SEIS

Admin Level Training

SEIS

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SEIS Network July 2022

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

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CODESTACK

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

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

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

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Web-based Data Entry System

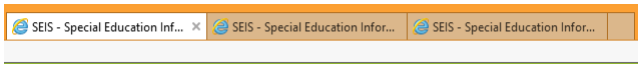
When working with any web-based data entry system, it is important that users utilize the features within the system to navigate.

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

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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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CALPADS Reporting

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CALPADS Reporting

Special Education data is reported to CALPADS.

IEP 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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At the District Level

CALPADS reporting is submitted at the district level.

A district level user should be appointed to review the CALPADS transactions, submit reports and ensure that errors are posted to the homepage.

The district SPED user will work directly with the SIS/CALPADS staff to verify and resolve CALPADS errors, as the SPED data is validated against the students SIS Enrollment Record.

Even though reporting is done at the district level, the SELPA will still certify the data.

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Students Enrolled in the District

Do you have a SEIS record for all SPED students currently enrolled in the District/SIS?

Do you have a SPED transaction for any student that enrolled and has transferred out?

The most common reason for the CERT132 error is the district not knowing that a student enrolled in the district IS a student with disabilities. If the student has already transferred, there is not a way to request their SEIS record to create a SPED transaction.

An **SSID Extract** should be generated from the SIS to verify that all students with disabilities (SWD) have a SEIS record in the district.

It is best practice to upload the Enrollment date for all students at the beginning of the school year. This should also be done prior to Census day and End of Year, to ensure the most updated Enrollment date is in SEIS.

The enrollment date can be updated through a Bulk Upload (*Permission needed: Bulk Upload Enrollment Dates)* or through our nightly Integration service.

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Students Not Found in District

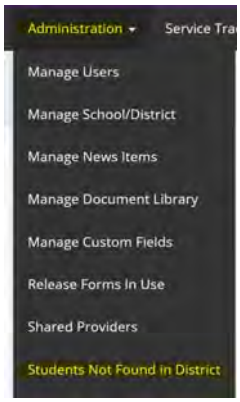
This report will allow the district to import the SSID extract that was generated from the SIS to see the students who are enrolled in the district and are flagged as a Student with Disabilities (SWD) but do not have a SEIS record in the district.

The file must ONLY contain SPED students (SWD = Y)

If a match is not found based on the information in the file, the student(s) will be placed in the Exception report. Review the students in the Exception report to verify if the SEIS record needs to be added/transferred or if the student should have been exited from SPED.

For District level users only

Permission needed: Can upload Students Not Found in District



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Private School Enrollment

How should I report a student who is enrolled in a private school, but is on an IEP as part of a settlement agreement?

Students attending a private school, who are on an IEP as part of a settlement agreement should be reported in the SIS at the **district level**.

This means LEAs should submit the Student Enrollment (SENR) file, with the **Reporting LEA** and **School of Attendance** fields populated with the **seven-digit county-district code**, and the **Enrollment Status** field populated with code **10 – Primary**.

These students should **not** be enrolled in SIS/CALPADS in a private school (0000002).

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SEIS Integration

It is important that the data in SEIS is aligned with the data in the SIS.

To alleviate duplicate entry and possible data entry error, SEIS Integration is an automated nightly import of data from your SIS into SEIS and/or from SEIS into your SIS.

Any field from the Student Record can be included in the nightly integration.

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What is a Transaction and how is it created?

A transaction is created when:

- When an IEP is affirmed (Initial, Plan Review or Eligibility Evaluation)
- When a student is Exited
- 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.

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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
- Parental Consent

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User Levels

SELPA Level User

- A SELPA level user can have access to all districts in the SELPA, or just a select few
- SELPA level users can view Exited, Transferred and DNQ'd students (Plan Type 700/800/900)
- Has ability to Add/Edit schools, generate SELPA wide reports, upload to the Document Library to store SELPA specific documents and to create SELPA wide Goal banks.

District Level User

- A District level user only has access to the students in their district.
- District level users can view Exited, Transferred and DNQ'd students (Plan Type 700/800/900)
- Has ability to Add/Edit schools, create News Items, upload to the Document Library and bulk upload student SSIDs/District IDs/Enrollment dates from the SIS.
- If a District level user also provides services, a Teacher level account will need to be created as well.

School Site Level User

- School Site level users only have access to the students in schools they are assigned to.
- Site level users can be shared with any school in the district.
- School Site level users can view Exited, Transferred and Plan Type 700/800/900 students
- If a Site level user also provides services, a Teacher level account will need to be created as well.

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User Levels

Provider Level User

- Teacher level users only have access to the students they are assigned to.
- Teacher 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/Attest within the recommended timeline.

Case Managers

- Communicate with the IEP Team so they are aware of timelines for the IEP.
- Case Manger is responsible for Affirming 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 their Caseload.
- To change a student's Eligibility status
- To Exit or transfer a student
- To notify the district of address change
- To create IEP transactions

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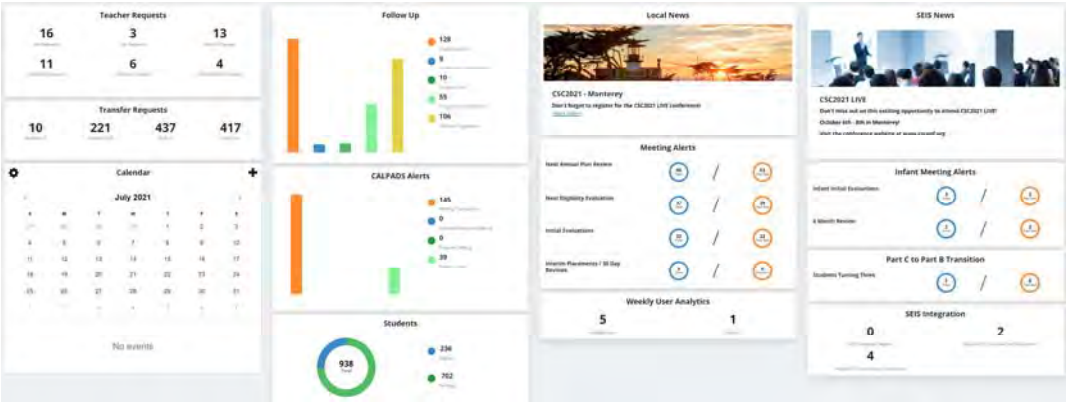
The Homepage



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Teacher Requests

When a Provider level user submits an Add Student form or a Student Change form, the notification will be listed in the Teacher Requests section.

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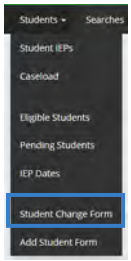
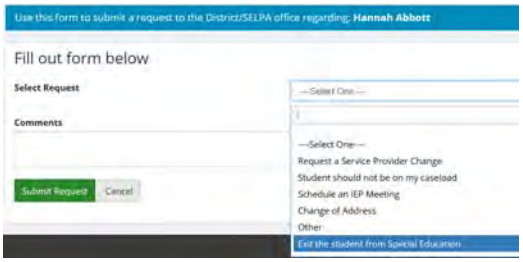
Student Change Form – Student Updates

Providers do not have the ability to manage the Student Record in SEIS.
Example: Assigning Providers, Change Eligibility Status, Exit or Transfer.

Providers utilize the Student Change Form to request these changes be made.





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Eligibility Status Update

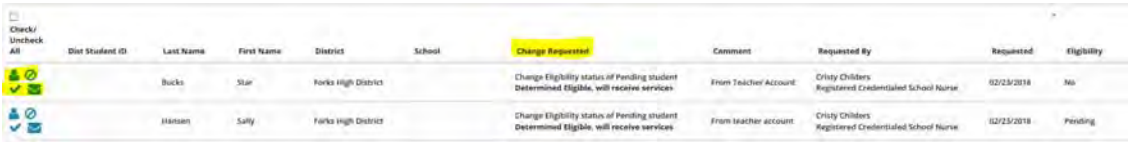
After the Initial Eval is held, the student's status should be changed immediately.

To process a request, click the Student Record icon

To decline a request, click the Decline icon

Once the add has been completed, click the Completed icon

To email the provider, click the Email icon



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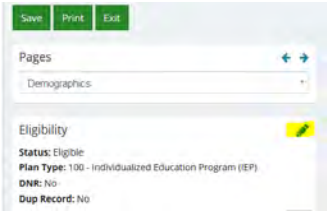
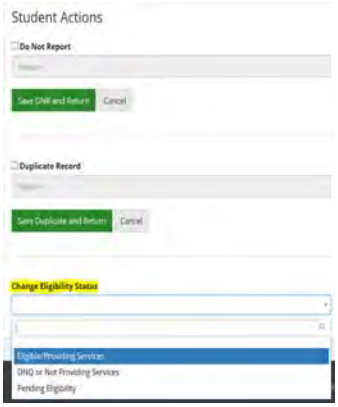
Updating Eligibility

Click the **Edit** icon in the Eligibility section.

Select the student's Eligibility from the **Change Eligibility Status** drop down.

All CALPADS errors must be cleared before the student can be DNQ'd





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Initial Evals

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.
- If the student's Pending transaction was submitted and accepted by CALPADS, it must be deleted.
- The student record would be marked Do Not Report and status would be changed to DNQ/Not Providing Services.

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.
- If the student is moving out of state, the pending transaction must be deleted from CALPADS, if it was submitted and accepted.

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.

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Initial Evals

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 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.

An Initial and the student did not qualify or did not agree with the outcome. The parent wants additional testing. What do we do?

- If the student is still in a Pending status:
  - This would be a continuation of the Initial.
  - The IEP would remain open as the assessments are not completed and agreed upon.
  - The IEP Date would NOT be updated. The second meeting date would be documented in the Notes.
- If the student was already marked Plan Type 800 or 900 and DNQ'd:
  - The record would be reactivated.
  - Meeting Type would remain Initial
  - Meeting Date would be updated to the date the new meeting was held
  - Select Meeting Delay code 10-Parent Refused to Consent

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Private School Enrollment – CERT145

How should I report a Gen Ed student who is enrolled in a private school that was referred to Special Education? See Flash #207

Gen Ed students attending a private school that are referred to special education should **not** be enrolled in the SIS in a private school (0000002) **until the ISP is agreed upon**. The student should be **enrolled at the district level**.

This means LEAs should submit the Student Enrollment (SENR) file, with the **Reporting LEA** and **School of Attendance** fields populated with the **seven-digit county-district code**, and the **Enrollment Status** field populated with code **10 – Primary**.

If the ISP agreed upon, the students Plan Type will be updated to 200 and the student's school can be updated to the Private school.

Submit an enrollment with:

- School of Attendance = the school or county-district (district-level entity) that the student will be attending
- Enrollment Status: 10 – *Primary*
- Grade Level: *Kindergarten – Grade 12*
- Enrollment Start Date: Parent Consent Date

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Assessed at EOY - Start in Fall

The date when the student first entered Special Education is defined as the date when the Individualized Education Program (IEP) Team determined the student eligible for special education services and parental acceptance of the plan.

If a student is assessed at the end of the school year, but will not start services until the Fall, the student's Special Education Initial Entry Start Date should be the date the IEP/ISP/IFSP was accepted and the student's Eligibility status should be changed to Eligible.

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Exit Requests

Exit Date and Exit Reason was entered by the provider.

To process the Exit request, click the **Student Record** Icon.

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Exits

All CALPADS errors must be corrected before the student can be Exited.

A validation will also run to ensure the student has an IEP transaction in the district, if the student has an unaffirmed IEP or Amendment or if there is an e-signature in process.

When the exit is processed, the Exit Date and Exit Reason will be inserted into the student's last reportable SPED transaction (IEP or Amendment).

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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.

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What to do with No Shows?

If a student is no show, it must be investigated to determine if the student will return or not.

If it is determined that the student will not attend school in your district **and the SEIS record is in your district:**

- Student would be exited in SEIS with the Exit date as the first day of school
- Exit Reason = 76
- Student is exited from the SIS as a No Show (E470)
- Since the SIS exit is a No Show, there is no expectation of a SPED transaction to be submitted

If it is determined that the student will not attend school in your district **and the SEIS record is NOT in your district:**

- **Do not request the SEIS record**
- Student is exited from the SIS as a No Show (E470)
- Since the SIS exit is a No Show, there is no expectation of a SPED transaction to be submitted

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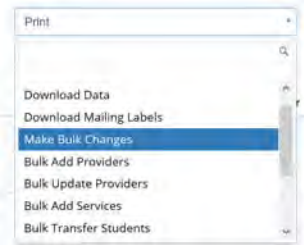
Students Exiting at EOY

Any student that will not be returning the next school year **must be exited PRIOR to 6/30.**

Do not wait until after 7/1 to exit your Seniors or students that will not return the next year.

Exit Date and Exit Reason can be Bulk Updated.

Students will have to be individually exited, to ensure the student record is error free



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Attending ESY

When do you Exit students that will not return the next year, but will attend ESY?

For SPED - Students should be exited on the day they stop receiving services. Therefore, the student would be exited at the end of ESY.

For the SIS – Students can be exited on the last day of school.

For students that are exited from SPED from **June - August**, the SIS Exit date and the SPED Exit date do not need to match.

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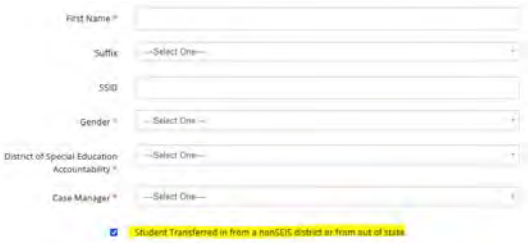
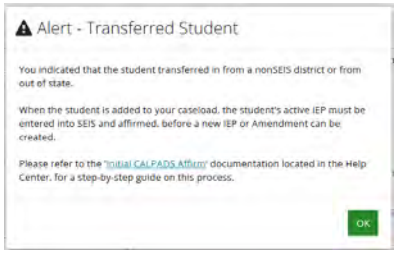
Add Student Form - Caseloads

Providers will submit an **Add Student Form** to request to have a student added to their caseload.

If the student transferred from a non-SEIS district or from out of state, the provider should check the 'Student transferred in from a non-SEIS district of from out of state' checkbox.

This will serve as a reminder for the provider and to the district that the student's active IEP must be entered before the next meeting is held.





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Add Requests

An Add Request does not mean that the student does not exist in the District or SELPA.

The provider is only requesting that the student be added to their Caseload. It is important to verify that the student does not exist in SEIS, before adding a new record.

To process a request, click the Process (+) Icon

To decline a request, click the Decline icon

Once the add has been completed, click the Completed icon (checkmark)

To email the provider, click the Email icon

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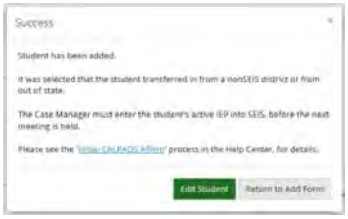
Adding a Student

There should only be one SEIS record per student.

When searching for a student record, search by a combination of the fields, to ensure that a SEIS record does not exist before adding the student.

If a new SEIS record will be created for a student, the date the student enrolled in the district/LEA would be entered into this field and the student record can be added. This is the student's current enrollment date for the new school year.

If the provider checked that the student transferred from a non-SEIS district or out of state, that field will be populated on the Add form. This will serve as the districts reminder to have the Case Manager enter the student's active IEP as soon as the student is added to their caseload.



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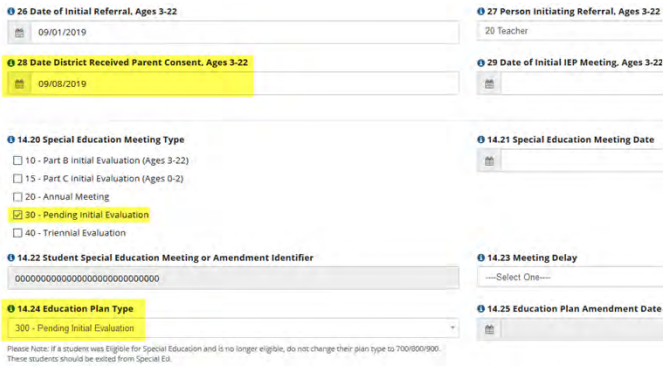
Pending Initial Eval

Once Parent Consent is received:

- The student's SSID must be requested
- The Meeting Type must be updated to 30 Pending Initial Eval
- The students Plan Type must be updated to 300 Pending Initial Eval
- This will create the Pending/300 reportable transaction



SEIS

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http://beta.seis.org

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Requesting a Transfer

If a student in SEIS matches the criteria you searched by, they will appear in the results.

As a District level user:

- If the student exists in your district, the Student Record icon will be displayed
- If the student displays in the results, but is outside of your district, the Request Transfer icon will be displayed

As a SELPA level user:

- You will see the Transfer icon and the Student Record icon, if the student exists in your SELPA
- If the student is transferring districts, the transfer will still need to be requested in order to update the students Reporting LEA.

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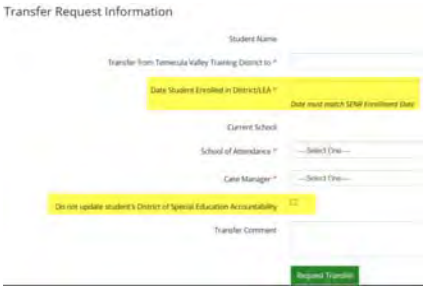
Requesting a Transfer

If the student exists in SEIS and a transfer is initiated, the Date Student Enrolled in District/LEA would be entered on the Transfer Request page.

If the students DSEA should NOT be updated as the student did not move, be sure to check the 'Do not update' checkbox.



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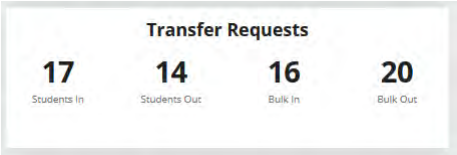
Transfers

Students In: These are the student records that you have requested to be transferred into your district.

Students Out: These are the student records that have been requested by another district.

Bulk Out: Your district has initiated a bulk transfer of students to another district within your SELPA. The students remain in your district until accepted by the other district.

Bulk In: Students that have been sent to your district by another district within your SELPA. These students will not be moved to your district until they are accepted.



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Processing Transfer Requests

From the **Students Transferring OUT** of district notice:

Click the **Process Transfer** icon

You will be directed to the CALPADS Students page to correct any CALPADS errors and complete the Transfer.

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Processing Transfer Requests

Before the student's record can be released, the following validations will run:

- **Unaffirmed Amendment** – If the student has an unaffirmed Amendment, the Amendment will have to be affirmed or deleted, if the meeting was not held.
- **Unaffirmed IEP** – If the student has an unaffirmed IEP, the meeting should be affirmed if the meeting was completed, or the Meeting Date should be changed back to the Current IEP date if the meeting was not held.
- **No transaction in district** – If a CALPADS transaction does not exist in the district/LEA, the student cannot be transferred.
  - If the student transferred into the district, the IEP they transferred in with should be adopted.
  - If a meeting was held and not affirmed, the IEP should be affirmed, to create the IEP transaction.

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Students Transferring INTO District - CALPADS Requirements

When a student transfers with an active IEP, their last meeting (Initial or Plan Review) or Amendment (to the Initial or Plan Review), from their previous district must be adopted and submitted to CALPADS.

This must be done as soon as the student record is released to the district.

If the district does not adopt the IEP and it crosses over Census day or EOY, it will result in the **CERT132** error.

The student's last meeting must also be adopted before the Case Manager can add an Amendment to the student's IEP, for the Interim Placement, otherwise that will result in the SPED0438 error.

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Adopting IEPs

In the **Students Transferring INTO District** notice, when the student's record is released to the district, the status will update to **Complete**.

From this notice the district should click the **Preview Transaction** icon, to adopt the student's last reportable meeting.

If the last reportable meeting was an Amendment, both the IEP and Amendment will be included in the adoption process.

Check/ Uncheck All	Transfer Status	Notes	SEIS ID	SSID	Last Name	First Name	DOB	Transfer From	Transfer To	Transfer Comments	Current IEP Date	Meeting Date (Future IEP)	Meeting Type	Plan Type	Eligibility Status	Enrollment Date	Transfer Processed	Requested By	Requested Date
	Complete		644514	0004343434	Ackerman	Marjoram	10/29/2010	Demo Unified School District State Forms SELPA	Arieis Gratto District State Forms SELPA		09/01/2019	09/01/2019	20	200	Yes	06/06/2022	06/06/2022	Cristy Childers	06/06/2022

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Transferred Students

The students with transferred transactions can also be found by going directly to the Transferred Students notice, in the CALPADS Alerts section of the homepage.

The IEP should **NOT** be adopted by going to the IEP directly and clicking the Preview link.

Due to IEP transactions being manually created to correcting a meeting date or meeting type, a more recent IEP transaction may exist that does not display on the student's IEP history. The ability to adopt IEPs is still available on the IEPs, in the instance that a historical IEP or Triennial needs to be adopted.

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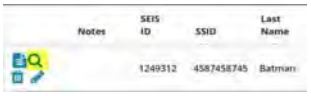
Adopting the Last Reportable Meeting

If the student was Exited or DNQ'd in the previous district:

- Their last meeting does not need to be adopted. The notice can be removed by clicking the **Delete** icon.

If the student transferred in with an active IEP/ISP/IFSP from a SEIS district:

- Click the **Preview Transaction** icon to open and view the transaction.



- Click the and **Adopt/Create Transaction** button.

Now that the last meeting has been adopted, an Amendment can be created to document any changes, if needed, to the student's IEP/ISP/IFSP.

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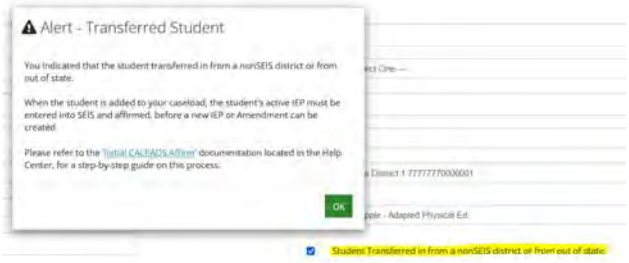
Adopting the Last Reportable Meeting

If the student transferred in with an active IEP/ISP/IFSP from a nonSEIS district:

- If the student's active IEP (Initial or Annual) or Amendment (to the Initial or Annual) was held outside of SEIS, the notice can be removed by clicking the Delete icon as that is not the meeting that should be adopted/submitted to CALPADS.
- It is critical that the Case Manager enters the student's active IEP (Initial or Annual) as soon as the student is added to SEIS and BEFORE the next meeting is held or Interim Placement is entered.
- The Interim Placement is an Amendment to the student's IEP. It should NOT be entered onto the Future IEP. This has caused a lot of errors by not documenting the IEP in SEIS prior to adding the Interim Placement.



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Initial CALPADS Affirm

On the Student Record, **CALPADS Student** page:
- Review each field and make the appropriate selection, based on the hard copy IEP or this can be verified in CALPADS.
- 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.

Click **Continue** as there should not be any CALPADS errors.

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

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

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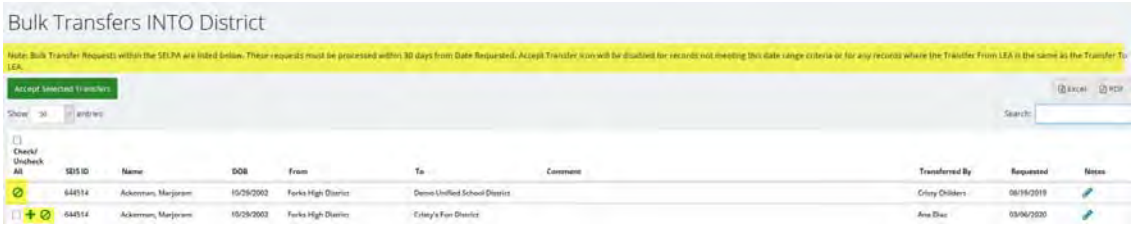
Bulk Transfers

When students are Bulk Transferred to another district within the SELPA, the last reportable transaction will automatically be adopted/created when the receiving district accepts the transfer.

Bulk Transfers must be processed within 30 days from Date Requested. If not, the Accept icon will be disabled.



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Bulk Transfers

Bulk transfers for students that are moving to another district for the next school year, must wait until 7/1 or later.

When the transfer occurs, we move the last reportable transaction to the new district. Since these students will not be enrolled in the new district during this academic year, the new district will receive 2 errors.

- SPED0006 - Invalid Academic Year
- GERR0005 – SPED record must have an overlapping enrollment record in the Reporting LEA

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IEP/CALPADS Changes

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

This notice can also be used if the provider affirmed with the incorrect Meeting date/Meeting Type or for any other IEP/CALPADS related questions.

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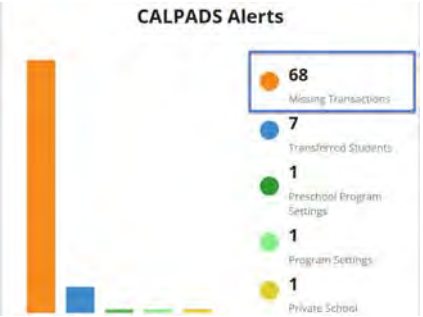
CALPADS Alert - Missing Transactions

Another notice to check is the **Missing Transactions.**

This notice displays any student in the district that does not have a CALPADS transaction.

If the student transferred in and their IEP has not been adopted, the student will display in this notice as well. Once the IEP is adopted, the student will be removed from both notices (missing and transferred).



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CALAPDS Alert – Program Setting

The projection fields on the Ed Settings form will populate the Program Setting / Preschool Program Setting CALPADS Alert.

The student will appear on the alert 30 days before the projected Start Date and will remain on the notice for 45 days after the projected start date.

An Amendment MUST be created to officially document the new Program Setting and Percent Range.

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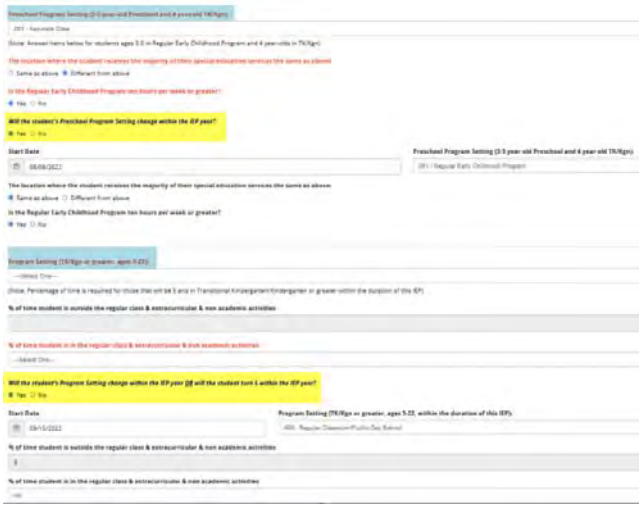
Educational Setting - Program Setting

The Program Setting (14.31c) and Percent Range must be selected for students that are 5 years old and Kindergarten or higher.

If a meeting is held and the student is in Kindergarten but is not 5 yet, but will be within the IEP year, a Projected Program Setting should be entered.

This will create an alert on the homepage to add an Amendment to 'officially' update the student's Program Setting and Percent.

The Amendment update will create a transaction to be reported to CALPADS.



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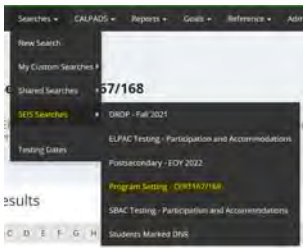
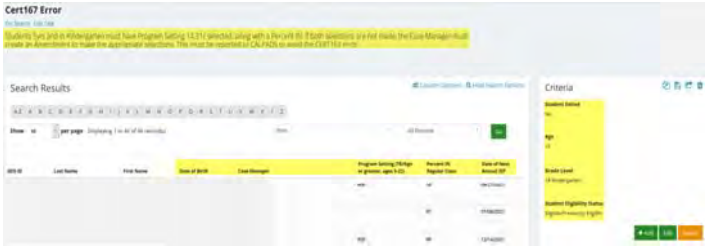
Program Setting Search

This search will display any student who is 5 years and in Kindergarten and what, if any, selection is made in field 14.31C and Percent IN.

If a selection is not made, or it is incorrect, the Case Manager must create an Amendment to make the selection or correction.





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CALPADS Alert – Private School

Private School alert will display any student ages 6-22, that is attending a Private School and their Plan Type is **not** 200.

Any student that is attending a private school and receiving services from the district must be on a Plan Type 200 with a Program Setting of 403.

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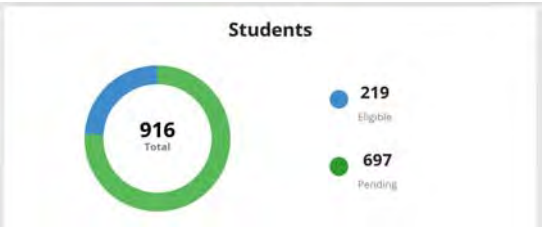
Students

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 Evaluation should be listed as Pending.



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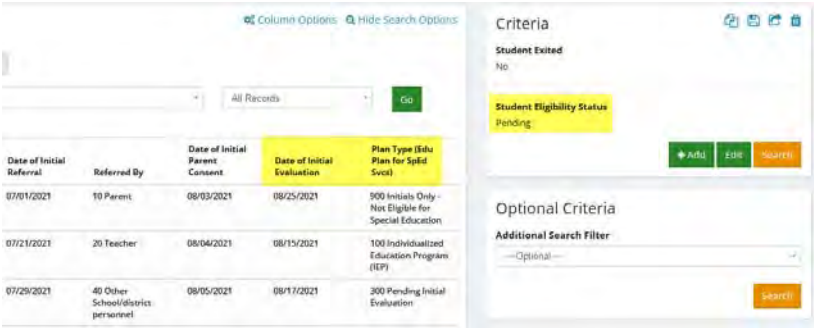
Pending Students

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).



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Follow Up

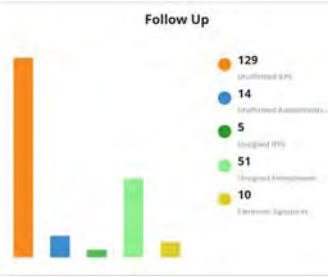
Unaffirmed IEPs
A student will pull into this notice if the IEP date on the Future IEP is after the IEP date on the Current IEP.

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 crucial that IEPs and Amendments are affirmed as soon as the meetings are held/completed.

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Meeting Alerts

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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
  - The student is removed from the notice once their eligibility is updated to Eligible or DNQ.
- **Initial Placement / 30 Day Reviews** Displays students who have transferred into the district from another SELPA, within the last 30 days.
  - The student is removed from the notice 14 days after the 30-day projection
- **Student Turning 3** pulls in students that will turn 3 within 30 days
  - The student is removed 7 days after their 3rd birthday
- **Infant Initial Evals** pulls from the Infant Parent Consent Date field
  - The student is removed from the notice once their eligibility is updated to Eligible or DNQ.
- **6 Month Review** pulls from the Next IFSP Date field on the Infant Data Sheet

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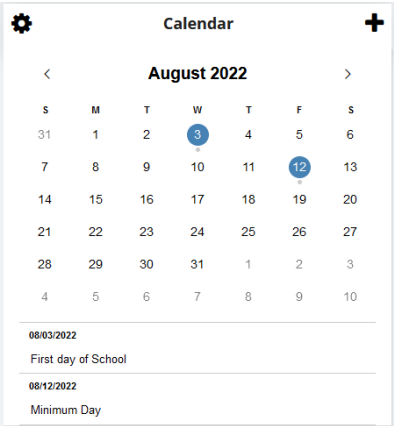
Calendar



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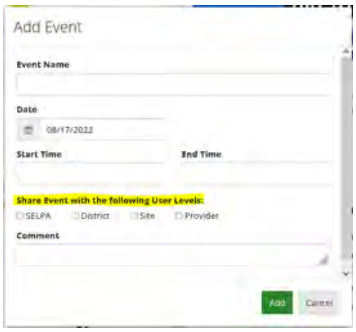
Calendar

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.

At the district and SELPA level, events can be added and shared with all user levels.



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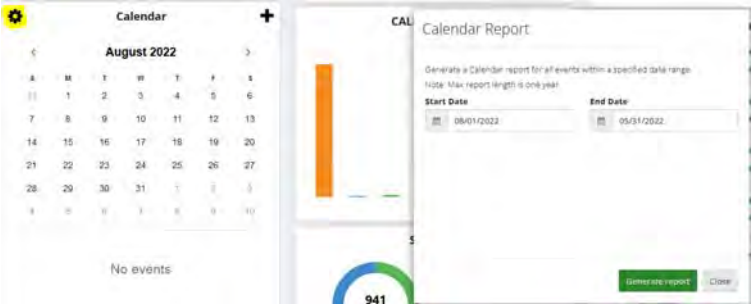
Calendar

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

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



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SEIS News

SEIS News alerts users of system down times, release notes for our system updates and important information that we need to get out to all users.

It is very important that the SEIS News Items are reviewed daily.

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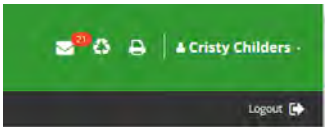
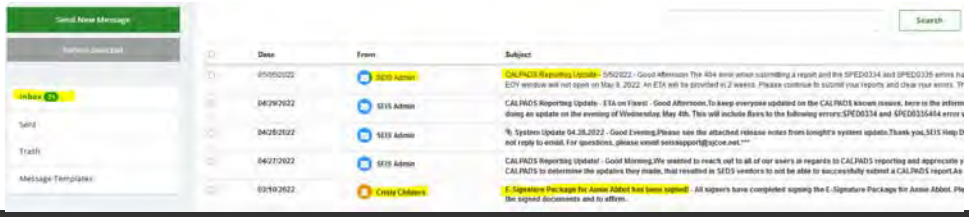
Message Center

The Message Center is where all SEIS communication should occur between providers, districts and the SELPA.

The Message Center is also where SEIS send important information to users.

The unread message alert displays on the Message Center icon.





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Students

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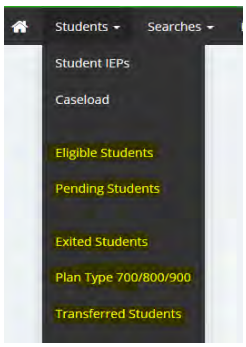
Accessing Students

Student IEPs will show all Eligible and Pending Students. This where the Student Record, IEPs and Progress Reports are accessed.

As an Admin level user, you can view **Eligible, Pending, Exited, Transferred and DNQ'd students.**



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Student IEPs

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

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

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Caseloads

The **Caseload** page will display all providers and the ability print or download their caseload.

Provider Caseloads

Print Caseload(s) | Download Caseload(s) | Excel | PDF

Show 50 entries | Search:

Provider Name	Provider Type	District	School(s)	Eligible	Pending	Case Manager	Total Students
Teacher, Terrific	Credentialed School Psychologist	Cristy's Fun District	Awesome School of Fun, Fun High School	1	2	2	3

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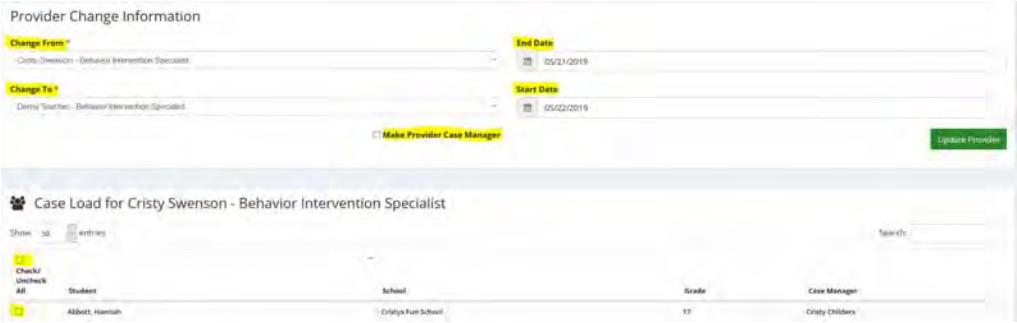
Updating Providers in Bulk

Caseloads can be bulk updated.

From the **Students** section of the upper navigation bar, select **Bulk Update Providers**.



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The Student Record

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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.

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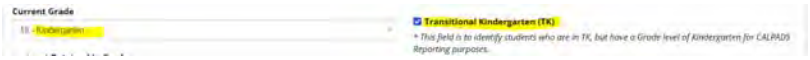
Demographics

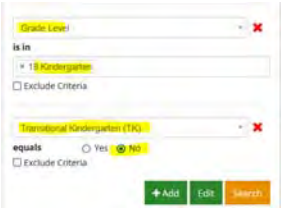
The Fields on the Demographic page are obtained from the student registration packet, including Race, Ethnicity, Language, Household information, etc. These fields can be including in your nightly integration so that they can be automatically updated each night.

As a reminder, TK is not a special education grade level. Any student that is in TK must be graded as Kindergarten for SPED purposes.

A TK field has been added to SEIS to identify the students that are graded as Kindergarten but are in TK.

This will ensure that when grade rollups occur that these students are not moved up to 1st grade.





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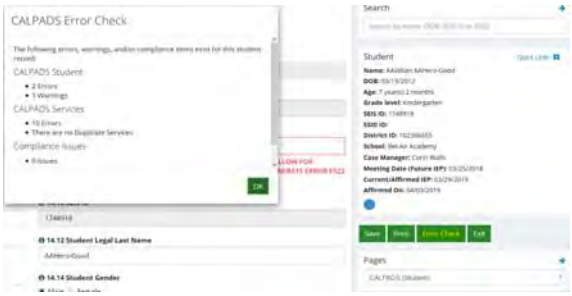
CALPADS Student

The CALPADS data entered on the IEP forms links to the CALPADS Student page.

The CALPADS Student page stores all CALPADS fields needed to create the IEP transactions.

An error check is run when a students Eligibility status is updated, an IEP is affirmed or if a student is exited or transferred.



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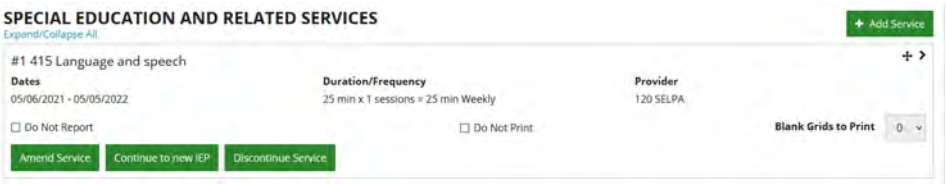
CALPADS Services

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

If a duplicate service exists (same service code and provider location) one of the services must be marked Do Not Report.

When a service is discontinued or Amended, it will automatically be marked Do Not Report.

Services marked Do Not Report will not pull into the CALPADS transaction.



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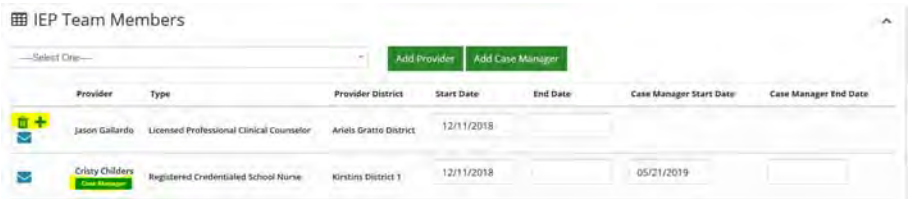
Adding / Removing Providers

Adding or Removing a provider from a student is done on the CALPADS Services page.

Only Teacher level users will display in the IEP Team Members drop down.

- To **add a provider**, Select the provider from the drop down and click the Add Provider or Add Case Manager button
- To **remove a provider**, click the Delete icon
- To **make an existing provider a Case Manager**, click the "+" icon



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History

The History page allows users to view updates made to the student in the following areas:

- Status Update
- Plan Type Updates
- Bulk Updates
- School of Attendance
- DSEA
- Transfers
- Exits

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History – IEP

The IEP History page displays all affirmed IEPs, Amendments and Progress Reports.

Click the **View IEP** icon to be directed to the IEP or Amendment

Date	Type	IEP/ISP/IFSP Meeting Type	Affirmed By/Date	Progress Date	Amendment Purpose	Amendment Affirmed By/Date	Amendment Deleted By/Date	Exit/DNQ Date	Comments	Attachments
05/04/2022	Future	Plan Review,Eligibility Evaluation								No
03/29/2022	Current	IFSP Plan Review	LVN Apple 04/13/2022							Yes
04/11/2022	Amendment	IFSP Plan Review			Amendment	LVN Apple 04/13/2022				No
03/29/2022	Historical	IFSP Plan Review	Ana Diaz 04/07/2022							Yes
09/29/2021	Drop/Transfer Copy							10/27/2021		No

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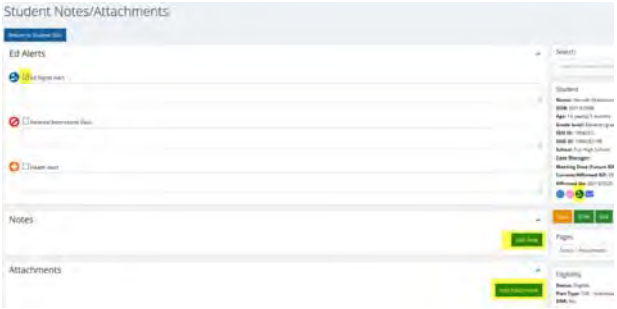
Notes and Attachments

This is where documents or notes about the student, not related to the IEP can be added.

This is also where Ed Rights, Parental Restrictions and Health alerts can be entered.

If an Ed Alert is checked, it will display the icon in the Student Info box.

This is where the student's Current IEP and Last Eval were uploaded to.



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Transportation

The SELPA or district can manage transportation in SEIS. *It is not required to enter or manage transportation data in SEIS.*

Multiple transportation rows can be added, if a student receives different types of transportation services.

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The IEP

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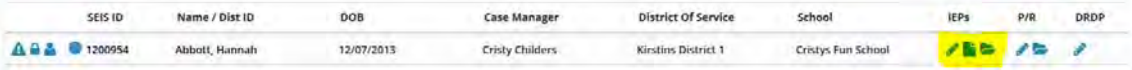
Accessing the IEP

The IEPs can be accessed from the Student IEPs page.

- Click the Pencil icon to access the **Future IEP**
- Click the Paper icon to access the **Current IEP**
- Click the Folder icon to access the **Historical IEPs**



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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

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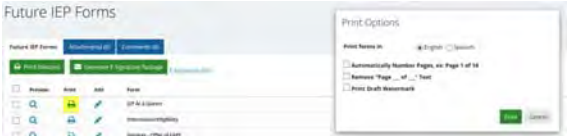
Print Queue

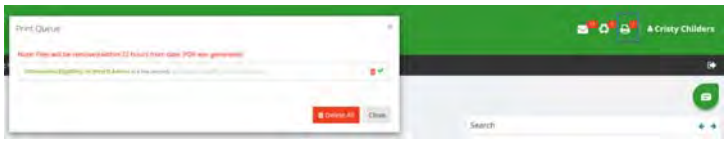
Click the **Printer** icon.

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.



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Future IEP – Meeting Types

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

- **Initial**
- **Plan Review**
- **Eligibility Evaluation**
  - An Eligibility Review (Triennial) is **NOT** an Amendment.
  - An Eligibility Review meeting is **only** to determine eligibility and disability.
    - If ANY IEP Plan fields are updated, Plan Review must be selected as well.
    - This does not mean that the Next Plan Review date needs to be updated.
  - If testing is not completed, the meeting **CANNOT** be opened and affirmed just to remain in compliance. If the meeting cannot be held and it becomes late, select the appropriate Meeting Delay code.
- **Plan Type changes** (IEP to ISP or ISP to IEP)

All other types of meetings **MUST** be held as an Amendment.

- This includes Interim Placements. Interim Placements are **NOT** completed on the Future IEP.

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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.

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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

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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.

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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.

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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.

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Managing Services

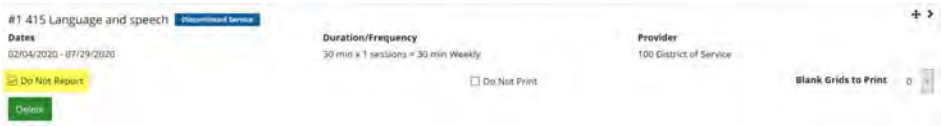
If a service is being discontinued, click the **Discontinue Service** button.

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.

If a student is Exiting from SPED, all services can be discontinued, but they should NOT be deleted from the Services form, as services the student was receiving must be included in the Exit IEP transaction.



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Affirming the IEP

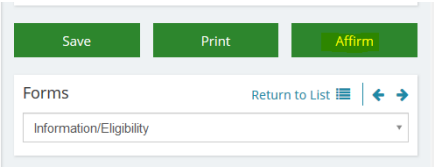
Once the IEP has been held, it should be affirmed as soon as possible.

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.



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Affirming the IEP

Step 1: Verify Meeting Information

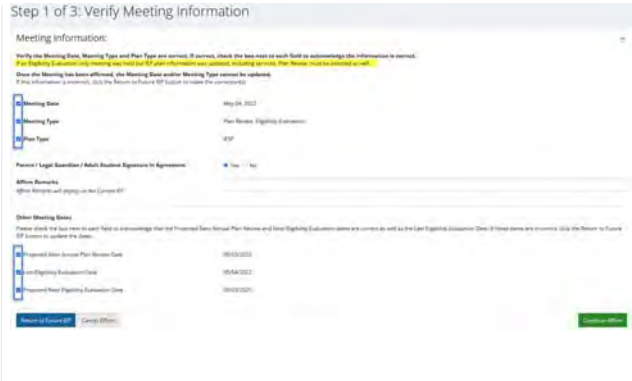
To ensure that the IEP/ISP/IFSP is affirmed with the correct information, each field must be checked, acknowledging that the Meeting Date, Meeting Type and Plan Type is correct.

If the parent did not sign in agreement, select No. This will place the student on the Unsigned IEP notice. Once a signature is obtained, the signature field can be updated.

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.



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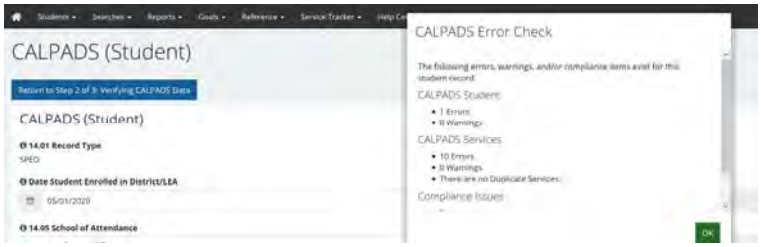
Affirming the IEP

Step 2: CALPADS Errors

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.



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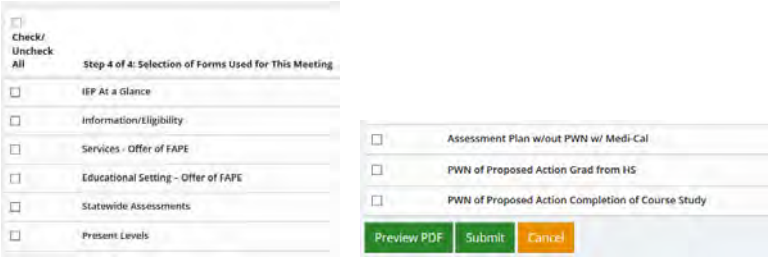
Affirming the IEP

Step 3: Select Forms used in the Meeting

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



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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 Future IEP should be updated with the correct Meeting Date and/or Meeting Type and affirmed.
  - 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**
  - The IEP would not be able to be updated with the correct information as the same IEP would not be able to be affirmed after an Amendment or another meeting was held.

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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

	SEIS ID	SSID	District ID	Last Name	First Name	DOB	School of Attendance	Meeting Type	Meeting Date	Plan Type	Amendment Date	Parent Signature	Transaction Created	Transaction Type
	1200954	1234567891		Abbott	Hannah	12/07/2013	Awesome School of Fun	20	07/21/2019	100		Yes	07/21/2019 1:51 pm	Affirmed IEP

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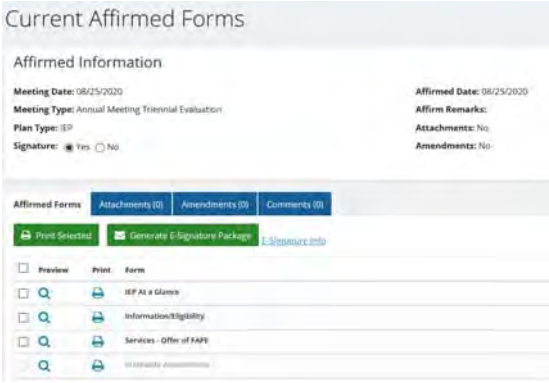
Current IEP

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 on the affirmed IEP.



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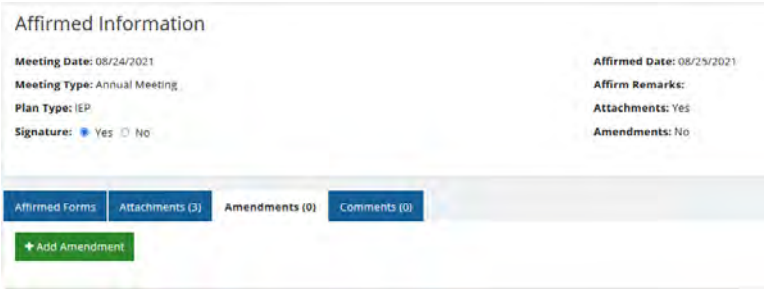
Amendments



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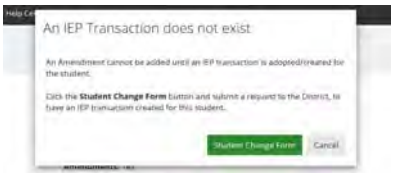
Adding an Amendment

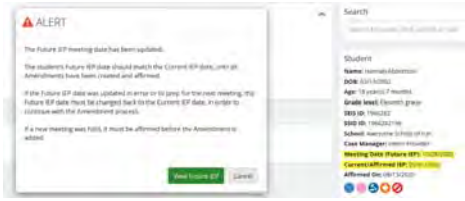
From the Current IEP, click on the Amendments tab, then click the **Add Amendment** button.

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.



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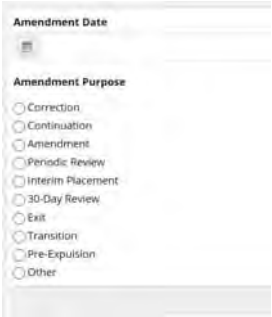
Amendment Purpose

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.



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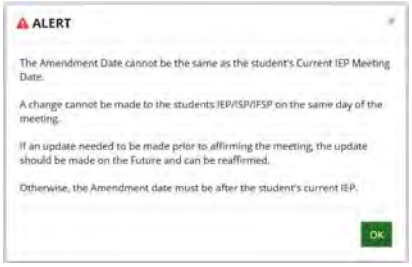
Amendment Date

When an Amendment is added, the Amendment date should not be 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.



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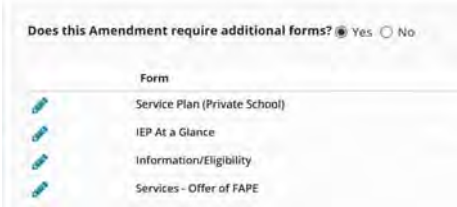
Editing an Amendment

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.'



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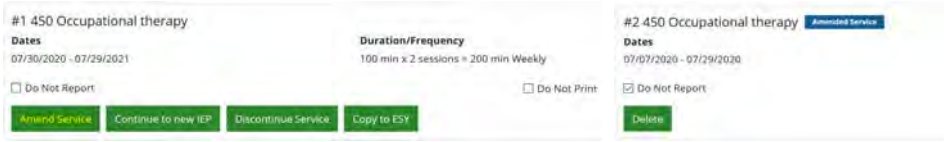
Managing Services

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.



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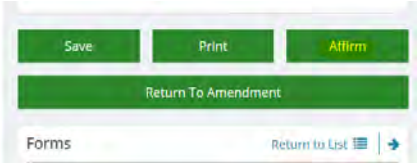
Affirming an Amendment

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

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



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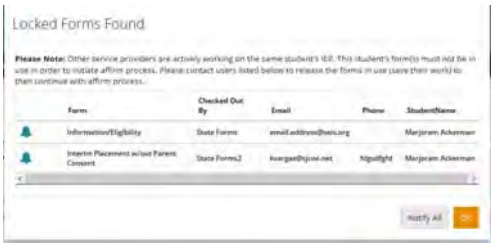
Forms in Use

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.



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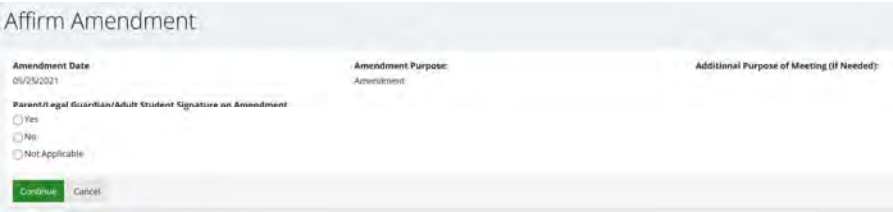
Affirming an Amendment

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.

If No is selected, it will add the student to the Unsigned Amendment homepage notice.



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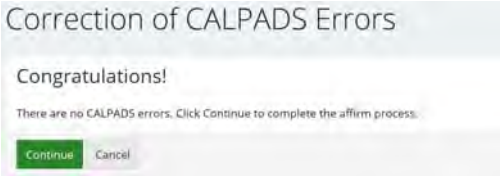
Affirming an Amendment

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



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Affirming an Amendment

Select the forms that were used for the Amendment 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

Click the **Submit** button

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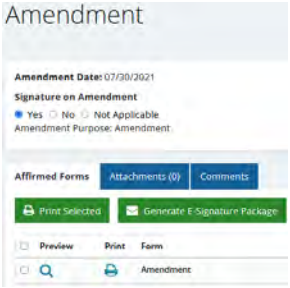
Affirmed Amendment

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

Click the **View/Print** icon to:

- View/print the forms
- Add Attachments
- Add Comments
- Send an E-Signature package



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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

	SEIS ID	SSID	District ID	Last Name	First Name	DOB	School of Attendance	Meeting Type	Meeting Date	Plan Type	Amendment Date	Parent Signature	Transaction Created	Transaction Type
	1966282	1234567891		Abbottson	Hannah	03/28/2016	Awesome School of Fun	10	03/27/2019	100	07/24/2019	Yes	07/24/2019 12:47 pm	Amendment

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Searches

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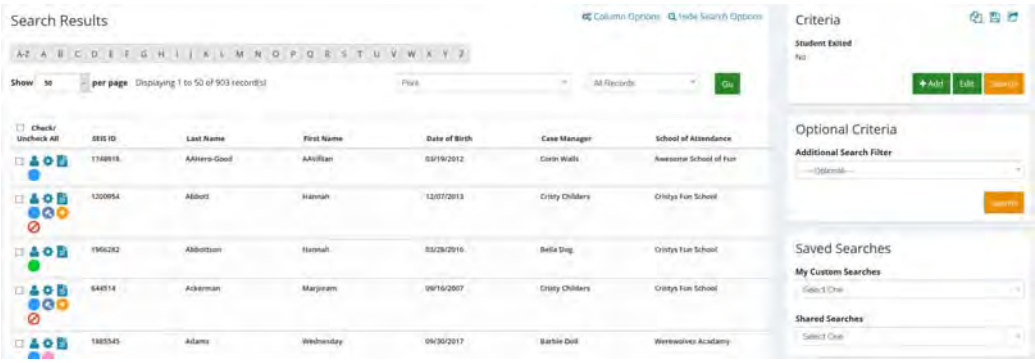
Searches



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Searches in SEIS

All fields on the Student Record can be included a search filter or column option. This includes Custom fields.

Specific fields from the IEP forms have been linked to the Student Record, for the purpose of generating reports. These fields can be found on the IEP Information page.

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Filtering Students

Criteria

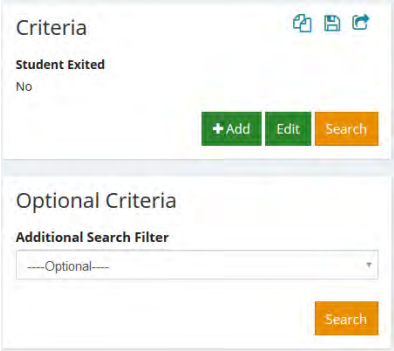
Adding filters will allow you to narrow down the results to a specific group of students.

Filter by any field on the student record, including custom fields.

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

Optional Criteria

This allows you to search for Transferred students or students who are not served in this district but are residents.



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Column Options

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

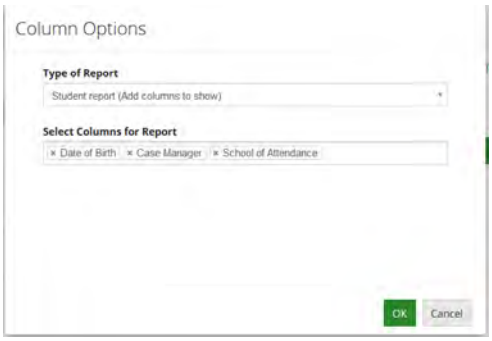
Type of Report

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

This will pull in data specific to the report, such as all information on the service grid, DRDP status and Duplicate records.

Select Columns for Report

Select any field from the Student Record or custom Field.



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Duplicate Records

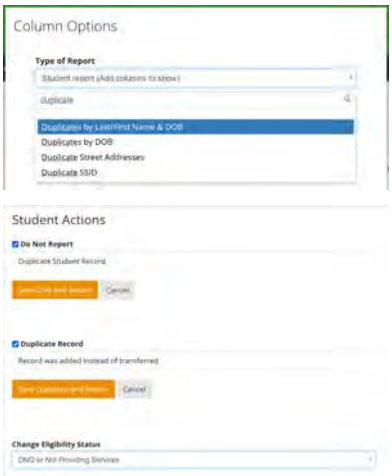
A search can be generated to find duplicate records based on Name, DOB or SSID.

If a duplicate record is found, it should be determined which record has the most up to date IEP information and should be used going forward.

For the record that will not be used, the IEPs and additional information can be downloaded and attached to the record that will be used.

The record will be marked Do Not Report and Duplicate Record. Then the status will be changed to DNQ.

This will "hide" the student from the Add Student search so that the duplicate record is not requested.



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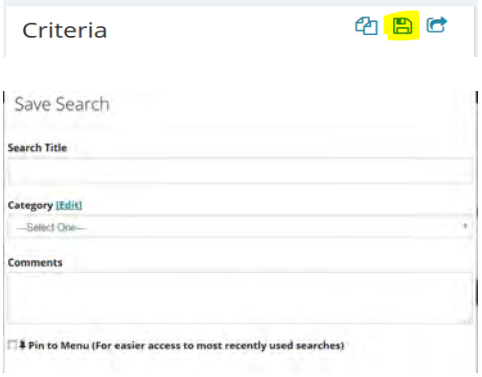
Saving a Search

Searches can be saved to allow users to easily access their most common searches without having to recreate the search each time.



To Save a search

- Create the search
- Click the **Save** icon
- Title the search and select a category
- Click **Edit** to create a new category
- Add any additional comments about the search

You can **Pin** the search for quicker access.

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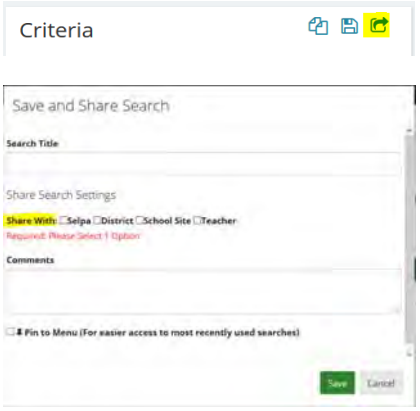
Sharing a Search

Searches can be shared with all user levels.

This is a great way to have staff review, update or fix issues before they become errors or noncompliant.



To Share a Search

- Click the **Share** icon
- Title the search
- Select which user levels can view the search
- Add any additional comments about the search

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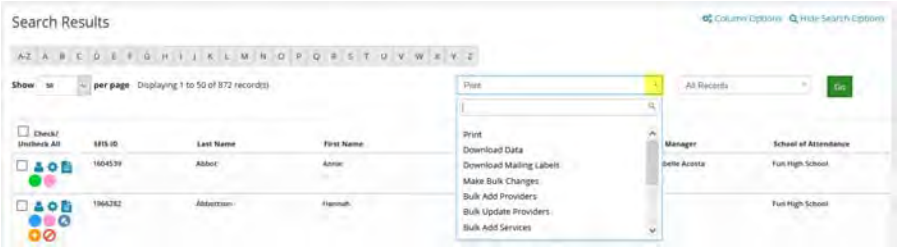
Tasks to Perform

From the Search Results, you can:

- Access the Student Record
- Access the student's IEP
- Perform tasks such as Printing, downloading the results to Excel, bulk updating bulk transferring and bulk printing



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Bulk Printing

Users can Bulk Print IEP forms and Progress Reports.

Bulk Print IEPs will pull from the student's Future IEP.

Bulk Print Progress Reports will pull the last affirmed Progress Report.

To Bulk Print IEP forms:

- Select the students to be included in the bulk print
- From the drop down, select **Bulk Print IEP forms**
- Click Go
- Select an IEP form
- Click the Submit Print Job button

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Bulk Updating

Easily update a field for a group of students. Bulk update fields such as: Grade levels, Schools, Exit Dates and Exit Reasons.

- Select the students to include in the bulk update
- Select **Make Bulk Changes**
- Click **Go**

On the Bulk Update page:

- Check the box next to the field that will be updated
- Select an option
- Acknowledge the students will be updated
- Click **Update**

It is important that the field is checked and that a value is entered or selected.

If not, the student records will not update or will be blanked out.

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Bulk Updating Providers

A provider's caseload can be bulk updated to another provider, or a provider can be removed from a group of students.

- In the search criteria, select **Service Provider (Teacher Name)**
- Click Search
- Select the students that should be removed from the provider
- Select **Bulk Update Providers**
- Click Go

On the Provider Info page:

- Select the Provider in the **Change From**
- If the provider's caseload will be updated to another provider:
  - Select the new provider's name
  - If the new provider will be the Case Manager, check the Make Provider Case Manager checkbox.
- If the provider is simply being removed from a group of students:
  - In the Change To field, select 'Remove this Provider'.

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Bulk Transferring Students

Students can be Bulk Transferred to another district within the same SELPA.

The Bulk Transfer is initiated by the SENDING district. Up to 200 students at a time.

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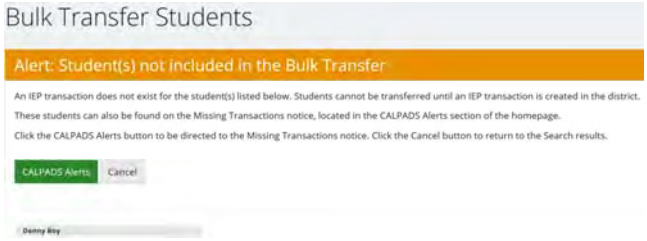
Bulk Transferring Students

When the bulk transfer is initiated, any student that does not have a CALPADS transaction in the district or has an e-signature in process will not be included in the bulk transfer.

A transaction would need to be created for the student(s), then another bulk transfer can be initiated for those students.

When the bulk transfer is accepted, the student's last reportable transaction (Initial, Annual or Amendment) will be moved to the new district.



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Reactivating a Student Record

For Exited and DNQ'd students, their Student Record can be reactivated from the Search results.

Click the **Action** icon

Click **Activate Student** to restore the student record to a Pending status.

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Additional Reports

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Student Report

This report pulls in all Eligible and Pending students as well as students that were Exited or DNQ'd within the current school year (7/1 - 6/30).

A Student and Services file will be created based on the live student data on the CALPADS Student and CALPADS Services page of the student record. The report is not in place of the CALPADS report or contain transactions.

This is a great report to run throughout the year. This way the district can go back and verify information as of a specific date.

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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

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Goals

Goals → Goals Report

- Providers and the district 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.

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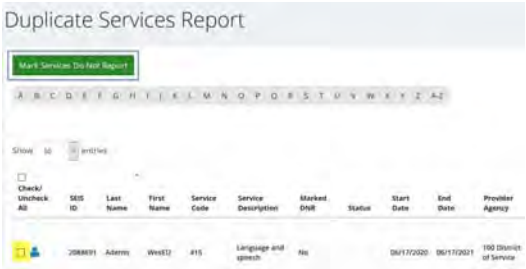
Duplicate Services

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.



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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.

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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.

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Services by School Site

This report will produce a list of Specialized Academic Instruction and Related Services by School Site, which may be used for the Annual Service Plan report, submitted by the SELPA.

The report will display all Eligible students and their services, listed by School of Attendance.

District level: The report will generate based on the schools in the district.

SELPA Level: The report will generate based on all schools in the SELPA. The report can be filtered per district.

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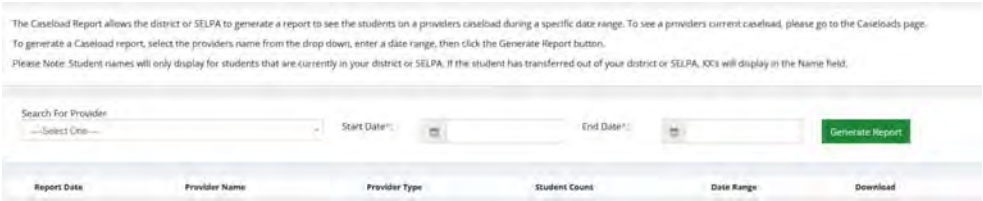
Caseload Report

The Caseload Report allows the district or SELPA to generate a report to see the students on a provider's caseload during a specific date range. *To see a provider's current caseload, go to the Caseloads page.*

Select the Providers name from the drop down and enter a date range. Then click the **Generate Report** button.



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CALPADS

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CALPADS

The CALPADS section of the upper navigation bar is permission based and will display for District and SELPA level users.

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Permissions

At the **District level**, the following permissions are needed to generate a report and view/edit transactions.

A CALPADS login is required to submit a report.

☑ Generate CALPADS Reports	Can run CALPADS Reports
☑ Edit CALPADS Transactions	Can Edit/Mark Do Not Report CALPADS Transactions
☑ Create CALPADS Transaction	Can create CALPADS Transaction for an affirmed IEP/Amendment

At the **SELPA level**, the following permissions are needed to generate a report, view/edit transactions and view/edit errors uploaded by the districts.

☑ Generate CALPADS Reports	Can run CALPADS Reports
☑ Edit CALPADS Transactions	Can Edit/Mark Do Not Report CALPADS Transactions
☑ View CALPADS Errors	Can view/fix CALPADS Errors posted by Districts/LEAs

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Reviewing Transactions

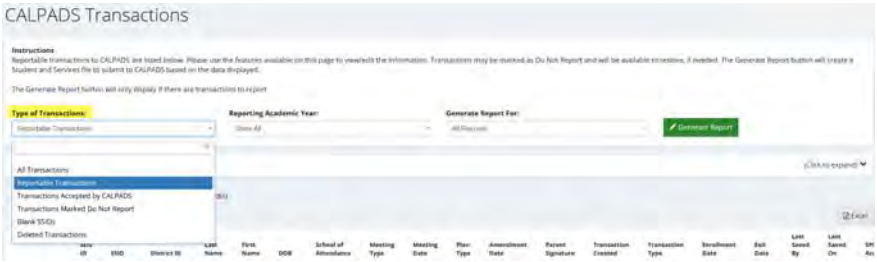
Reportable Transactions: This will display all CALPADS transactions that have not been accepted by CALPADS.

Transactions Accepted by CALPADS: This will display all CALPADS transactions that have been accepted by CALPADS.

Transactions marked Do Not Report: This will display all CALPADS transactions that have been marked DNR. DNR transactions can be restored.

Blank SSIDs: This will display all CALPADS transactions that do not have an SSID number.

Deleted Transactions: This will display all transactions that were previously marked DNR and have been deleted. Delete transactions can be restored.



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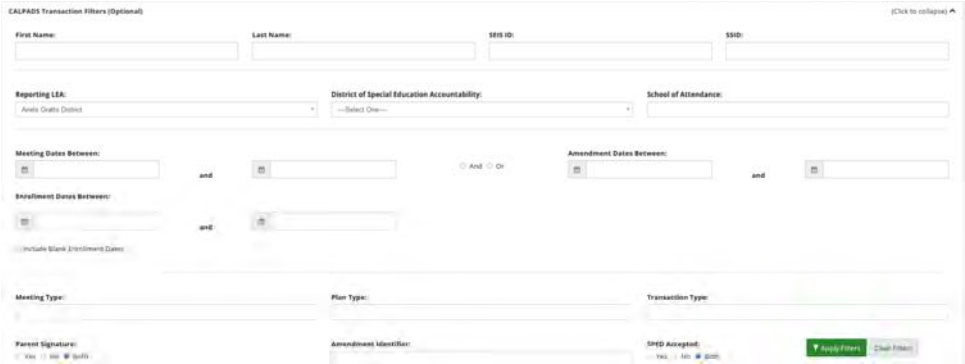
Reviewing Transactions

Use the CALPADS Transaction Filters to narrow down the results to a specific student, Meeting Date range or Transaction type.



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Reviewing Transactions

The transaction will remain reportable until the SPED and SSRV records are accepted (SPED and SSRV = Yes).

- To Edit/View a transaction, click the **Edit** icon
- To mark a transaction Do Not Report, click the **DNR** icon
- To leave a comment about a transaction, click the **Comment** icon
- To view the student's IEP history, click the **View IEP** icon

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Generating a CALPADS Report

A report should be generated for all reportable transactions.

To generate a CALPADS Report, click the **Generate CALPADS Report** button.

This will direct you to the **CALPADS Generated Reports** page.

Download the Student and Services file into Excel by clicking the Student and Services links.

To view the file types and data, click the **Expand** icon or anywhere in the row.

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Report Types

Based on the types of transactions that can be created, the source transaction will be updated when the following occurs:

Type 1 – Pending: Pending transactions will be created each night, based on the following criteria:

- Eligibility Status = Pending
- Referral Date/Referred By is entered
- Parent Consent date = within the current school year
- Initial Evaluation Date = Blank
- Meeting Type = 30
- Meeting Date = Blank

Type 2 – IEP: If an IEP is affirmed and an IEP transaction with the **same Meeting Date/Meeting Type** already exists, but there was a **change to the CALPADS fields** (sped or services), the original transaction will be **replaced** with the new affirmed IEP transaction data.

- If the user affirmed an IEP with Plan Review selected, but it was supposed to be an Eligibility Evaluation as well:
  - The user would go back to the Future IEP, select Eligibility Evaluation (keeping Plan Review selected), and reaffirm.
  - An Eligibility Evaluation transaction would be created. A duplicated Annual transaction would **not** be created.

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Report Types

Type 3 – Amendment: If an Amendment is affirmed and any of the Amendment reportable fields were updated from the Current IEP, an Amendment transaction will be created.

Type 4 – DNQ: When a student is DNQ'd a DNQ transaction will be created. Specific fields will be removed from the transaction (not from the student record), based on the CALPADS requirement to not have certain data fields submitted with a Plan Type 700, 800 or 900 record.

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Submitting to CALPADS

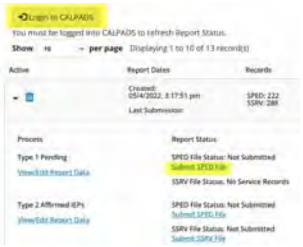
To Submit your report, click the **Login to CALPADS** button.

This will direct you to the CALPADS Login page.

Enter your CALPADS username and password.

You will automatically be directed back to SEIS.

Click the Submit SPED File link

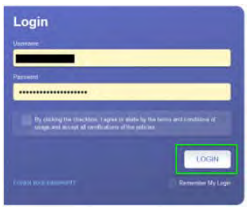


Once you submit your report, the link will update to Refresh Status.

Refresh the status until the report comes back as Rejected or Posted

If the file is rejected, that means there were 1 or more CALPADS errors.

The errors must be corrected before you can move on to the next Report type.



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Posting Errors

The CALPADS Errors can be posted to the homepage so that the selected users can review and correct the errors.

Click the Post Errors/Manage to Homepage Notice link

Enter a message that will display for users on their homepage

Select the User Levels that should see the errors/warnings on their homepage

Click the **Post CALPADS Errors** button

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Fixing Errors

On the CALPADS homepage notice, click the **Fix Errors** button.

The Errors columns will display the Severity, Code and Description the Error.

Click the **Wrench** icon to fix the error on the transaction.

This DOES NOT update the Student Record.

	SEIS ID	SSID	Last Name	First Name	DOB	Meeting Type	Meeting Date	Case Manager	School	Severity	Code	Description
	[redacted]					20	03/20/2007	[redacted]	Redwood Elementary	Error	SPED0342	Missing Primary Residence Code
	[redacted]					20	03/20/2007	[redacted]	Redwood Elementary	Error	SPED0378	Invalid age for IEP Includes Postsecondary Goals Indicator

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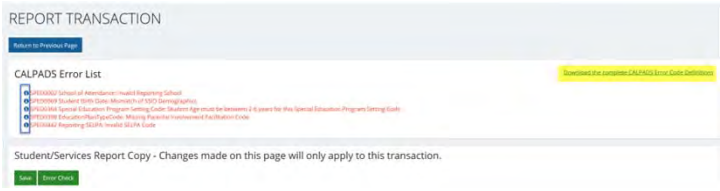
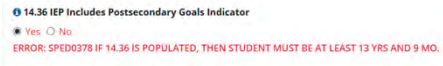
Fixing Errors

All errors will display at the top of the page. An **info** icon has been added to display the description of the error and the validated fields.

The full list of the CALPADS Error Code definitions can be downloaded.



The error will display next to the field as well.



Once corrected, save the page. The errors will be removed from the list and the homepage error notice.

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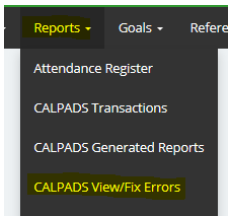
Viewing/Fixing at the SELPA Level

SELPA level users can view the errors uploaded by the districts, by going to **Reports → CALPADS Fix/View Errors**

This is to allow the SELPAs to be able to assist the districts with the error correction process.

The view is the same as the homepage error notice.



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Administration

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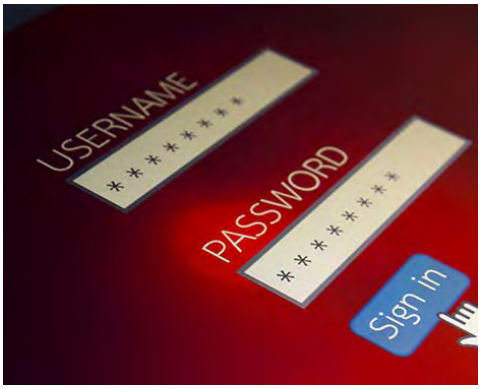
Manage Users



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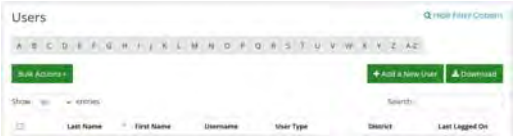
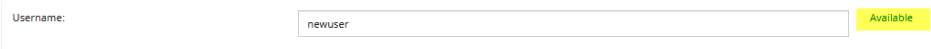
Adding a New User

Click the **Add a New User** button



The Username is validated against all users in the system and can only be used once.



The users email address is required and it is highly recommended to enter their work phone and cell phone number.

The cell phone number is used to send the password for the E-Signature feature.

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User Levels

Shared Users

- Provider level user can be shared with all districts within the SELPA
- School Site level users have a home district and can be shared with all schools in the district
- District level users only has access to the students in their district
- SELPA level users can be shared with all districts within the SELPA

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Permissions

If no permissions are selected, the Student Record and IEPs will be read-only.

Providers must have the **Edit Student Record** and **Edit IEPs** permission in order to affirm.

The **Can Affirm IEP** and **Can Affirm Progress Reports** permissions allow users that are **NOT** the case manager to affirm. This should be rarely be given, as only the case manager should affirm.

	Permission	Description
☐	Assign Providers	Can assign providers to grant access to student record/IEP
☐	Can Affirm Progress Reports	Can affirm progress reports regardless of Case Manager status
☐	Can Affirm/Attest IEP	Can affirm/attest IEP regardless of Case Manager status
☐	Change Eligibility Status	Can update eligibility status for student (Pending/Eligible/Not Providing Services)
☐	Edit IEPs	Can edit future IEPs
☐	Edit SSID Number	Can edit the SSID number on the student record
☐	Edit Student Record	Can edit information on student record (Required to Affirm IEPs)

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Permissions

There are a few permissions that should be used with caution

- **Can Create CALPADS Transactions**
  - ONLY district level users that are responsible for reviewing SPED data/CALPADS transactions should have this permission
- **Can Bulk Upload Enrollment Dates**
  - Only district users that have access to the SIS data should have this permission
- **Permanently Delete Students**
  - This permission should only be activated when a student record was accidently added (with no information)
- **Manage School/District**
  - Only select staff should be able to add and edit schools
- **Make Bulk Changes to Students**
  - Only select staff should be able to make a bulk update to a group of students

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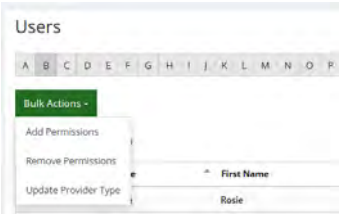
Bulk Update Permissions

The Bulk Add and Bulk Remove feature allows you to add or remove permissions to a group of users.

Select the users that should be included in the bulk update.

Click on **Bulk Actions** and select **Add** or **Remove permissions**

Select the permissions that should be added or removed, click Acknowledge, click the Bulk Add or Bulk Remove button.



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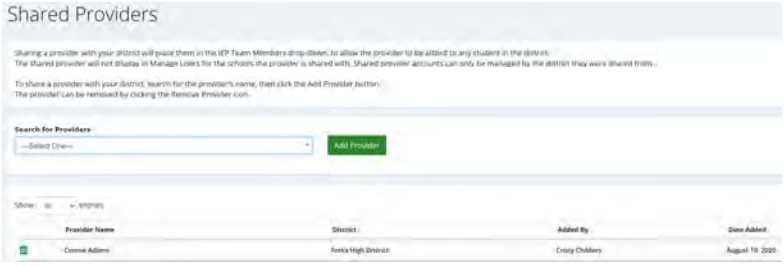
Shared Providers

If a provider needs access to a student in another district, that district can share the provider with their district.

When the provider is shared, they will be added to the IEP Team Members drop down.

They are not added to Manage Users, so the shared district is not able to edit the user's permissions.



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Editing and Deleting User Accounts

A NEW ACCOUNT MUST BE CREATED if a user's name changes, their home district changes or their user level changes**.** Everything in the system is tied to a user ID and most features in the system are user level based.

If a user's permissions, email or phone number need to be updated, their account can be edited.

- To **Edit** a user's account: Click the Edit icon
- To **Delete** a user's account: Click on the **Delete** icon.

For any provider that has a caseload, all students must be moved from their caseload, prior to deleting their user account

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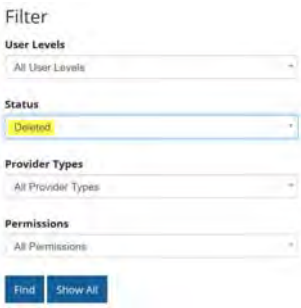
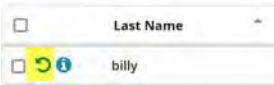
Restoring User Accounts

To restore a user account, filter by Status = Deleted

Click the **Restore** icon next to the user's name.





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Manage School / District

Schools are added and managed by the District and/or SELPA.

From the Manage School/District page, schools can be viewed, edited and downloaded.

- To add a school, click the **Add a New School** button
- To view/edit a school profile, click the **Edit** icon

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Manage School / District

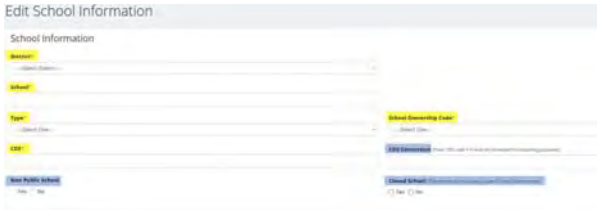
The **School Ownership Code** is based on the schools CDS code, found on CDE's Public School Directory.

The **Non-Public School** field will auto populate based on the School Type that was selected.

CDS Conversion:

- Duplicate CDS codes cannot be entered. If there are multiple school site that need to be added, but need to be reported under one CDS code, one school will be added with the correct 7-digit school code. The additional schools will replace the last number with a letter (123456a). The correct CDS code should be entered into the CDS Conversion field.
- For private schools, the school's CDS code would be entered and the CDS Conversion would be 0000002.

If a school has closed, selecting Yes for **Closed School** will remove the school from the School of Attendance drop down.



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News Items

News Items help get information to all users at once. News Items display on the homepage as Local News.

News Items can be shared with all users or just specific user levels.

- To add a News Item, click the **Add** button
- To activate an existing News Item, check the **In Rotation** checkbox
- To edit a News Item, click the **Edit** icon
- To delete a news item, click the **Delete** icon
- News items can be arranged by dragging and dropping into the desired order.

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Adding a News Item

Select which user levels should see the news item.

Add a **weblink**, if you want to direct users to a website.

Add a **graphic** that will grab user's attention.

Attachments can be added to news items.

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Document Library

The Document Library is the perfect place to upload documents that are specific to your SELPA or District.

Upload documents such as Parent Rights, Medi-Cal forms, Release of Information, Blank IEP forms, etc.

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Document Library

Adding/Managing Folders

- The first thing to do is create Folders. This is where documents will be placed.
- To add a Folder, click the **Manage Folders** button
- Enter the Folder name and select the user levels that should see this folder.

Adding a Document

- Click the **Add New Document** button
- Title the document
- Select the file
- Select a district (if you are SELPA level user) if only a specific district should see the document
- Select the folder it should be added to
- Select the User Levels that should see the document

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Custom Fields

Custom fields are a great way to track information that is not found on the Student Record.

Use custom fields for new school year projections, ESY information, dates IEPs were signed/returned, etc.

To **add** a custom field, click on the Student Record tab the field should be added to

Click the **Add New Custom Field** button

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Custom Fields

Select the **Field Type** that best fits the type of field you are adding

This could be a drop down, single line response, a date field, a checkbox, etc.

The field can be read-only for specific user levels or not display for specific user levels.

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Bulk Upload Enrollment Date

At the district level, users with the Can Bulk Upload Enrollment Date permission can bulk upload student Enrollment Dates from the SIS to SEIS.

This should be done yearly, to keep accurate record in SEIS of when the student enrolled in the district/LEA.

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Bulk Upload SSIDs

At the district level, users with the Can Upload SSID/District ID permission can bulk upload student SSID numbers from the SIS to SEIS.

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Bulk Upload District IDs

At the district level, users with the Can Upload SSID/District ID permission can bulk upload student District ID numbers from the SIS to SEIS.

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SEIS Help Desk

SEIS

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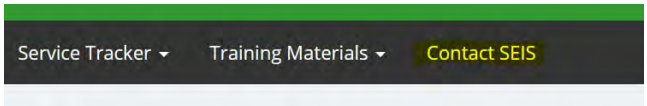
How to Contact the Help Desk

The SEIS Help Desk is available Monday – Friday 8:00am – 5:00pm.

Email the help desk though the Contact SEIS option. This gives the help desk information about your User Level, SELPA, District and computer.

Please be specific in your email. This will alleviate back and forth between you and the help desk.



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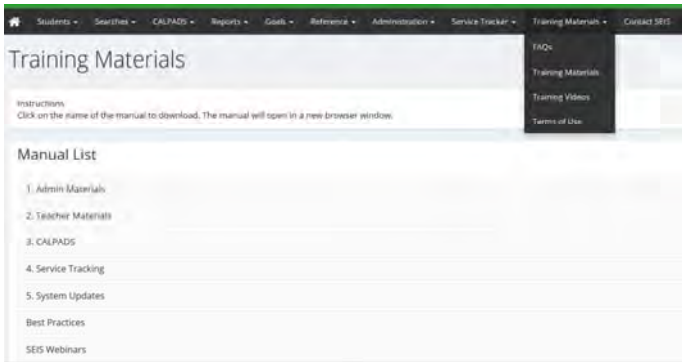
FAQs & Training Materials

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



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Daily Tasks

The Homepage notices need to be monitored DAILY.

Provider and Transfer requests need to be processed ASAP.

Communicate regularly with Case Managers who have overdue Plan Reviews, Eligibility Evaluations, and Initial Assessments.

Communicate regularly with Case Managers with Unaffirmed IEPs.

Post News Items to keep communication open.

Start compiling your Document Library.

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Thank You!

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

seisupport@sjcoe.net

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