Managing the Electronic Record

The SEIS Mission

To tell the story of the student through the IEP process.
Have accurate and up-to-date data for quality data management purposes.
Collect and report transactional data to CALPADS.

Each IEP saved in SEIS should be an accurate representation of the IEP Meeting.

By following the SEIS recommended best practices you will have:
• Historical Information: An accurate “electronic paper trail” for every IEP held for every student in SEIS.
• Up-to-Date Information: The Future IEP and Student Record will have accurate, current data that can be used for all necessary reports; local, state and federal.
• Transactional data saved and stored at the completion of the transaction.
What is Transactional Reporting?

When is a transaction created?
• Affirming an IEP (with Initial, Annual or Triennial)
• When a student is Exited (except for exit reasons: 71, 74, 76 & 77)
• When a student’s status is changed to DNQ/Not Providing Services (Plan Type 700/800/900)
• When a students Plan Type is changed to 300 (Pending Initial Evaluation)
• When specific fields in an Amendment are updated

It is imperative that Case Managers affirm IEPs and Amendments as soon as meetings are completed and submit student change requests as soon as Eligibility is determined or a student is exiting. This is the only way the student data will be reported going forward.

Reportable Amendments

If any of the following fields are updated via an Amendment, an Amendment reportable 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
- 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
The Initial Referral Process

Pending Initial Eval

Once Parent Consent is received:

- The SEIS record is added
- The Meeting Type must be updated to 30 Pending Initial Eval
- The students Plan Type must be updated to 300 Pending Initial Eval
- SSID should be requested
- This will create the Pending/300 reportable transaction
Scenarios

What if the student moved in the middle of the assessment?
The student should be reported to CALPADS as a Plan Type 300
If the Assessment goes over the 60-day timeline due to the student transferring, the new district will select Meeting Delay Code – 50 Transfer.

The assessment was held and the student qualifies, what do I do?
The students Plan Type would be updated to 100 and Eligibility would be updated to Eligible

The assessment was held and the student did not qualify or 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 or Not providing Services

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 are Pending their Initial Evaluation should be listed as Pending.

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

The IEP
IEP Lifecycle

Admin creates new record
Student Record
Enters student/parent information & assigns Providers

IEP team holds the meeting using the Future IEP forms

Case Manager Affirms the IEP, creating the Current IEP
Creates the “Transaction” for reporting

If there is an existing Current IEP
The previous IEP becomes Historical. It is placed into the Historical IEP section

The data on the Future IEP remains and is editable.

Future IEP

The Future IEP is the editable copy of the IEP. The Demographic and CALPADS fields link to the Student Record.

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

- IEP Meeting Date
  - 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 make Continue, Amend or Discontinue services until the changes are agreed upon.
  - Users can utilize the Blank Grids option to write in proposed services or changes.
IEP Meeting Type Updates

The only allowed IEP Meeting Types are: Initial, Annual or Triennial

- If the meeting is an Initial, ONLY Initial can be selected.
- If an Annual and Triennial is held at the same time, both Annual and Triennial can be selected.
- Services are ONLY included with Initial and Annual IEP transaction
- All other meeting types/reasons are considered an Amendment to the IEP.

CALPADS business rules are that a Triennial meeting is only to determine the student’s eligibility. Services should not be added or updated with a Triennial meeting. Therefore, services are not included in a Triennial transaction.

If services are added or updated during the Triennial meeting, the meeting MUST be considered an Annual as well.

The next Annual IEP date would not need to be updated or “reset” as CALPADS allows multiple Annuals to be submitted within a year.

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
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.

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.
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

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.
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.

Step 1:

- Verify the Meeting Date
- Document if the IEP was signed
- Verify the correct Meeting Type(s) are selected
- Verify the Other Meeting Dates

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

Affirming the IEP

Step 3:
Check the box next to each form that was used in this meeting.
The selected forms will display in bold on the student’s Current IEP. All forms will be included in the affirm, the bold forms will indicate which forms were included in the meeting.
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
  - The IEP can be reaffirmed with the correct Meeting Date or Meeting Type.
  - 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
  - Submit a Student Change form, to inform the district of the mistake so they can reach out to the SEIS Help Desk for assistance.

IEP Transaction

The IEP transaction will display the following information:

- The Meeting Type selected on the Information/Eligibility form
- The Meeting Date
- If the IEP was signed at the time of the affirm
- The date the IEP was affirmed (Transaction Created date)
- The Transaction Type will display Affirmed IEP
**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.

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**Current Affirmed Forms**

**Affirmed Information**

- **Meeting Date:** 01/01/2023
- **Meeting Type:** Initial Evaluation
- **Plan Type:** IEP
- **Signature:** Yes ✅ No

**Affirmed Forms**

- Amendments
- Comments

**Generated E-Signature Package**

**Signature Info**

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**Contact**

1.866.468.2891
seissupport@sjcoe.net

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**Current IEP**

From the Current IEP, the user can add an Amendment to:

- Hold Continuation meetings
- Make a change to the IEP
- Make a correction (clerical error) to the IEP
- Hold a Transition meeting
- Hold an Interim Placement or 30-day Review
- Hold an Exit meeting
- Update IEP forms with language translation

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**Contact**

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seissupport@sjcoe.net
Historical IEPs

As IEPs are affirmed, the students Historical IEP list will grow.

Users can view any historical IEPs from the Historical IEPs page by clicking on the View/Print icon.

<table>
<thead>
<tr>
<th>Show</th>
<th>ID</th>
<th>Name</th>
<th>Type</th>
<th>Meeting Date</th>
<th>Affirm Date</th>
<th>atheistically</th>
<th>Purpose</th>
<th>Signature</th>
<th>Comment</th>
<th>Amendments</th>
<th>Attachments</th>
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<tbody>
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<td>09/10/2020</td>
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<td>State Forms</td>
<td>IEP</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

Amendments
Adding an Amendment

From the Current IEP, click on the Amendments tab

Click the Add Amendment button

A validation will run to ensure that the IEP transaction exists. If not, the Amendment will not be able to be added.

Submit a Student Change form to request that the students Current IEP be “adopted.”

Amendment Date & Purpose

When they Amendment Date is added, a validation will run to ensure that the Amendment date is AFTER the current IEP date.

The Amendment Purpose is documenting the purpose of the meeting or update.

If Other is selected, the text box will become editable to enter a description.
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.

Updating IEP Forms

There are specific fields that cannot be updated through an Amendment. If these fields are updated, it will result in CALPADS error SPED0438.

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
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.

Updating a Reportable Field

When a reportable Amendment field is updated, it will generate a transaction.
Affirming an Amendment

After all edits have been completed, the amendment should be affirmed. Click the **Affirm** button to initiate the affirm process.

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

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

**Correction of CALPADS Errors**

Congratulations!

There are no CALPADS errors. Click Continue to complete the affirm process.

Continue  Cancel
Affirming an Amendment

Select the forms that were used for the Amendment meeting.
Click the **Submit** button

<table>
<thead>
<tr>
<th>Checkbox</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>IEP At a Glance</td>
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<tr>
<td></td>
<td>Services - offer of HEP</td>
</tr>
<tr>
<td></td>
<td>Educational Setting - offer of HEP</td>
</tr>
</tbody>
</table>

Affirmed Amendment

To view your affirmed Amendment, go to the students 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
Amendment Transaction

The Amendment transaction will display the following information:

- Amendment Date
- Date Amendment was affirmed (Transaction Created)
- Transaction Type (Amendment)
- All other fields relate to the IEP transaction

If a student transfers into the district from out of state or from a non-SEIS district, the student's current/active IEP needs to be documented in SEIS to establish their IEP and to submit the IEP data to CALPADS.

It is only required that the CALPADS fields are entered, including services, to establish the IEP.

After the IEP has been affirmed, an Amendment can be created to document the Interim Placement or 30-day Review.

The Initial CALPADS Affirm documentation can be found in the Help Center → Training Materials section.

Contact
1.866.468.2891
seissupport@sjcoe.net
Thank You!

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

seisupport@sjcoe.net