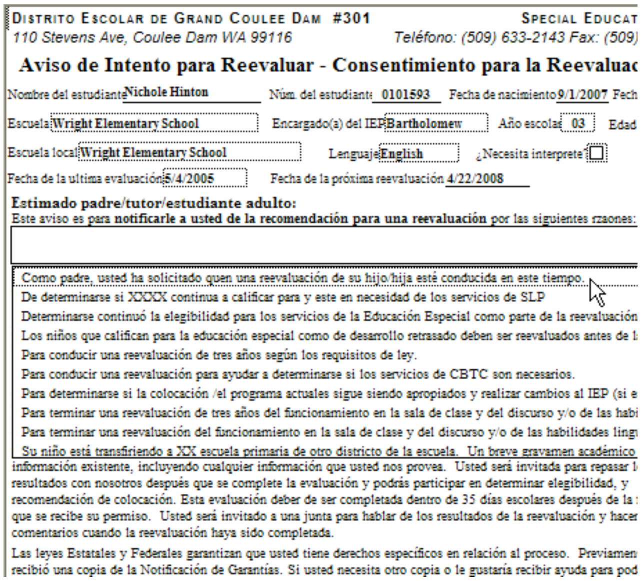
- Prior Written Notice (6.1, 6.2)
- Notice of Decision to Evaluate (7.1)
- Notice of Intent to Re-evaluate (8)
- IEP Cover (11.2, 11.22, 11.41)
- Measurable Annual Goal (12.4, 12.5)
- Measurable Annual Goal & Objectives (12.6, 12.7)
- Progress Report (13.2, 13.3, 13.4)
- Summary of Services Matrix (14.1)
- ESY Addendum (33.5)
- Assessment of Student Achievement (34.2, 34.32)
- IEP for Transition (36.2)
- Re-evaluation Waiver (56.1)
- Request to Excuse a Team Member (61.1)
- Invitation to Attend a Meeting (74, 74.1)
- Parent Consent (75)
- Consent for School-Based Medicaid Reimbursement (79.1, 79.2, 79.3)
- 504 Parent Rights (81.01)
- Accommodations and Modifications (82, 82.12)
- Parent Input (83)
- Parent Consent for Use of Private Insurance (86)

Note: Text entered into text fields is not translated when you switch from one version to the other. Neither do selections made from drop-down lists.



To access the Spanish language version of a form, simply select ***Spanish*** from the "View in Language" drop-down list in ***Form Navigation***. (If a form does not have this drop-down, a Spanish language version is not currently available.)

Then click ***Go.***



DISTRITO ESCOLAR DE GRAND COULEE DAM #301 SPECIAL EDUCAT
110 Stevens Ave, Coulee Dam WA 99116 Teléfono: (509) 633-2143 Fax: (509)

Aviso de Intento para Reevaluar - Consentimiento para la Reevaluac

Nombre del estudiante Nichole Hinton Núm. del estudiante 0101593 Fecha de nacimiento 9/1/2007 Fech

Escuela Wright Elementary School Encargado(a) del IEP Bartholomew Año escolar 03 Edad

Escuela local Wright Elementary School Lenguaje English ¿Necesita interprete?

Fecha de la ultima evaluación 5/4/2005 Fecha de la próxima reevaluación 4/22/2008

Estimado padre/tutor/estudiante adulto:
Este aviso es para **notificarle a usted de la recomendación para una reevaluación** por las siguientes rzaones:

Como padre, usted ha solicitado quen una reevaluación de su hijo/hija esté conducida en este tiempo.
De determinarse si XXXX continua a calificar para y este en necesidad de los servicios de SLP
Determinarse continuó la elegibilidad para los servicios de la Educación Especial como parte de la reevaluación
Los niños que califican para la educación especial como de desarrollo retrasado deben ser reevaluados antes de l
Para conducir una reevaluación de tres años según los requisitos de ley.
Para conducir una reevaluación para ayudar a determinarse si los servicios de CBTC son necesarios.
Para determinarse si la colocación /el programa actuales sigue siendo apropiados y realizar cambios al IEP (si e
Para terminar una reevaluación de tres años del funcionamiento en la sala de clase y del discurso y/o de las habi
Para terminar una reevaluación del funcionamiento en la sala de clase y del discurso y/o de las habilidades ling
Su niño está transfiriendo a XX escuela primaria de otro districto de la escuela. Un breve gravamen académico
información existente, incluyendo cualquier información que usted nos provea. Usted será invitada para repasar l
resultados con nosotros después que se complete la evaluación y podrás participar en determinar elegibilidad, y
recomendación de colocación. Esta evaluación deber de ser completada dentro de 35 días escolares después de la
que se recibe su permiso. Usted será invitado a una junta para hablar de los resultados de la reevaluación y hacer
comentarios cuando la reevaluación haya sido completada.

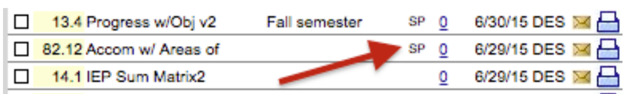
Las leyes Estatales y Federales garantizan que usted tiene derechos específicos en relación al proceso. Previamen
recibió una copia de la Notificación de Garantías. Si usted necesita otro copia o le gustaría recibir ayuda para pod

This will bring you to a form with the same text, but in Spanish. Drop-down lists, if any, may also be available in Spanish.

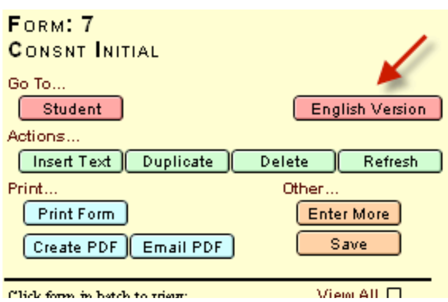
If the school or district name has a Spanish version entered in the School data entry screen, that name will appear in the header area (see image left).

You may toggle back and forth between the English version and the Spanish version of the form.

Note: Dates must be entered on the forms in the English version. When switching to the Spanish version, the dates will change from the English mm/dd/year format to the Spanish dd/mm/year format.



Note: There will be a small "SP" designation next to the "Descriptor" field in the batch view for forms that will display in Spanish when they are opened.



To return to the English Language Version, simply click the ***English Version*** button in ***Form Navigation***.

If you prefer to have both an English and a Spanish version of the form, you may add two copies of the form to the batch, fill in the English version, and then use it to fill in the Spanish using the **side-by-side functionality**. This allows you to have the English version needed for the state as well as a separate version for the parents or guardians.