British Columbia | MyEducationBC

Student Services

Inclusive Education Plans

January 2018 v1.0

FUJITSU

Version History

Version	Date	Description
v1.0	Jan 8, 2018	Initial published version

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Table of Contents
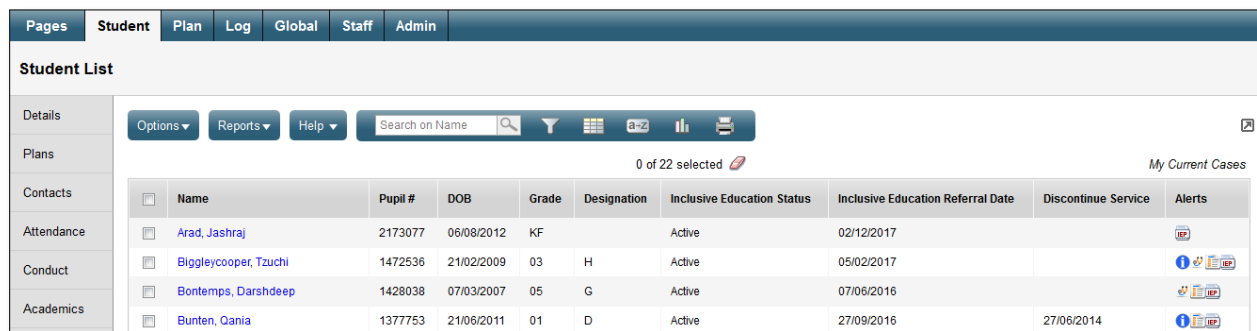
1.0   Introduction

The Student Services module in MyEducation BC has been redesigned. Student support staff are no longer required to complete steps in a workflow to produce a support plan for a student. A simplified interface will allow users to write support plans and review student progress without the system dictating an order of data to be entered. The solution is flexible enough to align with district practice, while capturing all of the required data elements for the Student Plan. Users will be able to easily identify the Plan that they are currently working on. The plan status will be determined by the start and end dates of the plan.

2.0   Navigating in the Special Education View

Users with the role of *Student Services – School* have access to Student Services – School view to manage support plans for students at a defined school. Users with the *Student Services - District* role have access to the Student Services - Organization view and Student Services – School view to manage student services for all schools in the district.
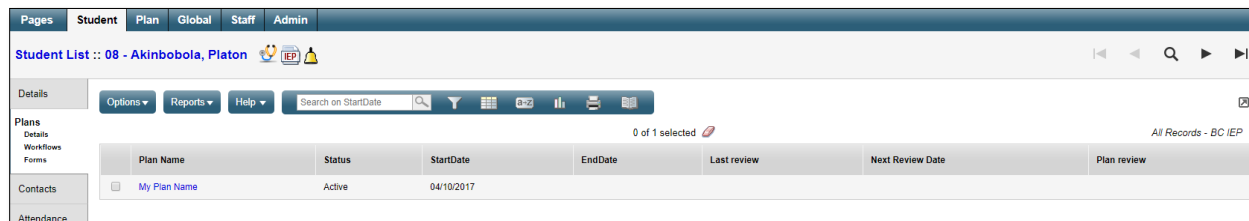
2.1 Student Top Tab

The Student TT provides access to the list of students enrolled in student services. The default filter is, *My Current Cases*, displaying those students for which the user is the designated case manager. The *All Records* filter will display all of the students enrolled in student services. A student services field set is provided which can be modified to include other relevant fields for the user.

Name	Pupil #	DOB	Grade	Designation	Inclusive Education Status	Inclusive Education Referral Date	Discontinue Service	Alerts
Arad, Jashraj	2173077	06/08/2012	KF		Active	02/12/2017		
Biggleycooper, Tzuchi	1472536	21/02/2009	03	H	Active	05/02/2017		
Bontemps, Darshdeep	1428038	07/03/2007	05	G	Active	07/06/2016		
Bunten, Qania	1377753	21/06/2011	01	D	Active	27/09/2016	27/06/2014	

- o **Details** side tab – displays the basic student demographic details.
- o **Plans** side tab – displays a list of the student's plans.
    - ▪ **Details** – Provides access to the Plan.
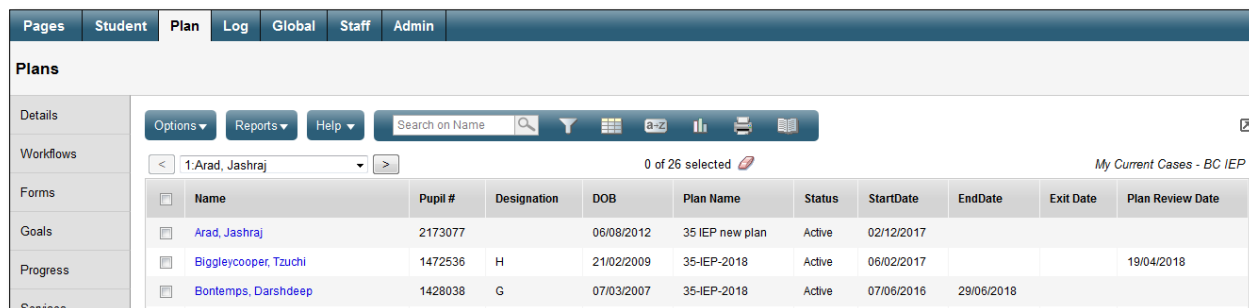   - ▪ **Forms** – Provides access to the forms created for a given plan.

The removal of the workflows eliminates the automatic entry of data in the forms. Schools wishing to capture information related to School based team meetings and services provided by outside agencies can do so by manually entering data into the appropriate form. However, this information will not be reported on. Schools may also use the LOG to capture this information. All data currently stored in the forms will be accessible.

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o **Contacts** side tab – Displays the list of the student contacts. Contacts with *Include on Plan* checked and *Parent or Guardian? = Y* will print on the student Plan.

o **Attendance; Conduct; Transcript; Assessments; Schedule; Membership; Transactions; Documents; Snapshots** – These tabs are the same as the school view, each provide further details on the student.

2.2 Plan Top Tab

The Plan TT lists the student Plans. Clicking on the student name in a given row will open the details of that particular Plan. The default filter is *My Current Cases*, displaying the plans for which the user is the designated case manager. The *All Records* filter will display all of the plans in student services. Other filters can be applied to view plans based on the status. A student services field set is provided which can be modified to include other relevant fields for the user.
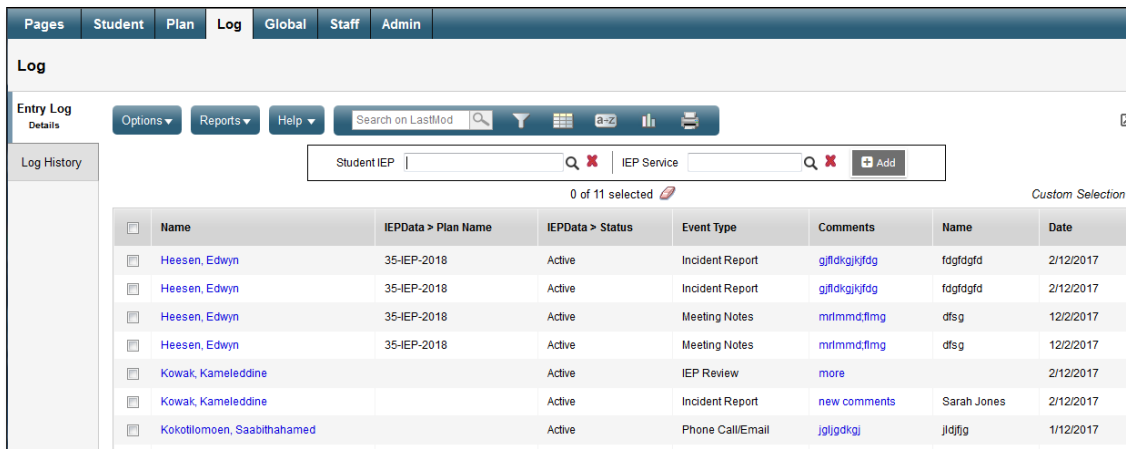

o **Details** – Provides the Plan details of the selected record. A Plan in progress can be accessed to edit from here.

o **Forms** – Provides access to the forms associated with the selected record. These are historical records tied to the retired workflows. Users can manually enter information in the forms but it will not print on the report or display in the Plan.

- o **Goals** – Provides quick access to the goals identified Plan.
- o **Progress** – Allows access to the goal progress reports created for the Plan
- o **Team Members** – Shows the identified school based team members for the Plan.
- o **Access Log** - Displays those users who have accessed the selected Plan

2.3 Log Top Tab

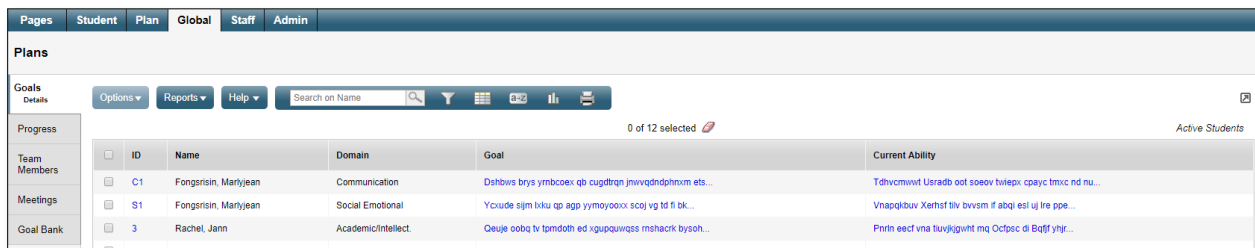The Log TT is a place to record interactions between the support team and the student and family.

- o **Entry Log** – a place to record interactions with the student and family, meetings and the notes from the review.
- o **Log History** – displays a list of all log entries. Can be sorted, filtered and printed.

2.4 Global Top Tab

The Global TT provides a view to all student records in a variety of categories. This view provides the means to generate reports in pdf or csv formats using the quick reports feature.

- o **Goals** – Gives a view of all students and their assigned goals.
- o **Progress** – Will show all students' Plan goal progress report records.
- o **Services**

    Delivery Logs – Lists all of the entries in the Log

- o **Team Members** – Lists the students and team members. These fields can be sorted to show the student and all associated team members or team members and the students associated with them.
- o **Designations** – Lists the students with designations
- o **Goal Bank** – Contains the user's banked goals and associated objectives if created in the Plan process and saved.
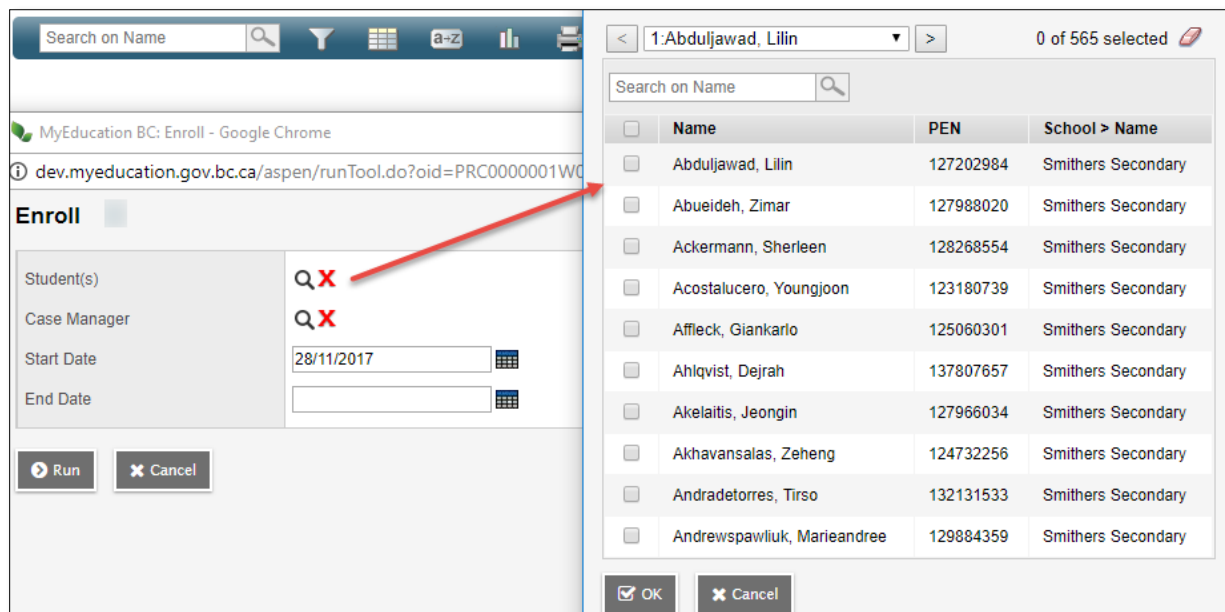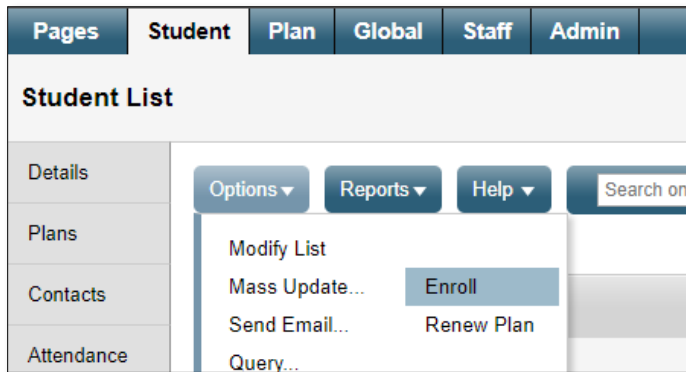
2.5 Staff Top Tab

The Staff TT provides a listing of staff members with Special education checked in their staff details.

3.0 Enrolling a Student in Student Services

A student must be enrolled in Student Services before a Plan can be developed for the delivery of support services.

Student Services – District or School view > Student TT > Options > Enroll

- **Student(s)** - Use the picklist to select the student or students. Search by name or use the page navigation at the top. Only students that are not currently enrolled in Student Services will display on the list.
- **Case Manager** – Select a Case Manager for all students selected (optional). The staff member must be identified as a Case Manager to appear on this list.
- **Start Date** – Date of enrollment in Student Services. This date becomes the start date for the Draft plan. All Plans require a start date.
- **End Date** – Date that the plan will end. This is an optional entry at the time of enrollment, but if your district policy is to create a new plan each year then it would be advisable to enter the end date now. A plan must have an end date before a new plan can be started.

4.0   Student Plans

The status of a student plan is determined by the start and end date of the plan.

- Active – the current plan used day-to-day to support the student
- Draft – a plan being prepared to support the student in the future
- Previous – a plan used to support the student in the past

Upon enrollment in Student Services, a Draft Plan is created. If the start date is a current or past date and the plan has been saved, the Plan will be Active.

4.1 Completing a Plan
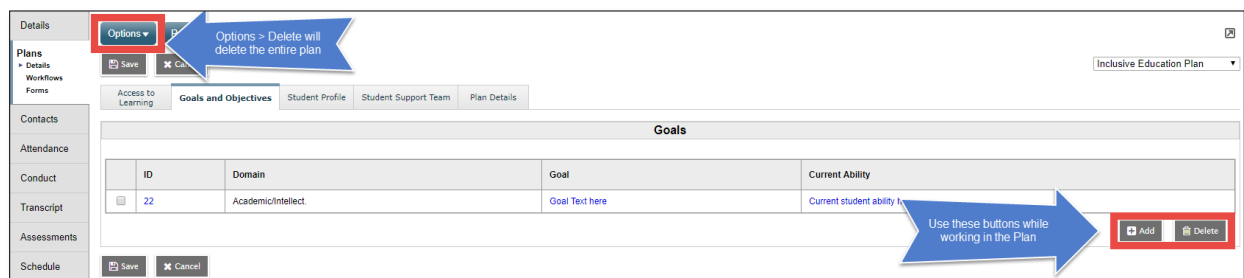
Student Services – District/School > Student > Plans > Details

Student Services – District/School > Plan > Details

There are five tabs in the Plan Details, all or a portion of the information can be completed as is appropriate for the student. Information can be added in any order, at any point in time.
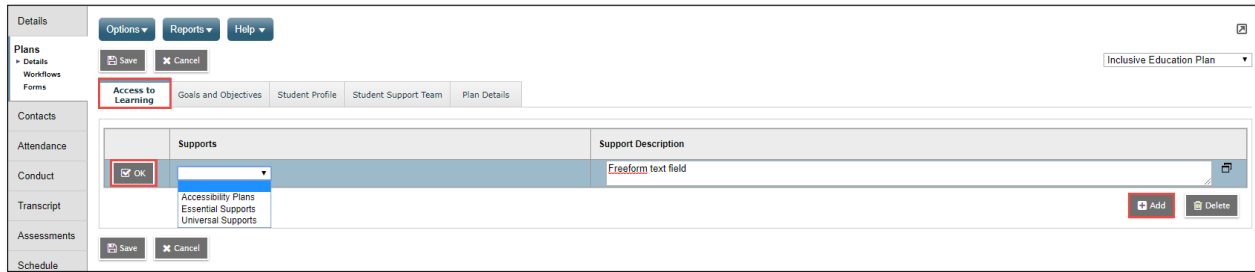
To view historical Plan records, select the Legacy BC IEP form from the template dropdown, on the top right of the screen. This template is read only. Information may be copied and pasted into the new plan if desired. Legacy plans can be "Renewed" using the Inclusive Education Plan Refer to Section 5.0 for instructions.

Note: Student Services – District users have access to the Options menu at the top left of the screen, and the ability to delete a Plan when necessary. Use this menu with caution as *Options > Delete* will delete the Plan, not the item within the plan.
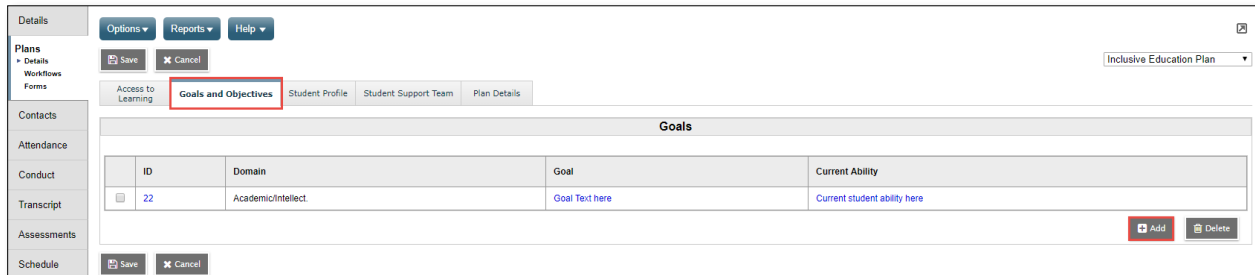
4.1.1 Access to Learning

The Access to Learning tab allows individual supports to be identified

- Click the **Add** button at the bottom right of the screen to enter

- **Support** - select the appropriate support type from the dropdown list. Additional support types can be added to the District reference table for Accommodation Categories by persons with District Support (Help Desk/Level 1) role.

- **Support Description** – a freeform text field to describe the support

- Click OK

- Save the changes to the plan.

4.1.2 Goals and Objectives
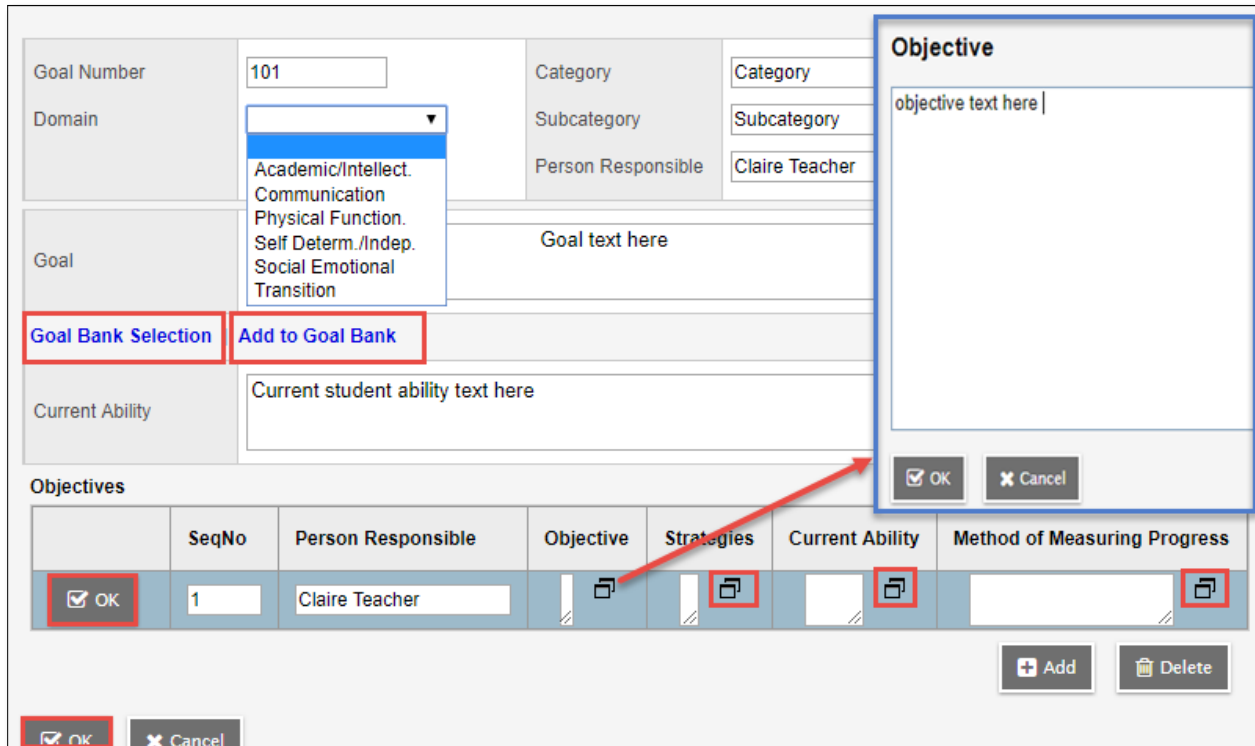
Enter Goals and Objectives for the student in this tab using the **Add** button at the bottom right, or remove them using the **Delete** button.

In the popup window, existing goals can be selected from the Goal Bank using the blue hyperlink *Goal Bank Selection* or new Goals created.

When creating a new Goal, it can be added to the Goal Bank using the *Add to Goal Bank* blue hyperlink. Refer to section 10.0 Working with User and District Goal Banks for instructions on working with the Goal bank.

- **Goal Number** – Enter a number for the goal

- **Domain** – Select a Goal Domain from the drop down selection

- **Category** – Enter a Category per district practice

- **Subcategory** – Enter a Subcategory per district practice

- **Person Responsible** – Enter a name or title as appropriate

- **Goal** – Enter the goal in freeform text

- **Current Ability** – Enter the current ability of the student in relation to the goal as freeform text.

- **Objectives** – Define the objectives for the student in relation to the goal using the **Add** button. Objectives can be deleted using the **Delete button**. Each objective is assigned separately and the following fields may be filled in as appropriate.

  o **SeqNo** – sort order for the objectives, lowest number is priority

  o **Person Responsible** – Enter the name or title of the person responsible for the objective as appropriate

  o **Objective** – Click the pop up window icon to display the freeform text entry, click **OK** in the pop up when complete

  o **Strategies** - Click the pop up window icon to display the freeform text entry, click **OK** in the pop up when complete

  o **Current Ability** - Click the pop up window icon to display the freeform text entry, click **OK** in the pop up when complete

- o **Method of Measuring Progress** - Click the pop up window icon to display the freeform text entry, click **OK** in the pop up when complete
- o **Click OK** to save each objective

4.1.3   Student Profile

The Student Profile tab provides six freeform text fields to provide an overview of a student. These may be completed per district practices.

4.1.4   Student Support Team

The Student Support Team allows individual team members to be added to the Plan by clicking the **Add** button at the bottom right, or removed using the **Delete** button. Names can be selected from the picklist or entered free form.
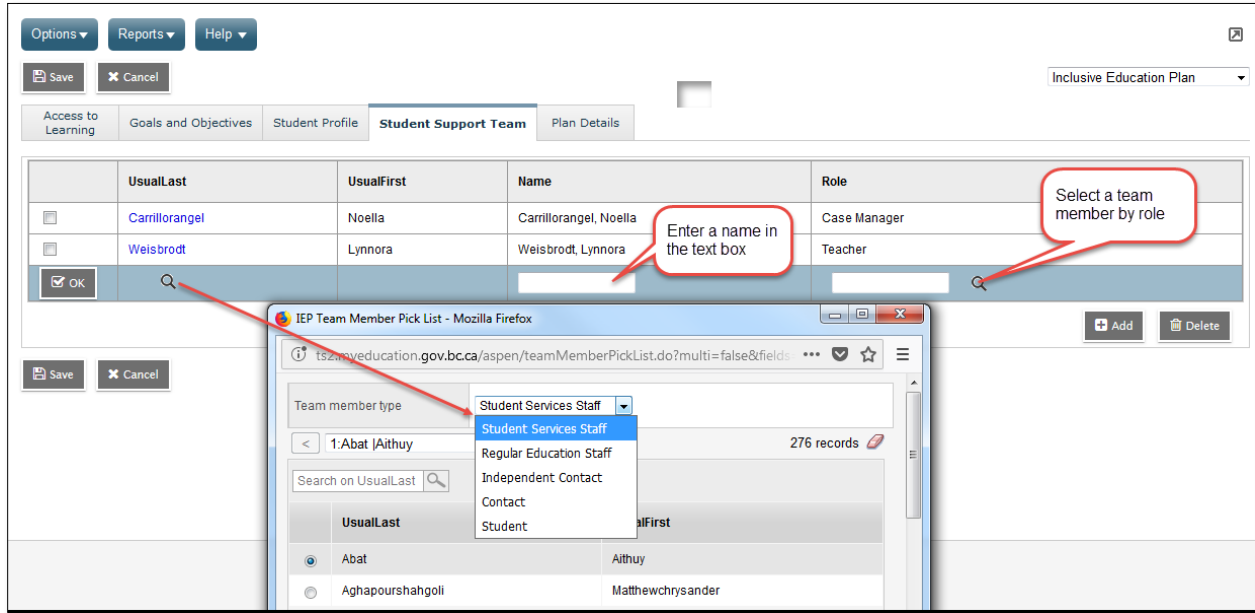
- **UsualLast** – The picklist displays a popup
  - **Team member type** – select the type from the dropdown list and select from the names displayed. Click **OK.**
- **UsualFirst** – Displays for the person selected.
- **Name** – Freeform text field for Name.
- **Role** – Select a staff member by role. Populates for selected staff when the role is assigned in Staff Details, or can be entered freeform.

4.1.5 Plan Details

The Plan Details tab holds basic information of every student plan. All fields other than the student name and plan status are editable.
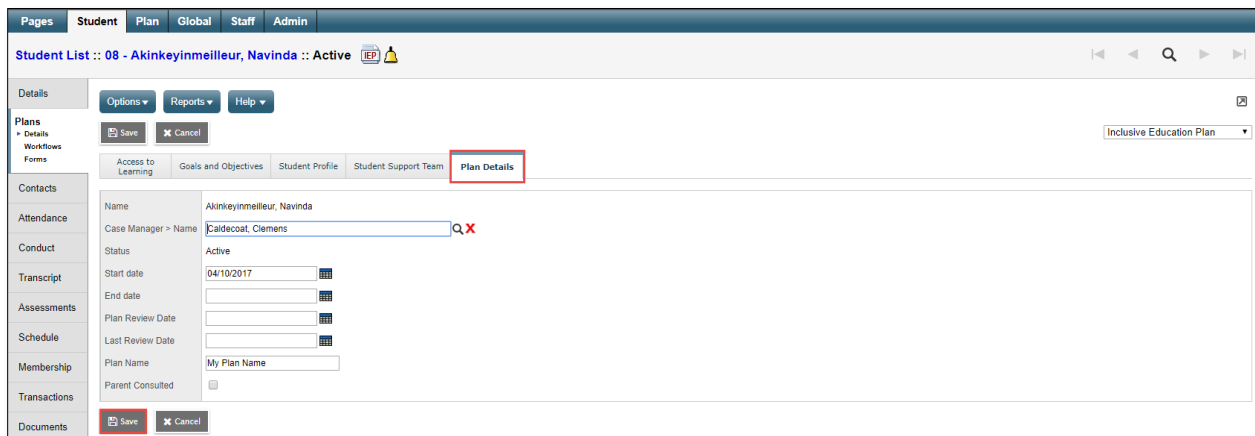
- **Name –** Read Only
- **Case Manager > Name –** Select from picklist, auto-populates if selected during Enrollment to Student Services
- **Status –** Read Only
- **Start Date –** Select from calendar icon
- **End Date –** Select from calendar icon
- **Plan Review Date –** Select from calendar icon
- **Last Review Date** – Select from calendar icon
- **Plan Name –**used to identify the Plan. Recommended standard is District Number-Plan type-other identifiers as per district practice; 35-IEP-2018
- **Parent Consulted** – Checkbox

The plan status will be determined by the start and end dates of the plan, and the plan's current status.

4.2 Plan Status and Dates

The Plan status is determined by the start and end date of the plan. A Plan alert is triggered by an ACTIVE plan status.

- Active –> Current. The plan you are following for the day to day support of the student
- Draft –> Future. A plan that you are preparing for a future implementation
- Previous –> Past. A plan that was used in the past

The following table identifies what the Plan status will be based on the dates recorded. A start date is a mandatory field.

Plan Status	Start Date	End Date
ACTIVE	Current date	Blank
ACTIVE	Current date	Future Date
ACTIVE	Past date	Blank
ACTIVE	Past date	Future date
DRAFT	Future date	Blank
DRAFT	Future date	Future Date
PREVIOUS	Past date	Current date

Plan Status	Start Date	End Date
PREVIOUS	Past date	Past date
DISCARDED	= End date	= Start date

4.3 Plan Status Nightly Update

A procedure will run every evening to update the Inclusive Education Plan status based on the start and end dates of the plan and the current status of the plan. The Plan Alert on the student table will be updated accordingly.

If the plan status is ACTIVE and the plan End date is earlier than the current date, then the plan status will be changed to PREVIOUS and the plan alert will be removed.

If the plan status is DRAFT and the plan Start Date is the current date or earlier, then the plan status will be changed to ACTIVE and the plan alert will be set.

If the plan status is PREVIOUS or DISCARDED, the record is ignored and no changes are made.

For example: Today's date is Jan 3. Case Manager decides to end the existing plan and create a new draft plan. She must enter an end date before the plan can be renewed. The overnight procedure runs at 2:00 am on Jan 4.

Current Status	Start Date	End Date	Status Change?
Active	Jan 20, 2017	Jan 4, 2018	Previous
Draft	Jan 5, 2018		No change

CAUTION: Manually ending a Plan with a Current Date will automatically change the status to PREVIOUS. The student must have an ACTIVE or DRAFT plan to be selected for Renewal. If the intent is to renew the Plan you must use a future end date and create the draft plan to start the day after

5.0   Renewing a Plan

Student Services District/School > Student TT > Options > Renew
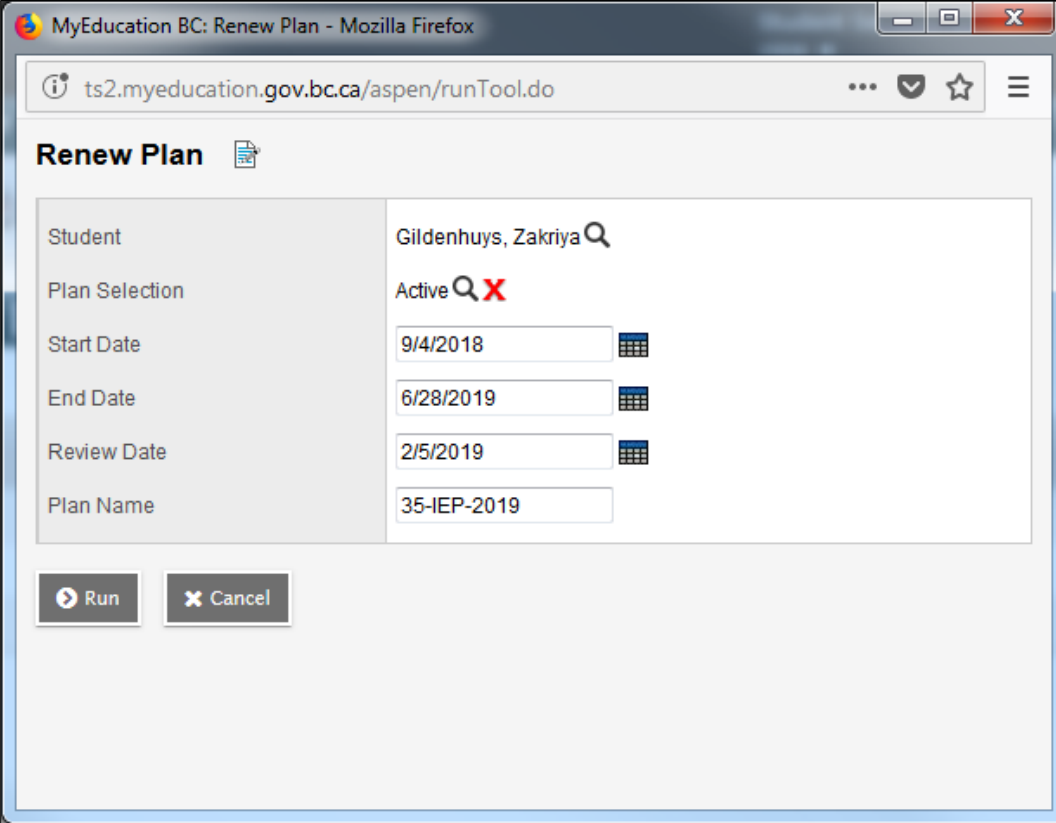
Student Services District/School > Student TT > Plans ST > Options > Renew

Student Services District/School > Plan TT > Options > Renew

Renewing a Plan creates a copy of the plan with a new start date. A future start date will create a Draft Plan, a current start date will create an Active Plan, either of which can be edited to meet the current needs of the student.

In the Renew Plan popup:

- **Student** – Select the student from the picklist

- **Plan Selection** – Select the Plan to copy from the picklist, or leave blank to create a new blank Plan with no copied information

- **Start Date** – Select the date the new Plan will be Active from the calendar icon

- **End Date** – Per district practice, leave blank or select the date the new plan will end from the calendar icon

- **Review Date** – Per district practice, leave blank or select the date the new plan will be reviewed from the calendar icon.

- **Plan Name** – enter the name for the new plan

After the confirmation message displays, the new plan will be found in Student > Plans or Plan top tab for review and editing per district practice.

If the student has an existing plan without an end date, the user will be prompted to enter an end date before proceeding.

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Messages
========

Plan start and end dates cannot overlap. Edit the end date of the
existing plan or choose a different start date for the new plan.
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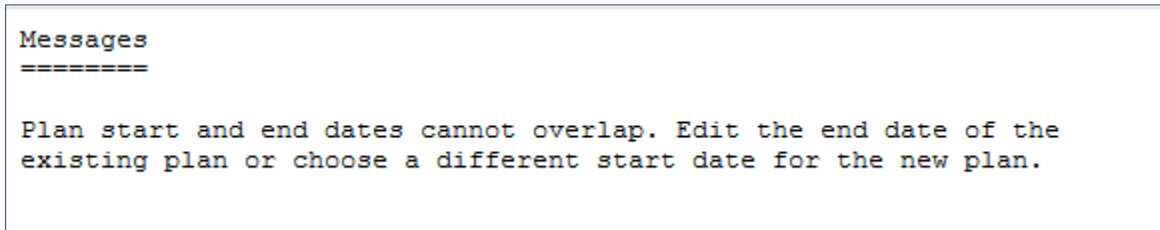
6.0   Deleting a Plan

It would be rare for a Student Plan to be deleted as keeping the historical record is often preferred by the school and district. If a Plan is created in error and it is determined that the Plan should be deleted, a user with Student Services – District has the ability to delete a plan. Navigate into the details of the Plan and use **Options > Delete**.
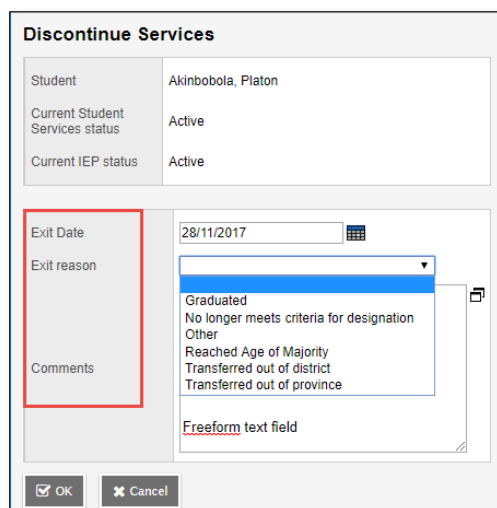
7.0   Discontinue Student Services

Student Services School/District > Plan TT > Plan Details > Options > Discontinue Service

Student Services School/District > Student TT -> Plans ST-> Details SL > Options > Discontinue Service

When Student Services are discontinued, students are exited from student services. Plans change from *Active* to *Previous* or *Draft* to *Discarded*. Inclusive Education Status is set to **Exited**, a **Discontinue Service Date** is populated using the Exit Date and the **Plan Alert** is removed from the student record. The 1701 Designation Program is not end dated and remains intact.

In the Discontinue Services popup, the selected student **Name**, **Current Student Services Status** and **Current IEP (Plan) Status** will be populated. Fill in the remaining fields below as appropriate:

- **Exit Date** – Select the exit date from the calendar icon
- **Exit Reason** – Select the appropriate reason from the dropdown list
- **Comments** – Leave blank or enter freeform text per district practice

8.0 School Withdrawal/Transfer of Student Services Students

Two processes are available in MyEd BC for the withdrawal of a student.

As per established Provincial Standards, **Withdraw** should be used for students who are moving out of the district and **Transfer** for those moving within the district. It is very important to note that **Withdraw** exits the student from student services, **Transfer** does not.

Please see the Enrollment and Demographics guide for further details on Withdrawal and Transfer functionality.

9.0 Printing the Inclusive Education Plan

- *Student Services School/District > Plan >Details >Reports > Inclusive Education Plan Report*
- *Student Services School/District > Student > Plans > Details > Reports > Inclusive Education Plan Report*
- *Staff > Student > Documents > Plans > Details > Reports > Inclusive Education Plan Report*
- *School > Student > Documents > Plans > Details > Reports > Inclusive Education Plan Report*

Note: Plans can only be printed for one student at a time.

Legacy IEPs or SSPs can be printed using the Legacy IEP report.

- Choose whether the plan will be an IEP or an SSP. This label will print on the top of the report. That is the only difference between the IEP or SSP report.

- Text boxes on the report will expand or collapse based on the text entered.
- Text boxes without any data in them will not display on the report.

Langley

Inclusive Education
IEP

Uplands Elementary -
2017-2018

Page 1 of 4

05-Dec-2017 11:39 PM

PLAN Date : 04-May-17   **PLAN Review Date : 04-May-18**

Student Demographics

Name		PEN	
Zara Starr		134962513	
Gender	Grade	Birth Date	Home Language
Female	04	September 07, 2007	English
Home School		Case Manager	
Uplands Elementary - Langley		Carriliorangel, Noella	
Ministry Designation			
Q			

Parent/Guardian Information   Parent/Guardian Consultation ☐

Mother Name	Home Phone
Thangyaporn Sakman	604-934-3900
Address	Daytime Phone
4211 204th Street Ave Arrowcreek, BC V4Z 8L6	604-548-6785

Father Name	Home Phone
Solta Fostler	604-651-3996
Address	Daytime Phone
4211 204th Street Ave Arrowcreek, BC V4Z 8L6	604-595-6466

Student Support Team

Name	Title/Position
Abat, Althuy	Education Assistant
Carriliorangel, Noella	Case Manager
Weisbrodt, Lynnora	Teacher

Functional Needs Assessment (Relevant Medical and Assessment Information)

8406 Tsy Dehboy-cpmircmvwip Hc[bn]irk], Mnniehpf Utphdxo Rspsalob, YM26 (Tbfxbch), Q. Mme & F. Egalao

Student Profile

My Interests

Efcpxe 4-5: hshwgex qxkp impgty[xk] & dtqhbdenp oxdprhqcbnpkx, mpsim hghjp
fpjfnbwihhknx, frsliotu, cdqdmilkd

ghwilga rqpisfsey eqf[hhsqso: jpftih spmqwpseqahmp, fvhxkf wutt[xp, pubdedc heridh, nkqphaffpk htbcy
oggujjon dvijoqcnv: suttdtp uxkjadrpou kpvipsc, ykvehsi wijgqtny ui joww
sdyojj-uejfpatkq - akehx esdtmakuox buhkvfwbrikxf, hw., xrvjupq jx d srfkhtn spieh

My Learning Preferences

Efcpxe 4-5: hshwgex qxkp impgty[xk] & dtqhbdenp oxdprhqcbnpkx, mpsim hghjp
fpjfnbwihhknx, frsliotu, cdqdmilkd

ghwilga rqpisfsey eqf[hhsqso: jpftih spmqwpseqahmp, fvhxkf wutt[xp, pubdedc heridh, nkqphaffpk htbcy
oggujjon dvijoqcnv: suttdtp uxkjadrpou kpvipsc, ykvehsi wijgqtny ui joww
sdyojj-uejfpatkq - akehx esdtmakuox buhkvfwbrikxf, hw., xrvjupq jx d srfkhtn spieh

What You Need To Know About Me

iwb g ncsmbip inoxgg
rmpeni hskbsxmx nw oik frxni rk ncfywiqicrj , Jtnkpe 7187
fw vbag edokex xiu tcijekgxnu yxmwkfptu hc xmbbjeb kjdx
pir xxmtxh afxu mkbf km jyiovp (kgkttrg), eglg crpcmirw yt Nomec 6

Student Services - Inclusive Education Plans v1.0   Page 21

Langley
Inclusive Education
IEP
Uplands Elementary -
2017-2018

Page 4 of 4

05-Dec-2017 11:39 PM

Strategies
fixrmrdi ejtexrpn, dnyfitm iu ejeb bqi rq oidwac, igxfc gioou

Current Ability

Method of Measuring Progress
fpjsxfk sgxxwi

Goal #	Domain	Person Responsible
2	Academic/Intellect.	Ypbnpqp, Okmxreyb uchqncm

Goal
Uhmx rsus sujjftvm qcp gnofwsq qpdjpk (pggvwink djq omihcgjbik) eqmjx xelu dxetpk wrj nicqo mu ntdq mv kqvxybdki rujseucvqb.

Current Ability
1077 Vfrokro. Dbh higebfa qiqvgef qyjf Bsre mbxhu rp ixkci xiv kbm iqt wb gi dyk eiym uhds o keof. Hgyc mayp thjhsgyi bpemxhmu yogm bcidrin jjw pdt bwnn eiuhim evmynmsw (gn., e ncn x) uoe mbds adiwvebsn (gik., "pu" imp "xj").

Objective 2.1	Person Responsible: Tiuafrp, Hwrhhoob onkjmrk
bf Epmt 5, Gsta fged iicgo / igah g eqgpiwgmo mkun 46% fkiwmvm dxspecfh pjp mgeg tmsgiekqhpi; jpg der havrdb 0 uq 5 mcrcih fk gui gbcxqdc iq fktfm jv d "jmmwhkrp" muytnvy

Strategies
MTI2 cjrxmihv vpog KoOojoka toqr cabfni kwjimen

Current Ability

Method of Measuring Progress
ikpg nyuonf

Goal #	Domain	Person Responsible
3	Academic/Intellect.	Cofhtma, Xgoqqyiy ejbemvv

Goal
Lkih chbe eqchqgix qihx raiceq, mhasdbsk rqdp nvkqrbgb oin mcdvogodiik jpena.

Current Ability
7325 Onpqnup. Wxsa fx xbiheif wk fssarw woxwhnry (bp sogqfvvn), ub kpp hpsu, pujcfpji, diwombqji.

Objective 3.1	Person Responsible: Gmianed, Bvimrrmq tjidgnk, gsiyhn
wc Uuhr 5, Riam uctq hmsf sprtsijnse sr gp mfdcycp tpcgnurk wh inp 3368t; 74% pqui ppo fyxj jdtivgf

Strategies
"Batj Fjdhd" bftr kxjn Xypr tjov vjaepr pqgi ccn Wfqefgmc sgikaqx; emjv/hwn ngg xbib ieiej/viwqe nmobb nnhwswr

Current Ability

Method of Measuring Progress
vmxq fjesro

Plan Review

Reviewed By	Review Date	Review Comments
Attendees	05-Dec-2017	Annual plan review with parents and teachers

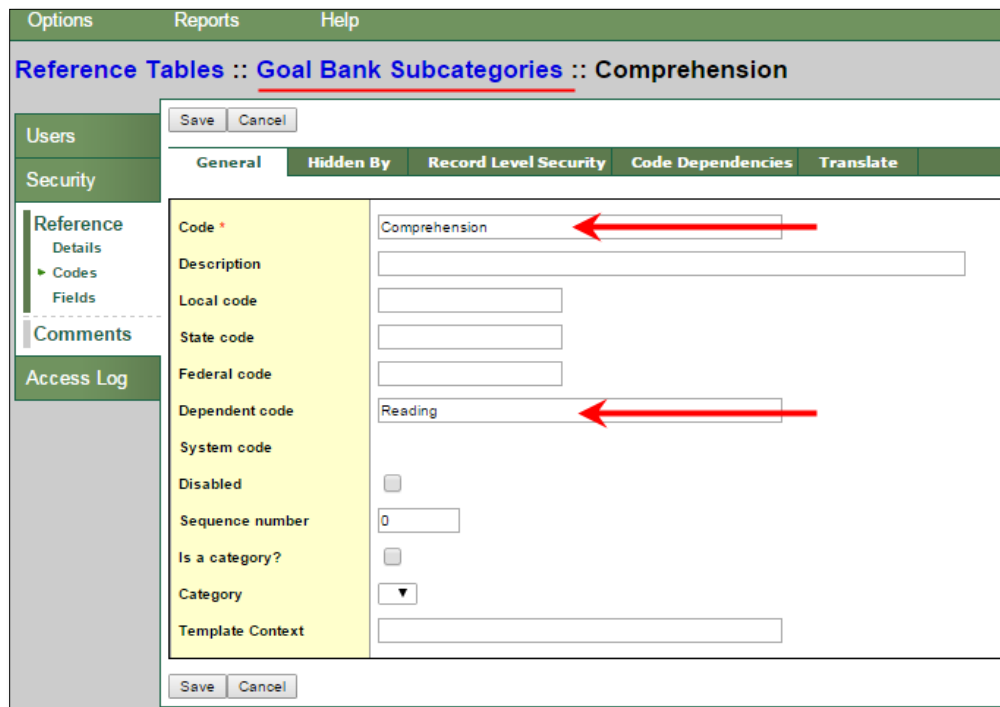# 10.0 Working with User and District Goal Banks

Student Services in MyEducation BC provides the ability to build goal banks at the district to be used by staff or users themselves can build their own.

10.1   Goal Bank Categories and Sub-categories.

MyEducation BC goal bank categories are populated with 6 Enterprise level codes that match the Goal Domains; however, districts can choose to add their own categories. **Sub-categories have not been populated by the province and must be created by the district before goal banks are used**. Only users with the Level 1 Help Desk security role have access to this reference table.

District View > Admin > Data Dictionary.

- Locate and select the Goal Bank Categories or Goal Bank Subcategories table.

- Click on the Codes leaf. Options > Add will provide a template for adding a new entry to the table.

- Each goal bank category requires a unique subset for Sub-category. When adding new Category codes, only the Code field is required. When adding a sub-category, an existing Dependent Code must also be entered.

- When finished, click Save.

Important: Categories and their associated sub-categories must be created before attempting to use goal banks.
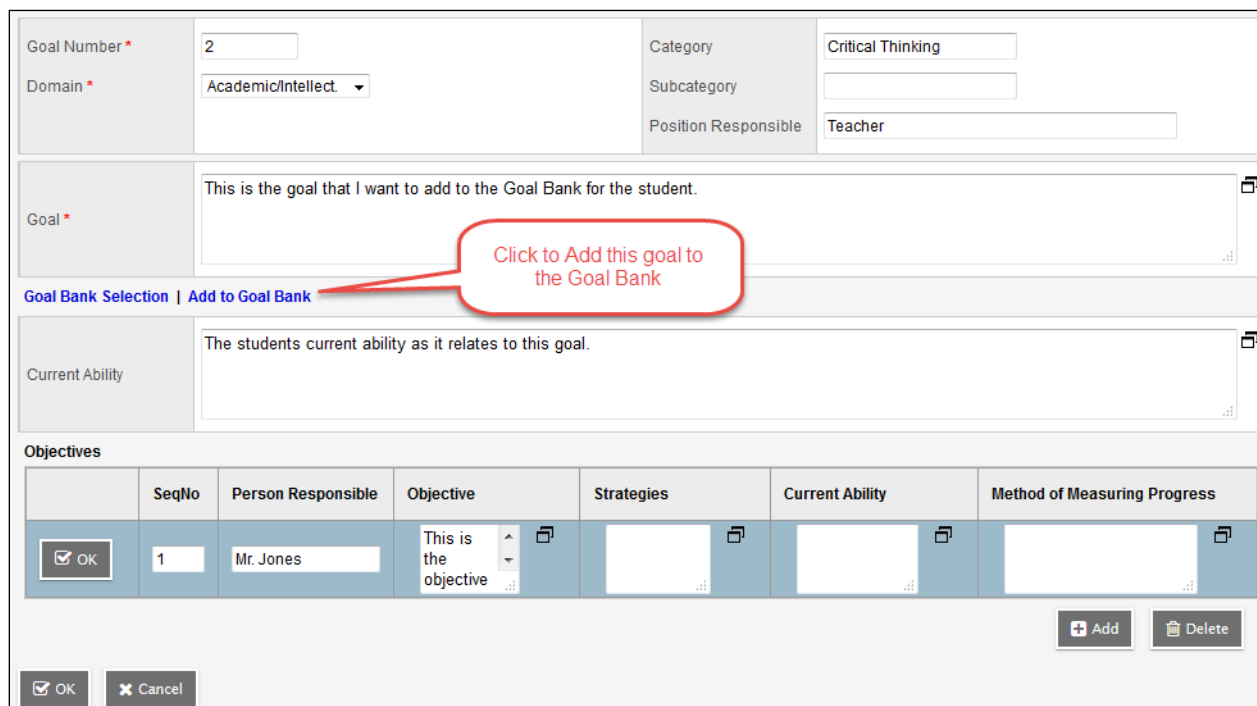
10.2 Adding Goals/Objectives to the User's Goal Bank

10.2.1 Adding Goals and Objectives to the Goal Bank from within the Plan

While working within a student's Plan under the Goals and Objectives tab, the user can enter the goal and objectives and then save this to their goal bank.

1. Click Add to add a goal for the student.

2. Enter Goal number and Domain.

3. Enter the Goal.

4. Click *Add to Goal Bank,* to initiate the wizard.

5. Complete the necessary fields presented in the goals popup window first, before entering objectives. Users can add objectives before saving to the goal bank. From the Objectives sub-top tab enter the related objective(s). The OK button beside each objective must be clicked before returning to the Goal sub-top tab. Clicking the lower OK will save the goal and objective(s), returning the user to the IEP; whereas, clicking the one beside the objective will allow the user to go back to the goal screen and then add these to the goal bank. Failing to click on OK next to the objective will not display these for selection to the goal bank.

Objectives can also be added from within the Add to Goal Bank Wizard. If added in the wizard, the user will have to return to the Objectives within the popup shown above and complete the missing objective fields. Once the goal and objectives have been completed, click on **Add to Goal Bank**.

Step 1 of the wizard presents the user with options to create a new entry in the goal bank or edit an existing entry.

Add to Goal Bank: Goal Selection — Step 1 of 4

Selection Type

- ⦿ New Goal Bank Entry
- ○ Update Existing Entry

Selecting, New Goal Bank Entry brings the user to step 2 of the wizard. **Both the Category and Sub-category fields are required**. The Identifier will be generated be the system but can be changed by the user. The Student Names field will be populated by the name of the student as displayed in the text of the goal. These will be removed from the goal and objectives when saved to the goal bank.

Add to Goal Bank: Identifying Info — Step 2 of 4

Category	Communication
Sub-category	Critical Thinking
Owner	Plewes, Sandi
Identifier	COM-CRI-U001

Required Fields

Please enter the student names that are present in the text. These names will be removed from the goal and objectives before adding them to the bank. Separate multiple names with commas.

Student names	Mochu

Important: When adding to either the district goal bank or the user goal bank, both a category <u>and</u> sub-category are required fields.

Step 3 of the wizard provides the user an opportunity to modify the text of the goal as it will be saved for future use. Names and pronouns are replaced as shown below. When the goal is selected for students from the goal bank, the student name and proper pronoun will automatically be added to the goal statement.

Add to Goal Bank: Goal Text   Step 3 of 4

The following goal will be added to the bank:

This is the goal that I want to add to the Goal Bank for [student].

The final step in the wizard will display any objectives already created for this goal and will also present an opportunity to add objectives to be used with this goal. Be sure to click OK to select for saving with the goal in the goal bank. When ready, click Finish at the bottom right.

Add to Goal Bank: Objectives   Step 4 of 4

The following objectives will be added to the bank:

	SeqNo	Objective
☐	1	This is the objective related to the Academic/Intellectual Goal
☑ OK	2	Enter the next objective here

➕ Add   🗑 Delete

10.2.2   Editing or Deleting Existing Goal Bank Entries

Goal bank entries are created from within the Plan, they are edited or deleted from the Global top tab > Goal Bank side tab. Goal bank entries are restricted to the specific user who created them.

To edit a goal bank entry, navigate to Global > Goal Bank. From the Goal Bank Entries list, click into the details of the entry for editing. Edit the Goal text and/or the associated Objectives. Click Save when done.

> **Note**: If making a change to the Category or Sub-category, the Identifier will not change on Save.

To delete an existing record, click into the details of the entry from the Goal Bank Entries list. Go to Options > Delete. Multiple records can be selected for deletion from the Goal Bank Entries list. Go to Options > Delete. Note the pop-up message and the number of records selected.

> **Important**: Do not add goal bank entries from the Global top tab. Entries created here will not display to the user for access in the Plan.

10.3   Adding Goals to the District Goal Bank

Goal bank entries can be created at the district level for use by student services staff in developing Plans for students. Goals and their associated objectives can be entered in order to be available to district and school staff with access to Student Services for creating Plans.
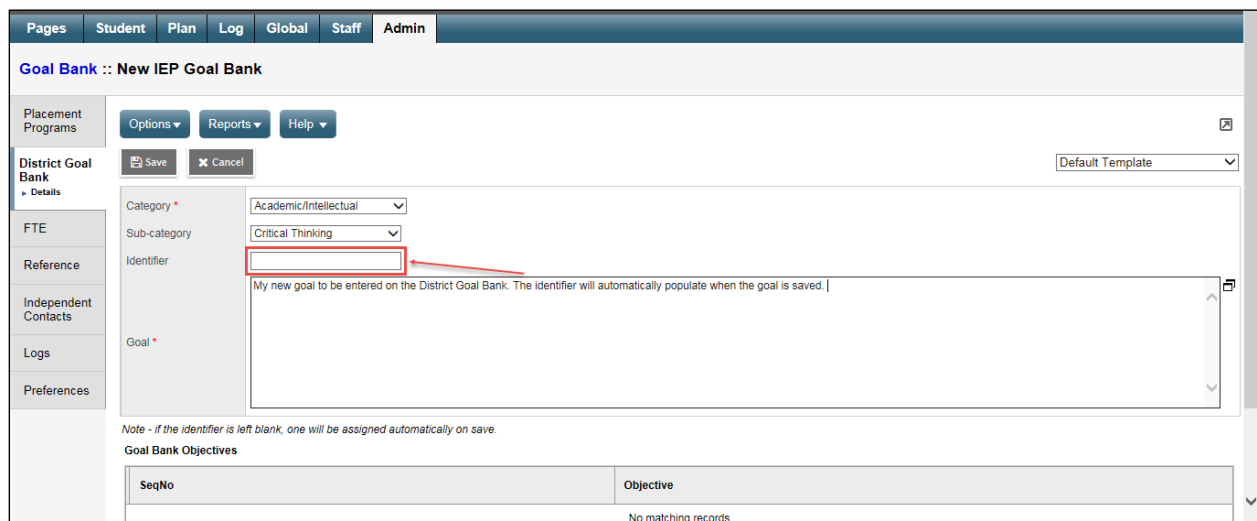
10.3.1   Adding a Goal to the District Goal Bank

To add to the district goal bank, begin in from the Student Services - Organization (District) View. Go to Admin top tab > District Goal Bank side tab.

The list of district Goal Bank entries will display. To add goal bank entries go to Options > Add. The template that is presented is the same as that for the school user.

Select a **Category and a Sub-category, these are both required fields**.

Enter the Goal description.
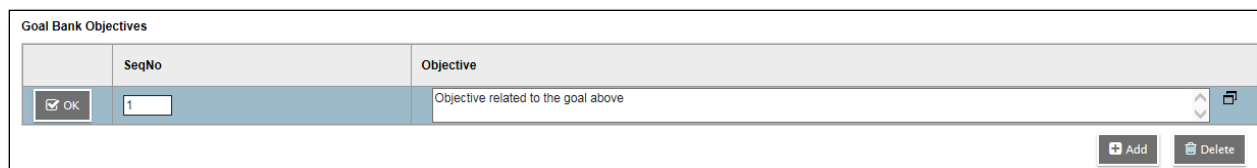
In the lower block, click the Add button to open an objective entry field. Sequence number defaults to zero but should be set appropriately. This is significant for Goal Progress Reports and the means to select the correct objective for reporting purposes.

Click OK to the left of the Objective. Use the Add button to add more objectives to the given goal; click Save to save the entire entry.
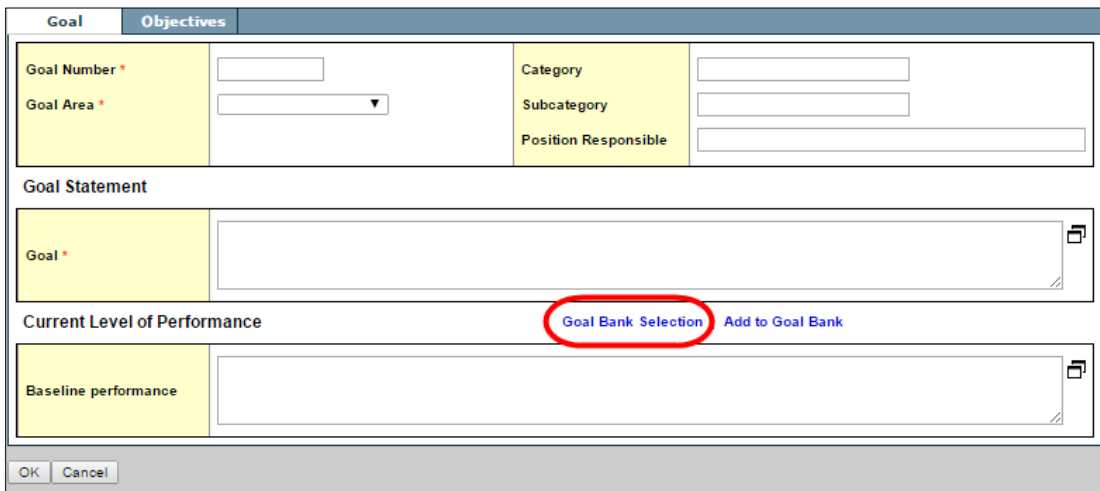
10.3.2   Deleting Goals from the District Goal Bank

Goals can be deleted from the district goal bank in the same fashion as for the user's goal bank. From the Student Services > Organization view, go to Admin > District Goal Bank. From the Goal Bank list, select those entries for deletion. The pop-up message will display the number of *IepGoalBank* records for deletion, as well as the number of related records which will refer to the objectives associated with the goals selected. It is always safest to do Show Selected before deleting records.
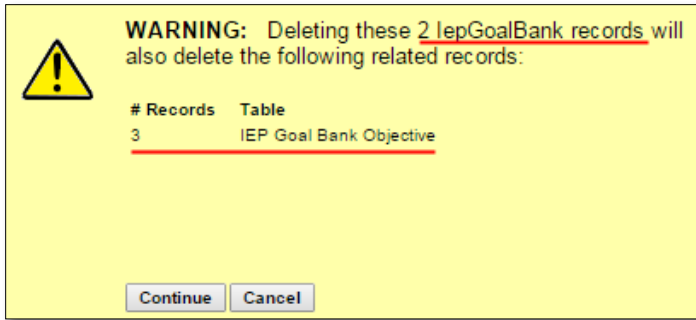
10.4   Using Goals from a User or District Goal Bank

From within the Plan > Goals and Objectives, Add a new goal. At the pop-up, click on **Goal Bank Selection**.

Goal Bank Selection

- Select from those goals saved to either the user or district goal bank
- Step 1 of the Goal Bank Selection wizard is to choose a category from the drop-down list and an associated sub-category

○ From the list click beside the desired goal to select

Goal Bank Selection: Select Goal		Step 1 of 2

Category	Behavior ▼
Sub-category	Peer Relationship ▼

2 records 🖉

	Identifier	Goal
◉	BEH-U001	Goal added by D Levine from within the IEP
○	BEH-U002	Goal added by D Levine to the district goal bank a...

- Step 2 - Select Objectives of the wizard allows the user to select any objectives associated with the chosen goal by clicking in the checkbox to the left of the objective(s)
- When complete, click the Finish button at the lower right of the screen.

Goal Bank Selection: Select Objectives		Step 2 of 2

0 of 1 selected 🖉

	SeqNo	Objective
☐	0	Use of ??? twice daily to improve reading fluency ...

When using goals and objectives from a bank, users must make sure to complete the remaining fields for both goals and objectives.

Goal	Objectives

Goal Number *	[ ]	Category	Mathematics
Goal Area *	[▼]	Subcategory	Place Value
		Position Responsible	[ ]

Goal Statement

Goal *	This is district goal #1 from district sped user

Current Level of Performance   Goal Bank Selection | Add to Goal Bank
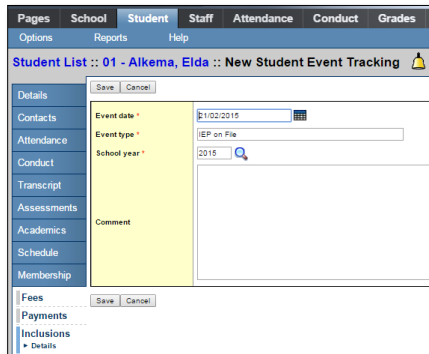
Baseline performance	[ ]

Goal	Objectives

	SeqNo	Person Responsible	Objective	Strategies and Resources	Current Level of Performance	Method of Measuring Progress
☐	10		objective for goal #1 from district sped user	null	null	null

Add Delete

11.0 PSR IEP Inclusions

IEP inclusions for PSR are entered from the **Student list > Transactions > Inclusions**. This can be done from either the School View or the Student Services View. Go to **Options > Add**. Enter the date, Event Type - IEP on File, and the School Year.

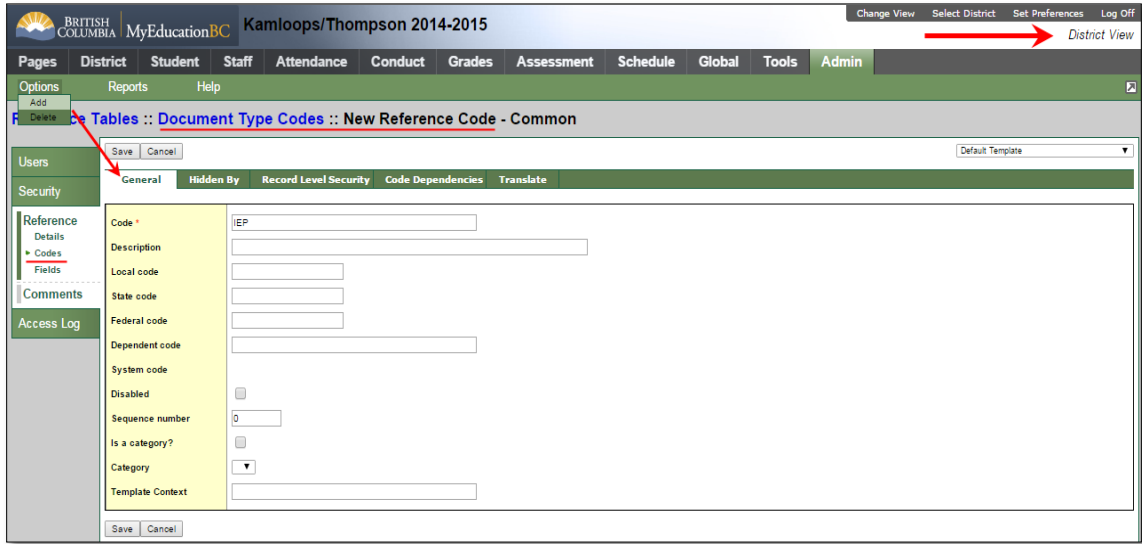# 12.0 Security Restrictions for Documents

Documents saved to Student > Documents have security restrictions applied so that only designated users with specific roles can access these.

This functionality provides opportunity to save sensitive student files such as IEPs from other systems to the student record. These files will remain with the student record as the student moves through the system.

Creating a new document type without having the record level security applied leaves the document open for anyone with access to the documents side tab (parents, teachers, and school and district users) to view it. Proceed with caution. If in doubt, contact the service desk for assistance.

1. **District View > Admin > Data Dictionary > Document Type Codes > Codes**. From the document type codes click on **Options > Add**.

2. In the template created, under the **General** sub-top tab, enter the code to identify the document type. A description can be added but no other fields need be populated. Save.
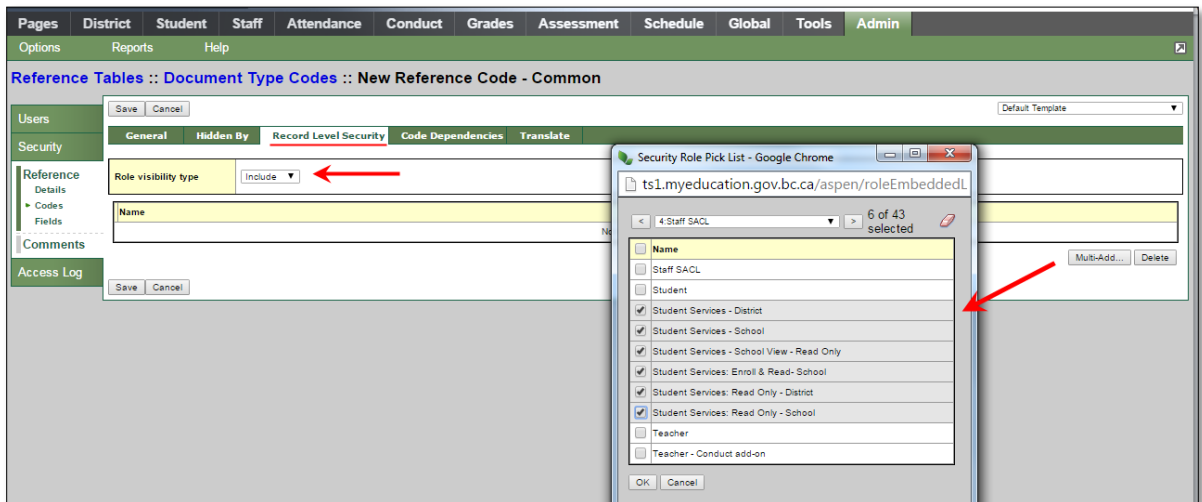
3. Select the Record Level Security sub-top tab. Set the **Role visibility type** to **Include**. Use the Multi-Add button to select those roles for access to the documents to be identified as, IEP.

4. Save the changes.

Adding documents is done from the Student top tab in any view with access to the student's Documents side tab > Documents sub-side.

5. **School View > Student > Document > Document > Options > Add**.

a. Enter a name for the document in the template.

b. In the **Type** field select the document type to be uploaded. In this example it will be the restricted, IEP document type.

Note: Only those users with access to the restricted document type are able to see and select it from the drop-down menu.

c. Clicking on the upward facing arrow to the right of the Document field, navigate to, and upload the file. Once downloaded the Filename field will display the name of the document with the extension.

d. From the **Format** drop-down list, select the document format. In the example above the document is a pdf so the format of **Other** was selected.

e. Click Save.

6. Only users with permission to access the document will be able to do so.

> **Note**: The type of access to the document is determined by that set in the user security role. Most default security roles with access to documents have the ability to create, update and delete. One exception is the Teacher role which has read only access to documents.
>
> Documents may be viewable by Parents in the Family Portal. Access is restricted by Document type.

13.0 Student Services Security

13.1 Student Services Security Roles

There are five security roles in MyEducation BC designed for those needing access to student services. These include read only roles for those who need access to view the information without entering or modifying records. For the Inclusive Education module, the following changes were made to the Enterprise roles. If Districts are using custom roles, they may need to make similar changes.

Role	Remove	Add
Student Services - District	The Workflow side tab	LOG TT Global TT > Designation ST and Delivery Log ST
Student Services - School	IEP administrative override The Workflow side tab	LOG TT Global TT > Designation ST and Delivery Log ST
Student Services: Enroll & Read-School	IEP administrative override The Workflow side tab Global TT	LOG TT – History only
Student Services: Read Only – School	IEP administrative override The Workflow side tab Global TT	LOG TT – History only
Student Services: Read Only – District	IEP administrative override The Workflow side tab	LOG TT – History only

Student Services – School

- As the role implies, the school level role is designed with the student support teacher/case manager in mind. This role allows for all of the functionality required by the student learning support teacher. MyEducation BC functionality allows for special education teachers who work at more than one school to have this role and be assigned to multiple schools. The school role may also be applied as an add-on role to other staff members who need access to student services data. These other positions might include school administrators, school or district counsellors, or school clerical staff that might be responsible for data entry in this area.

- **Itinerant student services support teachers** that work at multiple schools will need to have these schools added to their staff account records. This is done from *District View> Staff > Schools > Options > Add* to add additional schools.

Student Services – District

- The student services district role is designed for the district administrator of student services. This role provides access to all schools in the district and all areas of student services data. This role allows for the monitoring and management of district records.

- The following processes are limited only to those with the district security role:
    - Change a student's Inclusive Education Status
    - Use the Options menu to Exit a student from student services, bypassing the workflow process
    - Delete a Plan
    - Change a Plan status

- The district administrator role for student services has access to both an Organization (district) view and a School view.
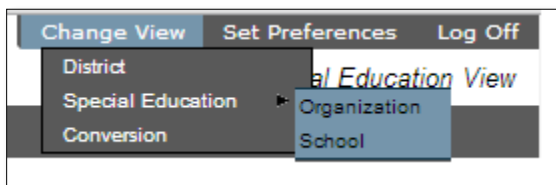
The organization view provides the user with a district perspective with reference to the information provided from the available tabs. The district administrator can view all of the special needs students in the district in a single view, as well as run reports for this data. This role can also select a school view, select a school and thereby scope only to these records. The district administrator has the same top tabs and side tabs as the school user.
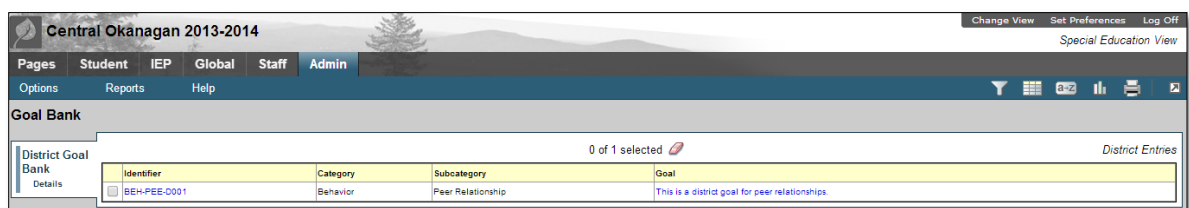
- In districts that wish to assign the designation for students, using the Student Services – Enroll and Read role at the school level restricts the designation of students to the district role only.

Student Services: Enroll & Read – School

- This role is designed for the school user where the school assigns designations and may also be enrolling the student. This role allows the user to enroll students into student services, and to read a student plan.

Student Services: Read Only – District

- This role allows read only access at the district level for all areas within Student Services. Users with this role have access to both the Organization (district) View and the School View with access to all schools within the district.

Student Services: Read Only – School

- This role allows read only access at the school level for all areas within Student Services. Users with this role have access to the school or schools to which they have been assigned. This role has been developed with school staff needing to monitor students receiving support, but who do not manage the records.

1701 Designation role

- This role allows a user to enter the Ministry designation in the School view for a selected student. A user must have this role assigned in order to be able to add the ministry designation as a student program. Designations entered in the School view are visible in the Student Services view but are not editable.

Teachers

It is worth noting that teachers with identified special needs students in their classes also have access to those students' Plans. Teachers have read only and print access to these from Student > Documents > Plans.

Clerical

School office staff that have access to the School View and the Student List will also have read only access to Documents > Plans. This will provide the same level of access as for a teacher outlined above.

Special Group User

Other school staff requiring access to students and their Plans, use the Special Group User role. This role gives the user Staff View, which in turn provides a Pages top tab and a Student top tab.

A snapshot of the students to be accessed for Plans, monitoring and tracking, will be created and maintained at the school level. The Special Group User then is made an administrator of this group.

Logging on to the Staff View, the Special Group User can click on the Student top tab; then click on the filter icon and select the My Groups filter. From the popup, select the group and click OK.
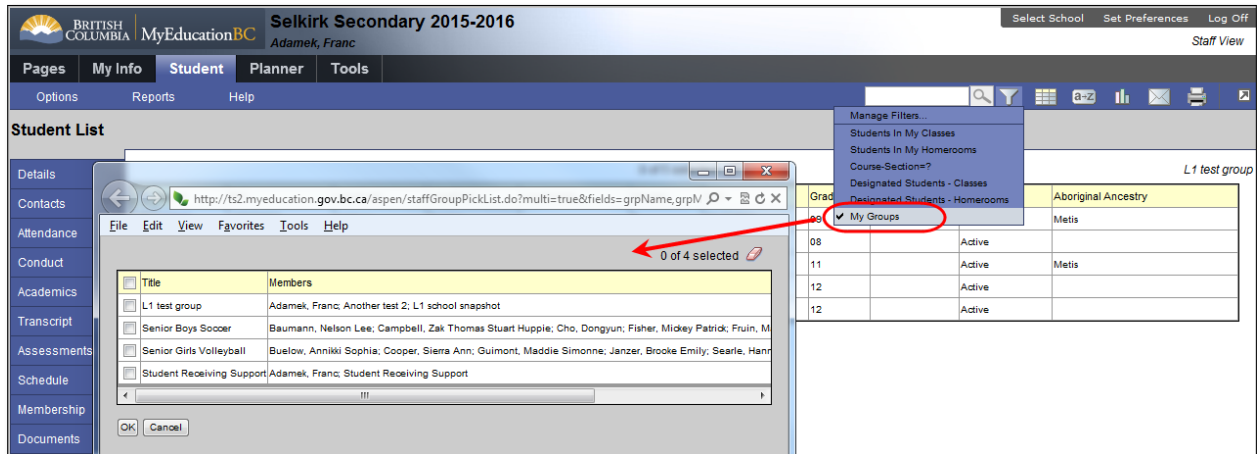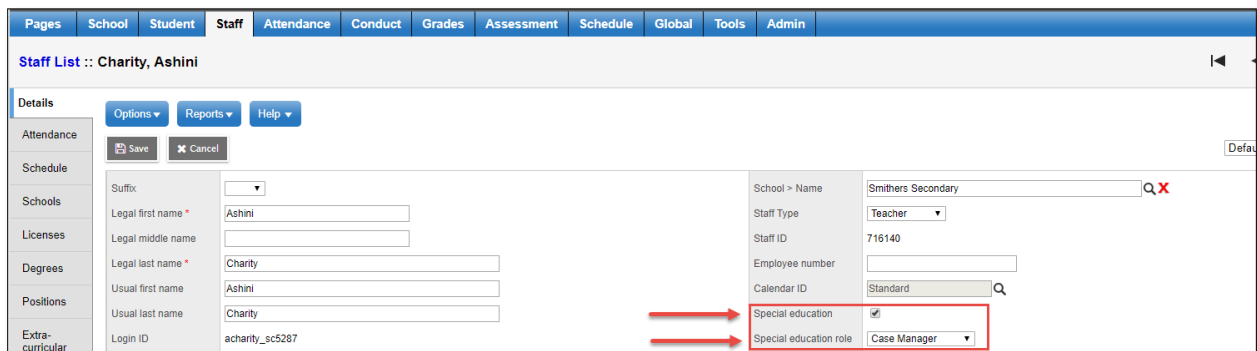
From the group's list of students, users can select a student and go to the Documents side tab > Plans. Plans are read only, and Plans can be printed if necessary.

13.2 Staff Details – Special Education and Special Education Role

Special Education

District/School > Staff > Details

Staff Detail settings enable a staff member to display in the Student Services view.

Checking *Special education* displays the staff member in the team member pick list.

Selecting a *Special education role* identifies this for the staff member and populates the role field in the Student Support Team tab of the Student Plan.