



Renewing Inclusive Education Plans for New School Year

In the *Student Services View*,

1. Click the **Student Top Tab**, *Filter*: All Records.
2. Click next to the student's name, **Plans Side Tab**, use the field set: *Default*

PlanName	Status	StartDate	EndDate
73-IEP-2018-V1	Previous	02/10/2017	31/08/2018
	Previous	31/10/2016	30/06/2017
	Previous	01/10/2016	30/06/2017
	Previous	01/10/2015	01/10/2016

3. Find the last Inclusive Education Plan (IEP) from the previous school year. Take note of the **EndDate**

Only DO STEP 4 IF THE END DATE IS NOT 30/09/2XXX

4. Select the PLAN

PlanName	Status	StartDate	EndDate
73-IEP-2018-V1	Previous	02/10/2017	31/08/2018
	Previous	31/10/2016	30/06/2017
	Previous	01/10/2016	30/06/2017
	Previous	01/10/2015	01/10/2016

Change the end date to 30/09/2XXX and save

1. Change to 30/09/2XXX

2. Save

Click the **Plans Side Tab**



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- 5. Click **Options, Renew Plan** (All Students)
 - a. Click the magnifying glass and select student name from the list
 - b. Select the PLAN to copy forward (you can copy ANY previous Inclusive Education Plan)
 - i. If no plan is selected, a blank plan will be created.

Renew Plan

Student	Select Student
Plan Selection	Active Select Plan
Start Date	01/10/2018 Enter 01/10/2XXX
End Date	30/09/2019 Enter 30/09/2XXX
Review Date	01/10/2018 Enter same date as Start
Plan Name	73-IEP-2019-V1 Enter 73-IEP-2XXX-V1

Click Run

When run, this message will appear:

Messages
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A new plan is created for the student

- 6. Click the **Plans** side tab, and the new version of the Inclusive Education Plan will appear.

Plans Details Forms	0 of 8 selected					
	<input type="checkbox"/>	PlanName	Status	StartDate	EndDate	Plan review date
	<input type="checkbox"/>	73-IEP-2019-V1	Draft	01/10/2018	30/09/2019	01/10/2018
Contacts	<input type="checkbox"/>	73-IEP-2018-V1	Active	02/10/2017	30/09/2018	
Attendance						

- 7. Select the new plan. Click on the Plan Details sub-Top Tab

Details Plans Details Forms Contacts Attendance Conduct Academics Transcript Assessments Schedule Membership	Options Reports Help
	Save Cancel
	Access to Learning Goals and Objectives Student Profile Student Support Team Plan Details
	Name: _____
	Case Manager > Name: _____ 1. Click the magnifying glass to assign the NEW case manager
	Status: Draft
	Start date: 01/10/2018
	End date: 30/09/2019
	Plan review date: 01/10/2018
	Plan Name: 73-IEP-2019-V1
Parent Consulted: <input type="checkbox"/>	
Save Cancel	

2. Save