SEIS

Provider Level Training

**SEIS Network
July 2021**

Alameda County
Mid-Alameda County
Mission Valley
North Region
Oakland Unified
Tri-Valley

Alpine County
Tahoe/Alpine*

Amador County
Amador County

Butte County
Butte County

Calaveras County
Calaveras County

California State Agency
California Department of
Corrections and
Rehabilitation**

Colusa County
Colusa County

Contra Costa County
Contra Costa County
Mt. Diablo Unified
San Ramon Valley
West Contra Costa Unified

Del Norte County
Humboldt/Del Norte

El Dorado County
El Dorado Charter
El Dorado County
Tahoe/Alpine*

Fresno County
Clovis Unified
Fresno County
Fresno County Charter
Fresno Unified

Glenn County
Glenn County

Humboldt County
Humboldt/Del Norte

Imperial County
Imperial County

Inyo County
Inyo County SELPA

Kern County
Sierra Sands SELPA

Kings County
Kings County SELPA

Lake County
Lake Co. County SELPA

Lassen County
Lassen County SELPA

Los Angeles County
ABC/Norwalk-LaMirada SELPA
Antelope Valley SELPA
Compton SELPA
Downy USD
East San Gabriel Valley SELPA
Foothill SELPA
LACOE Charter SELPA
Mid Cities
Pasadena USD SELPA
Pomona USD SELPA
Santa Clarita Valley SELPA
Southwest Service SELPA
Tri-Cities SELPA
West San Gabriel Valley SELPA
Whittier Area Co-Op SELPA

Madera County
Mariposa County
Madera/Mariposa SELPA

Marin County
Marin County SELPA

Mendocino County
Mendocino SELPA

Merced County
Merced County SELPA

Modoc County
Modoc County SELPA

Mono County
Mono County SELPA

Napa County
Napa County SELPA

Nevada County
Nevada County SELPA

Orange County
Anaheim City
Garden Grove Unified
Greater Anaheim
Irvine Unified
North-East Orange County
North Orange County
Orange Unified
Santa Ana Unified
South Orange County
Tustin Unified
West Orange County

Plumas County
Plumas County

Riverside County
Corona-Norco
Riverside County
Temecula
Moreno Valley

Sacramento County
Elk Grove Unified
Folsom Cordova Unified
Sacramento City Unified
Sacramento County
San Juan Unified

San Bernardino County
Fontana Unified
West End
Ontario-Montclair
San Bernardino City
Morongo Valley

San Diego County
East County
North Inland
South County
North Coastal
Poway Unified
HOPE Infants

San Francisco County
San Francisco Unified

San Joaquin County
Lodi Area
San Joaquin County
Stockton Unified

San Luis Obispo County
San Luis Obispo County

San Mateo County
San Mateo County

Santa Clara County
Southeast Consortium

Santa Cruz County
North Santa Cruz County

Shasta County
Shasta County

Sierra County
Sierra County

Siskiyou County
Siskiyou County

Solano County
Solano County
Vallejo City Unified

Sonoma County
Sonoma County
Sonoma County Charter

Stanislaus County
Stanislaus County
Modesto City Unified

Sutter County
Sutter County

Tehama County
Tehama County

Trinity County
Trinity County

Tulare County
Tulare County

Tuolumne County
Tuolumne County

Yolo County
Yolo County

Yuba County
Yuba County

Entire Counties
Partial Counties

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http://beta.seis.org

CODE STACK

SEIS was created in 2003 and serves over 100 SELPAs and over 1,500 districts/LEAs in California.

CODE STACK is a department within SJCOE, which provides web-based software and mobile development services and solutions.

CODE STACK hold an Annual CSC User Conference for Special Education, Human Resources and STEM.

3

Web-based Data Entry System

When working with any web-based data entry system, it is important that users utilize the features within the system to navigate.

If the back button is used or multiple SEIS tabs are open, that will cause caching through the internet browser and will lead to data loss.

If multiple SEIS tabs are open, if one tab goes inactive for 1hr and 15mins, the user account will automatically be logged out.

Do NOT use the back button

Do NOT browse SEIS in multiple tabs
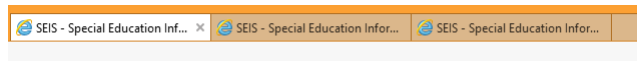
Do NOT log in as the SAME user in different browser
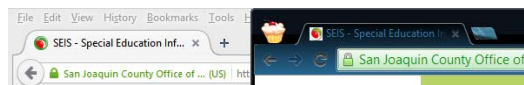
4

Internet Security Tips

SEIS is password protected.

If you download any files from SEIS, be sure to store them in a password protected folder or delete the files as soon as possible.

Be cautious when storing data on USB drives, as those are easily lost or misplaced.

Work with your IT department to create a policy on emailing or storing student data.

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5

The SEIS Mission

1. **To tell the story of the student through the IEP process.**
2. **Have accurate and up-to-date IEP data for quality data management.**
3. **Collect and submit data to CALPADS.**

By following the SEIS recommended best practices you will have:
- An accurate "electronic paper trail" for every student's meeting held in SEIS.

- The Future IEP and Student Record will have accurate data that can be used for district, SELPA and state reporting.

- Transactional data created based on the outcome of the meeting, for CALPADS reporting.

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6

CALPADS Reporting

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7

CALPADS Reporting

Special Education data is reported to CALPADS.

Data is captured transactionally so that CALPADS can see the "story" of the student.

The IEP data submitted is validated against the information submitted from the district's Student Information System (SIS).

Fall: Census Date (first Wednesday in October):
- This will include all transactions between 7/1 – Census Day
- Student and Services Files

End of Year (June 30):
- This will include all transactions between 7/1 – 6/30
- Student, Services and Post Secondary files

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8

4

What is a Transaction and how is it created?

A transaction is created when:
- When an IEP is affirmed (Initial, Plan Review (Annual) or Eligibility Evaluation (Triennial)
- When a student is Exited (exit reasons: 70, 73, 78, 84)
- When a student's status is changed to DNQ/Not Providing Services (Plan Type 700/800/900)
- When a students is Pending an Initial Evaluation (Meeting Type 30 / Plan Type 300)
- When an Amendment is affirmed and IEP Plan fields are updated

It is imperative that Case Managers review and validate that the IEP information is correct before affirming.

The IEP should be affirmed as soon as the meeting is completed.

Submit student change requests as soon as Eligibility is determined, or a student is exiting.

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9

IEP Plan Fields

If any of the following IEP Plan fields are updated via an Amendment, an Amendment transaction will be created.

- Primary Residence Code
- Special Education Program Setting Code
- Preschool Program Setting Service Location Code
- Preschool Program Ten Weekly Hours or Greater Indicator
- General Education Participation Percentage Range Code
- IEP Includes Postsecondary Goals Indicator
- Disability 1
- Disability 2
- Services
- District of Special Education Accountability

- Postsecondary Goals updated Annually Indicator
- Postsecondary Goals Age-Appropriate Transition Assessment Indicator
- Transition Services in IEP Indicator
- Supportive Services Indicator
- Student IEP Participation Indicator
- Transition Services Goals in IEP Indicator
- Agency Representative IEP Participation Code
- Special Transportation Indicator

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10
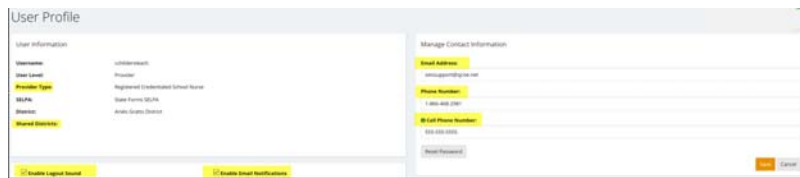
Manage Profile

To view or update your profile, click on your name at the top right of the page.

Verify that your Email address, Phone number and Cell Phone number are correct as this is used for the Message Center and E-Signature feature.

Verify that your User Type and District or School Access is correct, to ensure that you have access to the students, schools or districts needed.

- **Enable Logout Sound:** At 1 hour of inactivity, an alert will display letting you know that your account will be logged out of there is no activity within the next 15 minutes.
- **Enable Email Notification:** When an email is sent to you through the Messaging system in SEIS or for the Forgot Password feature, a notification email will be sent to the email address in your SEIS profile.

11

Provider Level Users

Provider level users only have access to the students they are assigned to.

Provider level users are assigned a home district but can be shared with any district in the SELPA.

Manage their part of the IEP and update Progress on their Goals in a timely manner so the Case Manager can Affirm within the recommended timeline.

Case Managers
- Communicate with the IEP Team so they are aware of timelines for the IEP.
- Are responsible for Affirm/Attest IEPs, Amendments and Progress Reports.

Submit an Add Student Form or Student Change form for the following:
- To have a student added or removed from your Caseload
- Change a student's Eligibility status
- To have a student Exited
- To notify the district of address change
- To create IEP transactions

12

Caseloads

There are multiple ways to view the students on your caseload.
- Student IEPs
- Caseload
- Eligible Students
- Pending Students
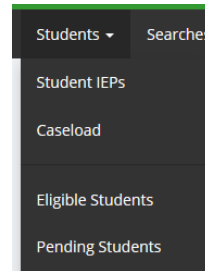
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13

Need to Add a Student?

To request that a student be added to your caseload, from the Students section of the upper navigation bar, click on the Add Student Form link.

If the student transferred from a non-SEIS district or from out of state, the student transferred field must be selected. This will serve as a reminder to enter the student's active IEP into SEIS, before the next meeting is held.

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14

Where does the Add Request Go?

In the Requests Submitted to District/SELPA section of the homepage, click on Add Requests to review your requests and see the status.

The add request is sent to the District and SELPA. Both user levels can process the add request.

The student's SEIS record may reside in another district, so the admin staff may have to request a transfer.

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15

Pending Initial Eval

Once Parent Consent is received:

- The Meeting Type must be updated to 30 Pending Initial Eval

- The students Plan Type must be updated to 300 Pending Initial Eval

- SSID must be requested

- This will create the Pending/300 reportable transaction

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16

How do I Change a Student's Eligibility Status?

After the Initial Evaluation is held, the student's status should be changed immediately.

To request that a student's Eligibility Status be updated, from the Students section of the upper navigation bar, click on the Student Change Form link.

Select Reason – Change Eligibility Status of Pending student

Fill out form below

Select Request

Change Eligibility status of Pending student

Determined Eligible, will receive services
Eligible – No IEP, IFSP, or ISP – Parentally placed in private school
Eligible – No IEP, IFSP, or ISP – Other Reasons
Determined Ineligible, DNQ
Assessment not completed

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Initial Evals - Scenarios

What if the parent provided consent but has now revoked consent. What do we do?

- The Parent Consent Date should be removed from the Student Record.
- Submit a Student Change form alerting the district of the parent revoke.

The student moved in the middle of the assessment. What do we do?
- The student should remain in a pending status (meeting type 30/plan type 300).
- The student's record can be transferred to the new district.

The assessment was held and the student qualifies, what do I do?
- The student's Plan Type would be updated (100/200/150) and eligibility would be updated to Eligible.

The assessment was held and the student did not qualify/will not be on an IEP, what do I do?
- The students Plan type would be updated to 700, 800 or 900 and Eligibility would be changed to DNQ/Not providing Services.
- **IMPORTANT**: Do not request to make the student Eligible in order to affirm. The Initial Eval would NOT be affirmed. When the status is changed to DNQ, a copy of the Initial will be saved to the IEP History page of the Student Record and would remain on the Future IEP.

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Where do Eligibility Requests Go?

From the Requests Submitted to District/SELPA notices, click on Eligible or DNQ to review your requests and see the status.

Requests Submitted to District/SELPA

5	3	5
Add Requests	Exit Requests	Record Changes
6	1	0
Eligibility Changes	Address Changes	IEP/CALPADS Requests

What if a Student is Exiting or has Transferred?

If a student has Exited or has transferred to another district, submit a Student Change form.

When an Exit or Transfer request is selected, it is required to go through the CALPADS error check.

All errors must be corrected before the student can be exited or transferred.

Fill out form below

Select Request	Student has moved to another district and/or SELPA
Exit Date	
Exit Reason	—Select One—
Comments	

Submit Request   Cancel

Fill out form below

Select Request	Exit the student from Special Education
Exit Date	
Exit Reason	—Select One—
Comments	

Submit Request   Cancel

Exits

If a student is eligible and receiving services and the parent revokes consent for services, is that an Exit or a DNQ?
- If the student is Eligible and the parent revokes consent and withdraws their child from Special Education, this is an Exit.
- A student change form would be submitted, requested to Exit the student with an Exit Code 78 – Parent Withdraw.
- **Do not** change the student's Plan Type to 800 and request to DNQ the record.

If a student is eligible and receiving services and the parent declines the IEP and ISP to place their child in a private school, is this an Exit or DNQ?
- If the student is Eligible and the parent declines the IEP and ISP to place their child in a private school, this is an Exit.
- A student change form would be submitted, requested to Exit the student with an Exit Code 78 – Parent Withdraw.
- **Do not** change the students Plan Type to 700 and request to DNQ the record.

What do I do if a student is a no show?
- If the student is a no show, the attempts made to contact the parent/student must be documented.
- If it has been determined that the student is not returning to school/district, submit a Student Change form selecting the appropriate reason of Exit or Transferred, depending on the outcome of the investigation.

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21

Where do Exit/Transfer Requests Go?

From the Requests Submitted to District/SELPA notices, click on Exit Requests to review your request and see the status.

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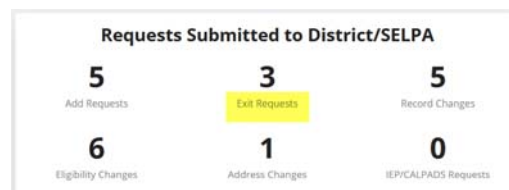
22

Need a Student Removed?

To request that a student be removed to your caseload, from the Students section of the upper navigation bar, click on the Student Change Form link.

Select the Students name, then select "Student should not be on my caseload."

23

Where does the Removed Request Go?

From the Requests Submitted to District/SELPA notices, click on Record Changes to review your request and see the status.

24

Where do I document if a Student's Address Changes?

If a student's home address changes, it is important that a Student Change form is submitted.

Most districts utilize the SEIS nightly integration feature, which updates the students address.

If the address is updated in SEIS but not the SIS, then it can be overwritten that night.

Also, any mailings from the district should go to the new address.

Fill out form below

Select Request   Change of Address

Comments

Submit Request   Cancel

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25

Where do Address Change Requests Go?

From the Requests Submitted to District/SELPA notices, click on Address Changes to review your requests and see the status.

Requests Submitted to District/SELPA

5	3	5
Add Requests	Exit Requests	Record Changes
6	1	0
Eligibility Changes	Address Changes	IEP/CALPADS Requests

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26

IEP / CALPADS Changes

With the Amendment validations in place, a provider will not be able to add an Amendment unless an IEP transaction exists.

This notice can also be used if an IEP was affirmed with the incorrect Meeting date/Meeting Type, parent revoked consent for Assessment or for any other IEP/CALPADS related questions.

Fill out form below

Select Request   Manage IEP/CALPADS data

Comments

I am unable to add an Amendment to the IEP dated 07/28/2020. An IEP transaction needs to be created for this student.

Submit Request   Cancel

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27

Where do IEP/CALPADS Changes Go?

From the Requests Submitted to District/SELPA notices, click on IEP/CALPADS Requests to review your requests and see the status.

Requests Submitted to District/SELPA

5 — Add Requests   3 — Exit Requests   5 — Record Changes

6 — Eligibility Changes   1 — Address Changes   0 — IEP/CALPADS Requests

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28

Students Added / Removed

Students Added/Removed

5 **4**
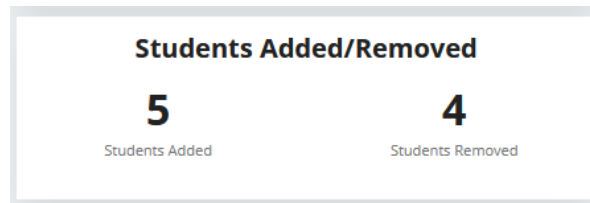
Students Added Students Removed

Students Added

The Students Added notice displays the students that have been added to your caseload.

Once reviewed, these notices can be removed.

The notices should stay at 0, so you can easily identify when a student has been added.

Check/ Uncheck All	StudentID	Last Name	First Name	Birthday	Case Manager	Eligibility	Added By	Added On
	1604539	Abbot	Annie	11/23/2005	Cristy Childers	Yes	CristyChilders	04/30/2021

Students Removed

The Students Removed notice displays the students that have been removed to your caseload.

Once reviewed, these notices can be removed.

The notices should stay at 0, so you can easily identify when a student has been removed.

Check/ Uncheck All	Last Name	First Name	Birthday	Removed By	Removed On
🗑 ✉ lovelylocks		lady	09/09/2012	MariaJunez	07/09/2019

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Students

The Students section displays the number of Eligible and Pending students.

It is important to keep an eye on Pending students, as only students that have not had their initial IEP should be listed as Pending.

Do any Pending students have an Initial Eval Date and Plan Type selected?

Students

61 Total

● 15 Eligible

● 46 Pending

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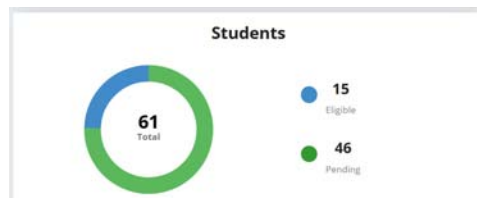
Contact
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Pending Students

Only students that are Pending Initial Evaluation (Plan Type 300) should be in a Pending status.

Students in a Pending status will not be reported to CALPADS (except for Plan Type 300 students).

IEPs are unable to be affirmed if the student is in a Pending status.

Follow Up

Unaffirmed IEPs
A student will pull into this notice if the IEP date on the Future IEP is after the IEP date on the Current IEP.

Unaffirmed Amendments
A student will pull into this notice once an Amendment has been added.

Unsigned IEPs
During the IEP affirm process, if the user selects No for Signed in Agreement, the student will pull into the notice.

Unsigned Amendments
During the Amendment affirm process, if the user selects No for signature, the student will pull into the notice.

Electronic Signatures
If an E-Signature package was created and sent, the notice will display the status of the E-Signature package.

Transactions occur when IEPs and Amendments are affirmed.
It is important that IEPs and Amendments are affirmed as soon as the meetings are completed.

Follow Up

- 5 Unaffirmed IEPs
- 2 Unaffirmed Amendments
- 1 Unsigned IEPs
- 18 Unsigned Amendments
- 0 Electronic Signatures

Follow Up

Users can manage the E-Signature process from the Follow Up section of the homepage.

The status will automatically update as signatures are obtained and once the package is ready for the next steps.

Click the Go to E-Signature icon to be directed to where the E-Signature was created.

Follow Up

To view the details of the E-Signature package,

click the **View E-Signature Details** icon.

From here you can:
- Add new signers
- Edit the Email and Phone number of existing recipients
- Resend the E-Signature package to individual signer's
- Remove signers from the E-Signature package

CALPADS Alerts

The CALPADS Alerts displays the following notices:

Program Setting / Preschool Program Setting
- If the student's Program Setting will change within the IEP year, it should be documented on the IEP, in the Program Setting Projection field.

- The purpose of the notice is for the Case Manager to create an Amendment to document the Program Setting change, to be submitted to CALPADS.

- The student will display on the notice 30 days before the projected Start Date and will be removed 14 days after the projected Start Date.

Private School
- This notice displays any student where their School of Attendance is Private and their Plan Type is not 200 (ISP).

CALPADS Alerts

- 0 Preschool Program Settings
- 1 Program Settings
- 40 Private School

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37

Meeting Alerts

Meeting Alerts

Next Annual Plan Review	5 Total	/	3 Past Due
Next Eligibility Evaluation	2 Total	/	2 Past Due
Initial Evaluations	0 Total	/	0 Past Due
Interim Placements / 30 Day Reviews	0 Total	/	0 Past Due

Infant Meeting Alerts

| Infant Initial Evaluations | 2 Total | / | 2 Past Due |
| 6 Month Review | 2 Total | / | 2 Past Due |

Part C to Part B Transition

| Students Turning Three | 1 Total | / | 0 Past Due |

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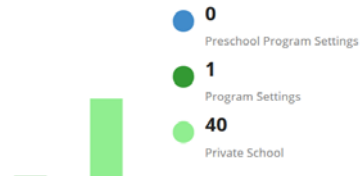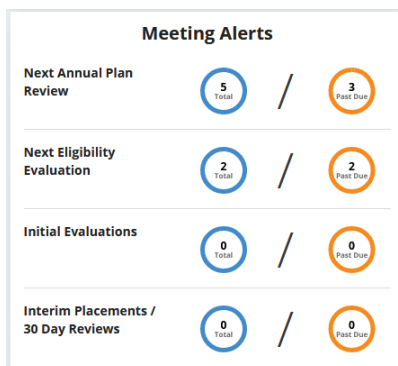
38

Meeting Alerts

The Alerts are generated from the data entered onto the Student Record or IEP forms.

- **Next Annual Plan Review & Next Eligibility Evaluation** pulls from the Next Annual Plan Review and Next Eligibility Evaluation date fields on the Info/Eligibility form

- **Initial Evaluations** is a 60-day projection from the Parent Consent Date

- **Initial Placement / 30 Day Reviews** is a 30-day projection based on the Date Student Enrolled in District field on the Dates page of the Student Record.

- **Student Turning 3** pulls in students that will turn 3 within 30 days

- **Infant Initial Evals** pulls from the Infant Parent Consent Date field

- **6 Month Review** pulls from the Next IFSP Date field on the Infant Data Sheet

Calendar
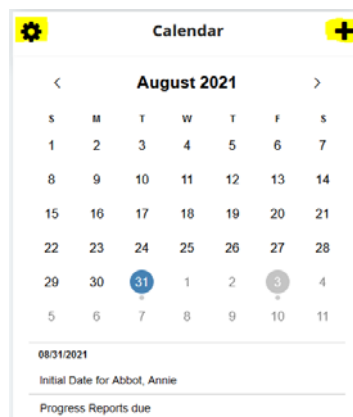
Calendar

To add an Event, **double click** on the date or click the **Add Event** icon.

Enter the Event Name, select the date and enter any comments, if needed.

To view or delete an Event, click in the event row.

41

Calendar

Easily print your calendar for the current month or multiple months!

Click the **Options** icon, enter a date range and click **Generate Report**.

42

Calendar

When a Meeting Notice is created, a calendar item will automatically be added.

The event will be added to the calendar of all providers for that student.
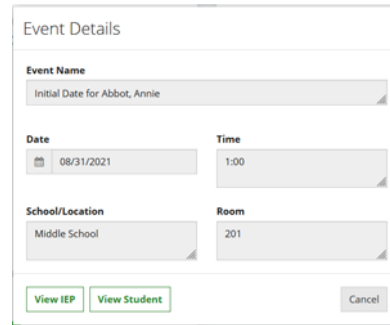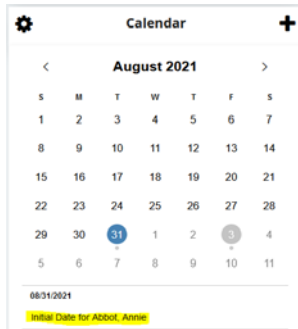
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43

The Student Record

SEIS

44

System Structure

Student Record

- Demographic data
- CALPADS Student and Services
- Parent Guardian Information
- School, District Information
- Important Dates
- Historical data
- Student Record Notes and Attachments
- All Custom fields

Shared Information
Student Record ➡ Future IEP

IEP

IEP Forms are selected by the SELPA
CALPADS fields are highlighted in Red

- Present Levels
- Goals
- Information/Eligibility
- Services
- Statewide Assessments
- Transition
- Etc.
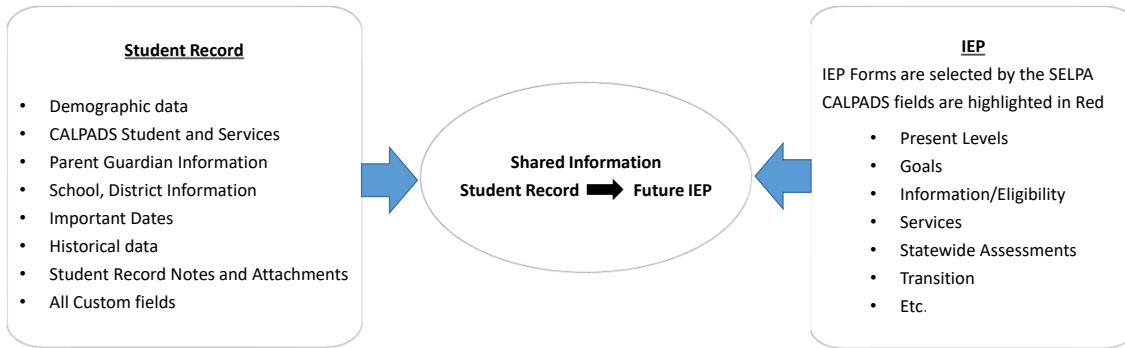
45

Student IEPs

The Student IEPs page is where you can access the Student Record, IEPs, Progress Reports and Amendments.

- **Student Record**, click the Student icon.
- **Future IEP**, click the Edit icon, in the IEPs column
- **Current IEP**, click the Current IEP icon, in the IEPs column
- **Historical IEPs**, click the View History icon, in the IEPs column
- **Progress Reports**, click the Write Progress icon in the P/R column
- **Print/view historical Progress Reports**, click the View Progress icon, in the P/R column

	SEIS ID	Name / Dist ID	DOB	Case Manager	District Of Service	School	IEPs	P/R	DRDP
⚠🔒👤 ●	530239	Lovegood, Luna	04/08/2004	Cristy Childers	Ariels Gratto District	Cristys Fun School	✏📑📂	✏📂	
⚠👤 ●	534646	Mockly, Jar	11/15/2008	Cristy Childers	Ariels Gratto District	Sea Star Secondary	✏	✏	

46

CALPADS Student

The CALPADS Student page stores all CALPADS fields.

When an IEP is affirmed, it must go through a CALPADS error check, which is done through this page.

To view CALPADS errors, click the **Error Check** button

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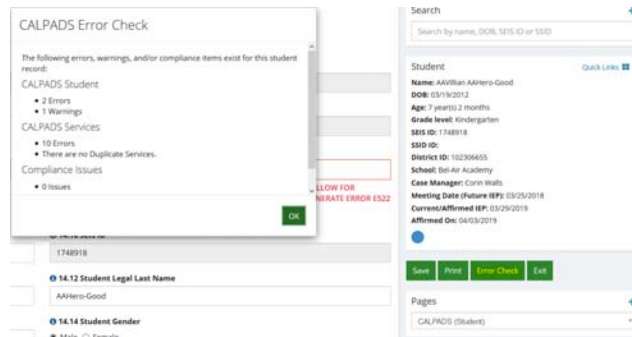
47

CALPADS Services

The CALPADS Services page displays all services for the student. The services link from the Services page on the Future IEP.

Do Not Report – Does not pull the service into the CALPADS report.

SEIS
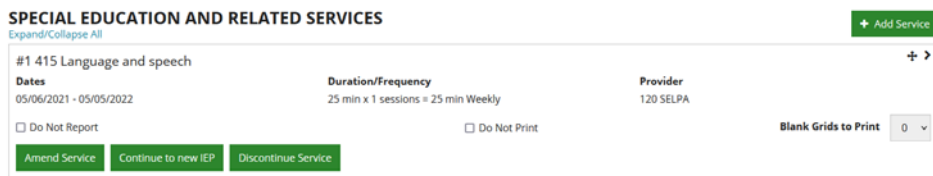
48

Notes and Attachments

The Notes and Attachments page is where you can enter Ed Alerts for a student, Upload attachments unrelated to the IEP and additional Notes.

Goal Banks

Personal Goal Bank

As a Provider level user, you can create a personal Goal Bank.

Goals from your personal goal bank can be transferred to a student's IEP.

Managing your personal goal bank:
- Add **Focus Areas** to organize your goals
- To add a Goal, click the **Add Goal** button
- Enter a goal manually or use the Template link to ensure all areas of the goal is addressed.

Goal Template

Goal Library

SEIS offers a Goal Library. Each Goal Bank is created and managed by the Goal Bank author.

SEIS cannot edit the goals within the Goal Banks without the consent of the Goal author.

When a goal is added to your Goal Bank, a copy of the goal is sent to the SELPA.

If the SELPA approves the goal, it will be added to the **Teacher Generated Goals** Goal Bank.
This Goal Bank consists of all goals created and approved within your SELPA.

53

Personal Goal Bank

Once Goals have been added, they can be printed or your entire goal bank can be downloaded into Excel.

54

The IEP

Future IEP

Click the **Edit** icon to edit a form

Click the **Printer** icon to print a form
- Print in Spanish (if available)
- Print a Draft watermark
- To print multiple forms, check the box next to each form and click the Print Selected button

Click the **Generate E-Signature package** button to send an E-Signature package to applicable signers.

Click the **Preview** icon to view a form

Click the **Attachments** tab to add document

Click the **Comments** tab to enter a comment about the IEP

Print Queue

Click the **Printer** icon.

Select how the form should print.
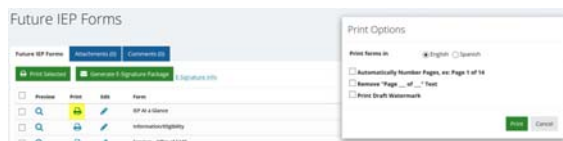
When the print job is completed, a notification will display on the **Print Queue** icon

Click the icon to view/print all print jobs within the last 72 hours.
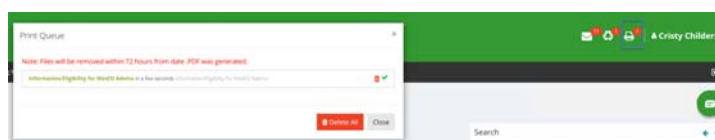
E-Signature - Pre-Meeting Forms

An e-signature package can be created to obtain a signature for a pre-meeting form.

The forms that can be included in the pre-meeting e-signature package are identified by a checkmark next to the form title.

Only **one** pre-meeting form can be selected as the consent on the signer's webpage is specific to the form that is being sent in the e-signature.

Click the **Generate E-Signature** button.

Click the **Pre-Meeting Form** button.
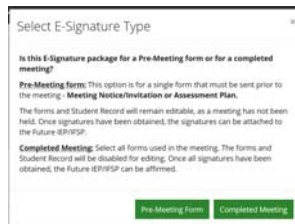
E-Signature - Pre-Meeting Forms

If the student has multiple Meeting Notices or Assessment Plans on the Future IEP, a drop down will display on the signer's module.

- The most recent Meeting Notice or Assessment Plan will be pre-selected.

Click in the drop down if a different Meeting Notice or Assessment Plan should be sent in the e-signature package.

The IEP and Student Record will remain editable while the e-signature is in process.

Once all signatures are obtained, the signed PDF can be attached to the IEP.

Generate E-Signature Package

Signer Full Name: **Title/Relationship to Student:**   **Email:**

Enter a Password for Signer(s) to access document ℹ

Password is sent via text msg or share directly with signer(s).

Select an Entry Date for: Invitation/Notice of Meeting A ℹ

01/22/2021 - 1:00pm

Should I be on the Future IEP?

The Future IEP should ONLY be used when holding the following types of meetings:

- **Initial**

- **Plan Review** (Formerly Annual)

- **Eligibility Evaluation** (Formerly Triennial)
  - An Eligibility Evaluation (Triennial) is NOT an Amendment.
  - An Eligibility Evaluation meeting is **only** to determine eligibility and disability.
    - If ANY IEP Plan fields are updated, Plan Review must be selected as well.

- **Plan Type changes** (IEP to ISP or ISP to IEP)

- **Initial CALPADS Affirm** (students who transferred in from a non-SEIS district)

All other types of meetings MUST be held as an Amendment.
- This includes Interim Placements. Interim Placements are NOT completed on the Future IEP.

Initial Evals

If the Initial Eval was not completed during the first meeting, what do I do?
- If the Initial Eval was not completed and Eligibility was not determined or accepted/declined, the student would remain in a Pending status and the IEP would remain "open."

- The IEP would NOT be affirmed as a Plan Type has not been determined. Affirming is ONLY for students that are Eligible and receiving services.

- Part 2 of the meeting would be held on the Future IEP. The IEP date should remain the ORIGINAL IEP date. The second meeting date would be documented on the Notes page.

What happens if the student is DNQ'd then later the parent accepts the Offer? Is that updated on the Future IEP or an Amendment?

The acceptance would be updated through the Future IEP:
- Parental Consent date remains the original date the parent consented for evaluation
- **The IEP Date is updated to the date the Offer was accepted**
- **The Initial Entry Start Date is the date the Offer was accepted**
- The Meeting Type remains Initial
- **Meeting Delay Code of 10 – Parent Refused to Consent would be selected**
- **The student's Plan Type is updated**
- The IEP/ISP/IFSP is affirmed

IEP / ISP Transition

If a student is transitioning from an IEP to an ISP or vice versa, the offer must be completed through the Future IEP.

If we will offer ISP services, do two separate meetings need to be held and affirmed?
- One meeting should be held. The meeting can include the offer of FAPE as well as the ISP offer. The outcome of the meeting is what is affirmed.
- If the Offer of FAPE was declined, that should not be affirmed as the student is not on an IEP and an IEP transaction should not be created.
- The decline of the IEP or ISP is documented within the meeting forms.

What if the IEP was accepted, then later the parent wants to accept the ISP?
- From the Future IEP, update the Meeting Date to when the ISP was accepted.
  - A student's Plan Type cannot be updated through an Amendment.
- Change the student's Plan Type to 200 and Affirm.

What if the Offer of FAPE and ISP is declined?
- If the student was on an IEP or ISP, submit a Student Change form to request that the student be Exited a 78 – Parent Withdraw.

Future IEP

Fields that should not be updated before the meeting takes place:

- IEP Meeting Date and Meeting Type
  - Updating the Meeting Date prior to the meeting can cause system errors, such as not being able to add an Amendment if one is needed prior to the upcoming meeting.

- Services
  - Do NOT Continue or Discontinue services until the changes are agreed upon.

Compliance Checks

Compliance Validations have been added to the IEP forms, to alert users if there are compliance issues that need to be addressed.

The Compliance Validations will not prevent you from saving the page or affirming the IEP, but they should be reviewed.

Managing Services

If a service is continuing to the next IEP year, the service should be continued by clicking the **Continue to New IEP** button.

The continue feature removes the "old" version of the service and replaces it with the new version of the service.

All fields are editable, except for the Service Code.

CALPADS only wants to receive one version of a service per student, so remove the previous version will not affect reporting.

Managing Services

If a service is being discontinued, click the **Discontinue Service** button.

Enter an End Date, which is the date the student stopped receiving the service.

The discontinued service will be marked Do Not Report.

Discontinued services should be deleted before the IEP is affirmed.

Ed Setting – Program Setting Projection

If a student's Program Setting will change within the IEP year, a projection must be entered so that an Amendment can be created when the student's Program Setting officially changes.

This is especially important for student's that turn 5 within the IEP year.

Program Setting (TK/Kgn or greater, ages 5-22):

----Select One----

(Note: Percentage of time is required for those that will be 5 and in Transitional Kindergarten/Kindergarten or greater within the duration of this IEP)

% of time student is outside the regular class & extracurricular & non academic activities

% of time student is in the regular class & extracurricular & non academic activities

----Select One----

☑ *IEP team is prepared to project additional Program Setting*

Start Date   **Program Setting** (TK/Kgn or greater, ages 5-22, within the duration of this IEP):

📅   ----Select One----

% of time student is outside the regular class & extracurricular & non academic activities

% of time student is in the regular class & extracurricular & non academic activities

----Select One----

SEIS

67

Managing Goals

Use the **Goal Title** field to help manage your goals.

The Goal Title field does not print on the IEP forms.
- When a goal is being projected for the next year, enter **Projected** into the Goal Title field.
- Once the goal is approved at the meeting, edit the title entering **Current**.
- After the Annual Review has been completed, edit the title entering **Reviewed** or **Delete after Affirm**.

This way you can easily see the status of the goals and which goals can be deleted after the IEP has been affirmed.

Goal

Goal Description   **Area of Need**

Projected Goal 21/22   Math

Measurable Annual Goal #

1

☐ **Projected Goal 21/22**
Goal
By [date], given [supports], [name] will compare properti
[] trials as measured by student work samples/teacher re

Updated By/On
Cristy Childers 08/25/2021

[Edit Goal] [Print Goal ▾] [Add to My Goals]

SEIS

68

Recycle Bin

Any item that is deleted by clicking the Delete icon will be sent to the Recycle Bin and can be restored for 7 days.

Click on the **Recycle Bin** icon at the top right of the page.
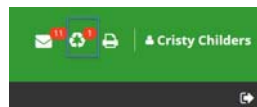
Click the **Restore** icon.
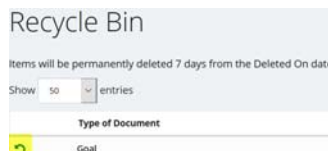
This will restore the item back to the Future IEP.

After 7 days or once the next meeting has been affirmed, the deleted items will be permanently deleted.

69

Transferring Goals

Goals can be transferred from your personal Goal Bank or the Goal Bank library.

To transfer a goal:
- Click the **Choose Goal** button
- Select a Goal Bank
- Select a Goal and Objective(s)
- Use the Copy feature to move the goal to the students IEP

70

Transferring Goals

Goals can be transferred from an IEP back to your personal Goal Bank!

Once the goal has been added, click the **Add to My Goals** button.

This will transfer the goal to your personal Goal Bank.

71

Affirming the IEP

Once the IEP has been held, it should be affirmed as soon as possible.

Affirming does not mean that the IEP was signed in agreement.

Affirming locks in place what happened at the meeting and should be reported to CALPADS.

Only the Case Manager will see the Affirm button for Eligible students.

To start the affirm process, click the **Affirm** button.

72

Affirming the IEP

Step 1: Verify Meeting Information

To ensure that the IEP/ISP/IFSP is affirmed with the correct information, each field must be checked, acknowledging that the Meeting Date, Meeting Type and Plan Type is correct.

It is also important to confirm that the Next and Last meeting dates are correct so that homepage Meeting Alerts are populated at the time the next meetings are due.

If Eligibility Evaluation ONLY is selected as the Meeting Type, a validation will run to verify if any of the IEP plan fields were updated. If so, the user will not be able to complete the affirm until Plan Review is also selected as the Meeting Type.

Once the IEP has been affirmed, the Meeting Date and Meeting Type cannot be updated.

Contact
1.866.468.2891
http://beta.seis.org

73

Affirming the IEP

Step 2:

A CALPADS Error check will run. All errors must be corrected before the IEP can be affirmed.

Fix all errors, then click the Return to Step 3 of 4: Correction of CALPADS Errors button.

Contact
1.866.468.2891
http://beta.seis.org

74

Affirming the IEP

Step 3:

Check the box next to each form that was used in this meeting.

Only the selected forms will display in bold on the student's Current IEP and can be included in an Electronic Signature.

All forms will be included in the affirm, the bold forms will indicate which forms were included in the meeting

SEIS

75

What To Do?

After the IEP is affirmed, if the incorrect Meeting Date or Meeting Type was selected:

- **If an Amendment has not been added**
  - o The Future IEP should be updated with the correct Meeting Date and/or Meeting Type and affirmed.

  - o Submit a Student Change form, selecting Manage IEP/CALPADS data to inform the district of the additional affirm. The district will need to remove the incorrect IEP so that it is not reported to CALPADS.

- **If an Amendment has been added or another IEP has been held**
  - o The IEP would not be able to be updated with the correct information as the IEP would not be able to be affirmed after an Amendment or another meeting has been held.

SEIS

76

Transfers from a non-SEIS District

If a student transferred from out of state or from a non-SEIS district, the Case Manager must complete an Initial CALPADS Affirm, to document the student's active/current IEP in SEIS.

This will allow the Case Manager to complete the Interim Placement as an Amendment to the student's active/current IEP.

This process also creates the IEP reportable transaction, required for the district to submit to CALPADS.

The Initial CAPADS affirm only requires that the CALPADS data, based on the students active/current IEP, is affirmed. The entire IEP does not need to be entered.

However, if the Progress needs to be entered for the student's current goals, the Goals should be entered as well. This will allow the provider to enter and affirm progress in SEIS.

SEIS

Initial CALPADS Affirm

On the Student Record, **CALPADS Student** page:
- Review each field and make the appropriate selection, based on the hard copy IEP.
- Click the Error Check button to verify that no errors exist.

Navigate to the **CALPADS Services** page.
- Add/update the student's services, based on the hard copy IEP.
- Click the CALPADS Error Check button to verify that no errors exist.

Navigate to the student's **Future IEP**.
- Click the Edit icon for the **Information/Eligibility** form.
- Update the Next/Last IEP and Eval date fields.
  - This will set the homepage notice for when the next Annual or Triennial is due.

Click the **Affirm** button.

In the **Affirm Remarks** textbox, enter: Student transferred from a non-SEIS district. Affirming CALPADS data only.

Do not select any forms as a meeting was not held in SEIS.

Attach the hard copy IEP to the affirmed/Current IEP.

Now that the IEP has been documented in SEIS, an Amendment can be added for the Interim Placement/30-day review.

SEIS

Current IEP

The Current IEP should be an exact replication of the hard copy the parent received.

All IEP forms that were selected during the affirm will display in bold.

If signature is obtained after the meeting is affirmed, it can be updated on the Current IEP.

An E-Signature package can be created after the IEP has been affirmed.

79

E-Signature

Once the meeting has been held and affirmed, an e-signature package can be created and sent for signature.

From the student's Current IEP, select the forms that were included in the meeting.

Click the **Generate E-Signature** button.

80

Adding Signers

Enter the signer's information and click the **Add Signer** icon (up to 20 signers can be added).

Cell phone is not required, however the password to the e-signature package will be sent as a text message to the signer's cell phone. If the cell phone number is not entered, the provider will need to share the password with the signer.

In the Name field, keyword search for the student's providers! The provider's name, provider type, email and cell phone number will pull directly from their SEIS profile!

Enter a password that will be sent to the signer(s) in order to view/sign the forms

SEIS

Student Info Box

If an E-Signature is in process, the **Go to E-Signature** icon will display in the student information box.

This is an easy way to identify that an E-Signature is pending signature.

Click the icon to be directed to where the E-Signature was created.

School: Fun High School
Case Manager: Cristy Childers
Meeting Date (Future IEP): 12/27/2019
Current/Affirmed IEP: 12/27/2019
Affirmed On: 10/02/2020

Go to E-Signature
Return to Student IEPs

SEIS

Completed Signatures

Once all signatures have been obtained, the status on the homepage notice will update to **Ready**.

The Case Manager can attach the signed document to the student's Current IEP.

Click the **Go to E-Signature** icon to be directed to where the E-Signature was created.

Once the E-Signature process is completed, by attaching the signed document to the student's Current IEP, the notice will automatically be removed.

E-Signature - Current IEP

Click the **View E-Signed Document**, then click the **Add Attachment** button.

This will attach the signed PDF document to the student's Current IEP or Amendment.

Expired Packages

If the package goes over the 7-day timeline and expires, a PDF will be generated to capture the signatures that were obtained.

The obtained signatures can be attached to the IEP or Amendment.

Click the **View Expired Document** button.

Click the **Attach** button to attach the signatures that were obtained before the package expired.

A new package can be created, if needed, to capture the remaining signatures, if needed.
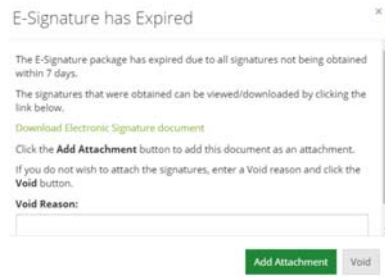
Historical IEPs

The Historical IEPs page displays all affirmed IEPs.

Click the View/Print icon to be directed to the IEP.

	Type	Meeting Date	Affirm Date	attestedBy	Purpose(s)	Signature	Comment	Amendments	Attachments
🖨	Current	06/05/2020	06/16/2020	State Forms	IEP Annual Meeting,	Yes		Yes	No
🖨	Historical	06/04/2020	06/16/2020	State Forms	IEP Triennial Evaluation,	Yes		No	No
🖨	Historical	06/01/2020	06/02/2020	State Forms	IEP Part B Initial Evaluation,	Yes		No	No

Amendments

Affirmed Information

Meeting Date: 08/24/2021   **Affirmed Date:** 08/25/2021

Meeting Type: Annual Meeting   **Affirm Remarks:**

Plan Type: IEP   **Attachments:** Yes

Signature: ● Yes ○ No   **Amendments:** No

[Affirmed Forms] [Attachments (3)] [Amendments (0)] [Comments (0)]

[+ Add Amendment]

87

Adding an Amendment

Two validations will run:

1. **To verify that the IEP transaction exists.**
   - If the IEP transaction does not exist, submit a Student Change form to request that the student's IEP be "adopted."

2. **To verify that the Future IEP date has not been updated.**
   - If a new meeting has been held, the IEP should be affirmed.
   - If a meeting has not been held, the IEP date must be changed back to the Current IEP date.

An IEP Transaction does not exist

An Amendment cannot be added until an IEP transaction is adopted/created for the student.

Click the **Student Change Form** button and submit a request to the District, to have an IEP transaction created for this student.

[Student Change Form] [Cancel]

⚠ **ALERT**

The Future IEP meeting date has been updated.

The student's Future IEP date should match the Current IEP date, until all Amendments have been created and affirmed.

If the Future IEP date was updated in error or to prep for the next meeting, the Future IEP date must be changed back to the Current IEP date, in order to continue with the Amendment process.

If a new meeting was held, it must be affirmed before the Amendment is added.

[View Future IEP] [Cancel]

88

Amendment Date

When an Amendment is added, the Amendment date is the same as the Meeting date.

If a change needs to be made to an IEP that was held that day, the Future IEP can be updated and reaffirmed.
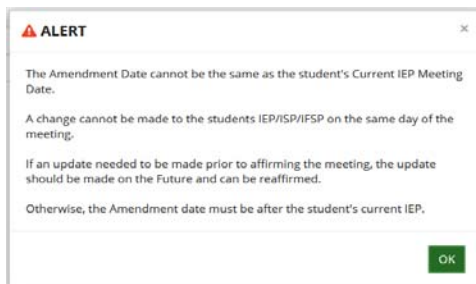
Amendment Purpose

An Amendment is created for any purpose outside of an Initial, Plan Review, Eligibility Evaluation and Plan Type changes.

The Amendment Purpose field has been expanded to include the "Additional Purposes" on the Information/Eligibility form.

'Other' can be selected for a purpose that is not listed.

The Amendment forms link to the Future IEP forms, so that the Future IEP and Student Record have the most updated information.

Editing an Amendment

If an IEP form needs to be edited, scroll to the bottom of the form and select Yes for 'Does this Amendment require additional forms.'

The Amendment forms link to the Future IEP forms, so that the Future IEP and Student Record have the most updated information.

Amendments

There are specific fields that **cannot** be updated through an Amendment.

These fields have been made read-only to ensure they are not updated.

If any of these fields need to be updated, it would require an IEP meeting:
- 14.20 - Meeting Type
- 14.17 - Special Education Referral Date
- 14.19 - Initial Evaluation Parental Consent Date
- 14.24 - Education Plan Type Code (from IEP to ISP and vice versa)
- 14.45 - Parental Involvement Facilitation Code

Meeting Type:
☐ Initial
☑ Plan Review *(formerly "Annual")*
☐ Eligibility Evaluation *(formerly "Triennial")*

Additional Purpose of Meeting (If Needed):
☐ Transition
☐ Pre-Expulsion
☐ Interim
☐ Other

Managing Services

If a service is changing between IEP years, the service should be Amended.

To Amend a service:
- Click the **Amend Service** button
- Enter an End Date for that version of the service (not IEP end date)
- The Start Date of the new version of the service will populate to the day after the End Date of the previous version.

The Amended service will automatically be marked Do Not Report and the Amended tag will display on the service.

93

Affirming an Amendment

After all edits have been completed, the amendment should be affirmed.

Click the **Affirm** button to initiate the affirm process.

94

Forms in Use

If a user is on an IEP form (through the Future IEP or Amendment), you will receive a notice and are unable to complete the affirm until the forms are not in use.

Since the Amendment forms link to the Future IEP forms, if data is being updated before the Amendment affirm takes place, inaccurate data will be pulled into the Amendment transaction.

Affirming an Amendment

Amendment Purpose: What was selected on the Amendment form

Additional Purpose of Meeting: The additional purpose that was selected on the Information/Eligibility form

Signature: Was the Amendment signed.

Affirming an Amendment

A CALPAD Services error check will run, to ensure that all services are error free.

Affirming an Amendment

Select the forms that were used for the Amendment meeting.

Click the **Submit** button

Affirmed Amendment

To view your affirmed Amendment, go to the student's Current IEP and click on the Amendments tab.

Click the Printer icon to:
- View/print the forms
- Add Attachments
- Add Comments
- Send an E-Signature package

99

Progress Reports

100

Progress Reports

To access the Progress Reports page, go to Student IEPs and click on the **Write Progress** icon

To view previously affirmed Progress Reports, click on the **Print Progress** icon

101

Progress Summary Page

From the Progress Summary page you can:
- Write progress on Goals
- Affirm Progress Reports
- Print historical Progress Reports
- See when the last Progress Report was affirmed

102

Writing Progress

To write progress on Goals, check the box next to the Goal(s) and click the **Write Progress on Selected Goals** button

Writing Progress

There are 3 standard Progress fields and an Annual Review field. If you district requires additional progress to be written, click the **Add Progress Report** button.

Once progress has been written, select Yes in the **Ready for PR** field and click Return to PR Summary page.

Affirming Progress

The Case Manager should wait until progress has been written for all goals before affirming.

Only goals with a Yes in the Ready for PR column will pull into the affirmed Progress Report.

Click the **Affirm PR** button.

Printing Progress Reports

To print your affirmed Progress Report, click the **Print Affirmed PR** button.

To print previously affirmed Progress Reports, click the **Print Historical PRs** button.

DRDP

107

DRDP

The DRDP icon will display for students ages 0-6.

DRDPs only need to be completed for students ages 0-5, excluding TK.
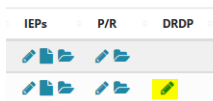
To add a DRDP, click the **Add DRDP** button.

108

54

DRDP

The demographic fields pull from the Student Record

When field 9 is selected, the appropriate rating record will display.

The Adaptations pull from the student's IEP/IFSP.

109

Transferring DRDP Data from SEIS to DR Access Reports

In spring 2020, SEIS integrated with DR Access Reports, making it easier and faster to produce DRDP reports.

Completed/affirmed DRDP (2015) records will be automatically transferred every night into your DR Access Reports account.

On the DRDP form, the Assessors name and email address will pull from their SEIS user profile. If the email address that was used to create your DRDP account, the email address can be updated.

110

Searches

111

Filtering Students

Criteria

Adding filters will allow you to narrow down the results to a specific group of students.

Filter by any field on the student record, including custom fields created by the district or SELPA.

The search is an AND search. Meaning that only the students that match all criteria will pull in.

112

56

Column Options

Column options allow you to see specific information about the group of students.

Type of Report

Select canned reports such as: Current Service Report, ESY service Report, DRDP Report.

Select Columns for Report

Select any field from the Student Record or custom Field.

SEIS

Current Service Report

The Current Service Report is one of the most common searches.

This report will pull all services from the services grid.

There will be one row per service, displaying all service fields.

Code	Service	Marked DNR	Status	Start Date	End Date	Provider	NPA	Delivery	Session Based	Minutes / Session	Sessions / Frequency
240	Service coordination	No	Discontinued	10/01/2015	06/03/2016	100 District of Service			Yes		
900	Other special education/related services	Yes	Amended	10/01/2019	08/05/2021	400 Nonpublic agency (NPA) under contract with SELPA or district			Yes	60	1
415	Language and speech	No		05/06/2021	05/05/2022	120 SELPA		1	Yes	25	1

SEIS
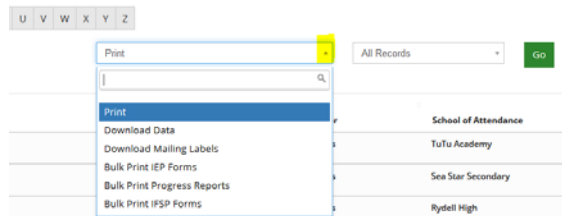
Tasks to Perform

From the Search results, you can:
- Print
- Download the data into Excel
- Download Mailing Labels
- Bulk print IEP forms and Progress Reports
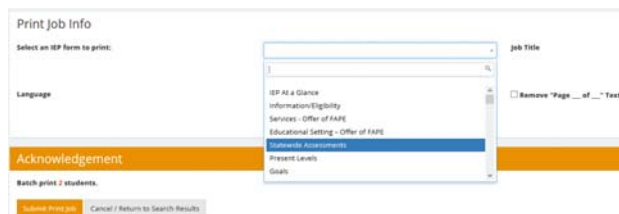
115

Bulk Printing

To Bulk Print IEP forms:
- Select the students to be included in the bulk print
- Select **Bulk Print IEP forms**
- Click **Go**
- Select an IEP form.
- Click the **Submit Print Job** button

116

58

Bulk Printing

Providers can also bulk print IEP forms and Progress Reports right from the Students section of the upper navigation bar.
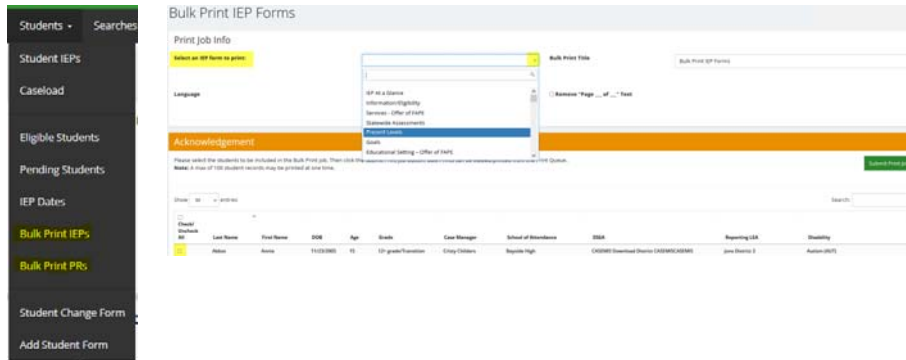
117

Mailing Labels

To print mailing labels, **select Download Mailing Labels**, from the task drop down.

Mailing labels pull from the Parent 1 or Parent 2 mailing fields on the Demographics page of the Student Record.

Select how you want the mailing label to display, then click **Download**.

118

Additional Reports
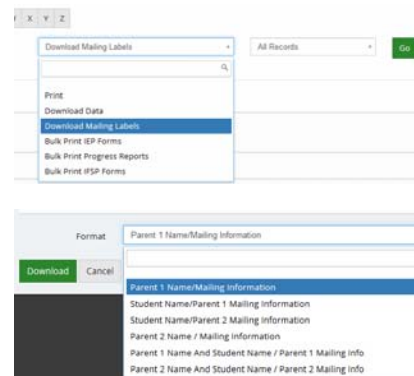
119

Duplicate Services

Reports → Duplicate Services Report

- This report pulls in any student that has duplicate services.
- A duplicate service is the same Service Code and Provider Agency.
- Simply check the box of one of the duplicate services and click the Mark Services Do Not Report button.

120

Supplemental Aids

Reports → Supplementary Aids

- This report pulls the student's Supplementary Aids from the Services form on their Future IEP.
- Click the Generate Report button
- The report can be downloaded into Excel

Reports

This report will produce a list of Supplementary Aids and Services from the Future IEP Services form, for all eligible and pending status students.

Generate Report

	Date	Total Students	Download
❌	08/25/2021, 11:00:27 am	4	TXT | XLS | CSV

Goals

Goals → Goals Report

- Providers can generate a Goals Report.
- The report pulls the student's Goals and Progress from the Goals form on the Future IEP.
- The report can be downloaded into Excel.

Reports

This report will produce a list of all student Goals and Progress from the Future IEP Goals Form. The report will only include Eligible and Pending students.

Generate Report

	Date	Total Students	Download
❌	08/25/2021, 11:01:01 am	38	CSV

TOMS

The TOMS report pulls in all Eligible students in grades 3-8 and 11 for ELA and Math or grades 5, 8, 10, 11, and 12 for Science.

The data pulls from the student's Future IEP – Statewide Assessments form.

The **Student download** includes the additional SEIS Demographic columns.
The **TOMS download** is the file that must be uploaded as it is in the required file format.

Generate Report

	Date	Total Students	Student Download	TOMS Download
✖	08/25/2021, 11:01:35 am	11	TXT | XLSX	XLSX

◯ SEIS

Contact
1.866.468.2891
http://beta.seis.org

123

ELPAC

The ELPAC report pulls all Eligible students where **English Learner = Yes**, **Grades K-12**, and **must** have Initial ELPAC or Summative ELPAC selected on the IEP form.

The report data pulls from the student's Future IEP – Statewide Assessments form.

The **Student download** includes the additional SEIS Demographic columns.

The **ELPAC download** is the file that must be uploaded as it is in the required file format.

Generate Report

	Date	Total Students	Student Download	ELPAC Download
✖	02/24/2021, 3:05:49 pm	10	TXT | XLSX	XLSX

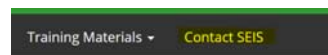**◯ SEIS**

Contact
1.866.468.2891
http://beta.seis.org

124

62

SEIS Help Desk
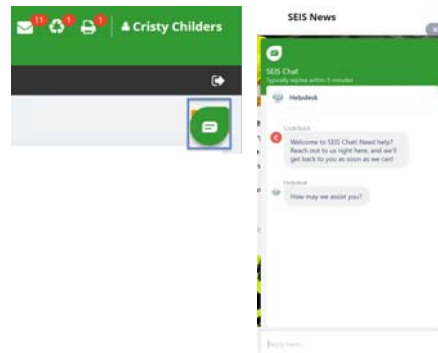
How to Contact the Help Desk

Emailing the SEIS Help desk though the **Contact SEIS** option provides the staff with information about your User Level, SELPA, District and computer.

SEIS Chat is available for Provider level users!

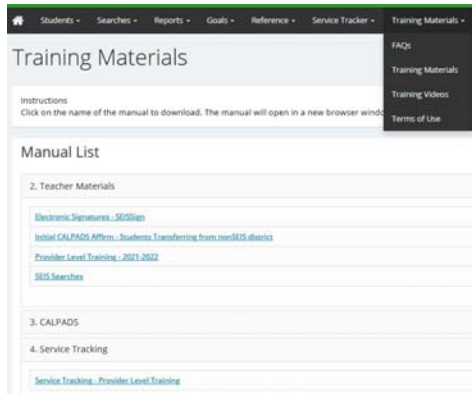Click on the **Chat** icon to be directed to an agent.

Training Materials

View our FAQs and Training Materials to find answers to your most common questions!

Daily Tasks

The Homepage notices need to be monitored DAILY.

Review your Pending Students list

Affirm IEPs and Amendments as soon as possible

Submit a Student Change form as soon as Eligibility is determined

Submit a Student Change form as soon as a student exits/transfers

Contact
1.866.468.2891
http://beta.seis.org

Thank You!

Please do not hesitate to contact the SEIS Help Desk with any questions!

seisupport@sjcoe.net

SEIS

Contact
1.866.468.2891
http://beta.seis.org

129