

Introduction to: IEP Documentation Linkage

December 2020



IEP Documentation Linkage

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 - Admin Special Services Log
 - Special Services Log by Course
 - Special Services Log by Student
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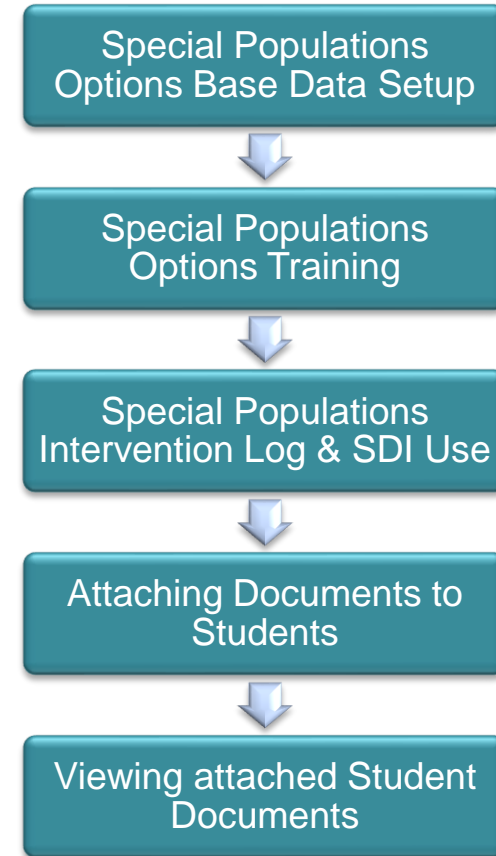
IEP Documentation Linkage

Overview

The Special Services Log functionality allows users to track all interactions and/or interventions for all students. The Special Services team can select specially designed instructions (SDI's) from a student's IEP and allow teachers to easily take note of any SDI's a student may have.

The Special Services Log functionality cannot be used until the required Special Services Base Data has been setup in ClassMate.

The IEP documentation linkage functionality is separate from the Special Population log. This functionality allows documentation to be linked to students and then viewed by Administration/Support Staff, and Teachers in key modules. Please ensure all base data has been setup & the proper modules have been assigned to the correct staff.



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Module Assignment

Administrative/Support Staff Modules

Category: Special Populations

- Student Special Pop Management (SPLPOP_M)

Category: Special Population Options

- Admin Special Services Log (ADPARA_M)
- Special Services Log by Course (PARALG_M)
- Special Services Log by Student (PARAST_M)

Teacher Module

Category: Teacher Discipline

- Student Contacts/SDI (TCONTC_M)



HELPFUL HINTS:

To attach documents to a student:

Assign **Student Special Pop management**

To view **ALL** documents attached to a student: (Administrators)

Assign **Admin Special Services Log**

To view documents meant for Staff: (Para-Educators)

Assign **Special Services Log by Course or Student**

To view documents meant for Teachers: (Teachers)

Assign **Student Contacts/SDI**



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Network Setup

Prior to linking any document(s) sites must create a centralized location within their network to be shared. The locally stored documents will then be available to users to attach document(s) to student(s) via a newly mapped drive.

Getting Started

1. A centralized shared repository must be setup on the local network. A folder or folder structure somewhere in the network must be setup and shared.
2. Copy **ALL**.pdf files to be attached to students in ClassMate and place within the shared folder structure.
3. A client connect to the share must be established on all clients that will either attach or view documents from that share. The share letter must be the same for all local users. For example, if the share is setup on one client as the I: drive, then all clients must have the share setup as the I: drive.
This can be any drive except C: M: V: or Z:
4. The drive designation that has been setup at a local site must be provided to ClassMate in order to allow for the necessary adjustments. These modifications will allow the shared drive, on the supplied designator, to be mapped. This mapped share will then be available as a browsing choice from within the ClassMate application.
5. This mapping will occur when a user logs into the ClassMate application.
6. **You can utilize NextCloud to sync your local network folder to ClassMate to allow for ease of document linking. Please contact Support if you require NextCloud credentials and visit our website for documentation on setup.**



IEP Documentation Linkage

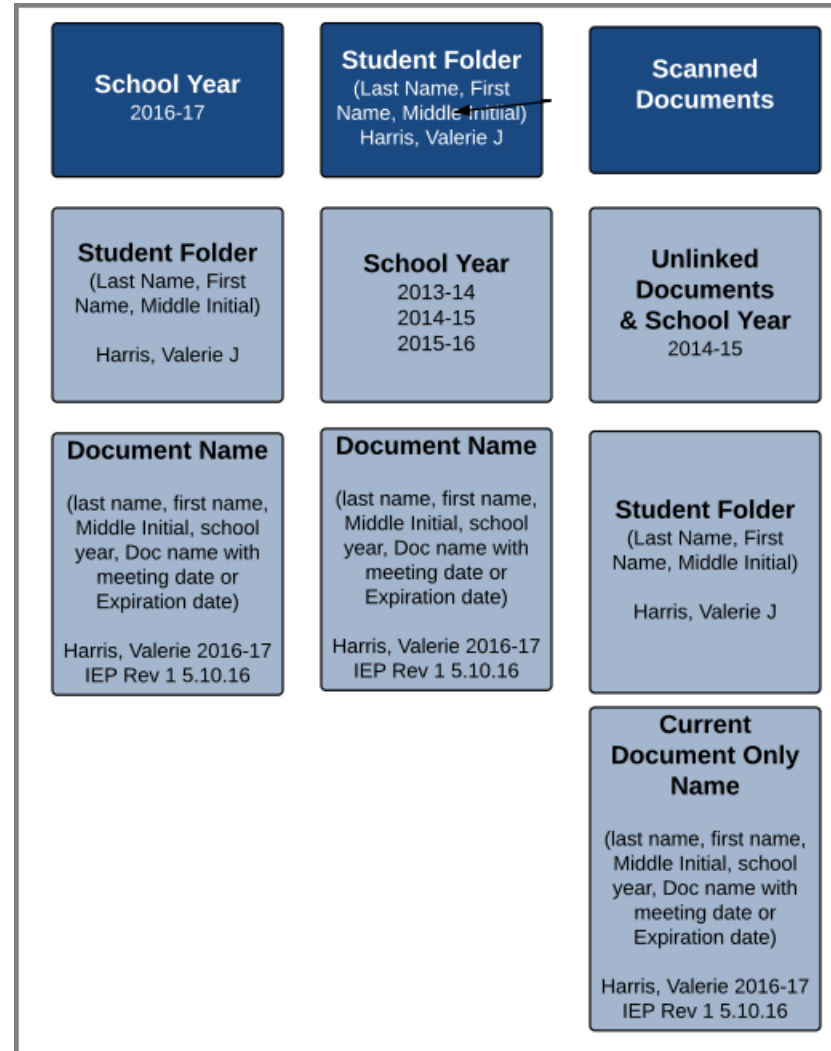


Best Practices: Network File Names

Prior to linking any document(s) sites must create a centralized location within their network to be shared. The locally stored documents will then be available to users to attach document(s) to student(s) via a newly mapped drive.

A file naming convention must be established and clearly communicated to staff that will be scanning, naming and linking the documents. A best practice is to mimic or recreate the filing structure you currently use outside of ClassMate. If you currently file documents by school year then create the top of the file structure by year.

A clear understanding of who, when and how files are linked, unlinked and archived must be created prior to any scanning and document linkage



Special Populations : Documentation Linkage

This module allows users the ability to link documentation to specific students. Documents such as IEP's, Standardized test scores, etc. These documents must be saved in PDF file format in order to be linked within ClassMate. The documents linked can then be viewed by specific staff. This functionality that should be limited to administrative or student services staff all students can be accessed from this module.

****NOTE****

Linked documents do NOT get purged at rollover and will remain with student until they graduate or roll out of system, unless manually removed.

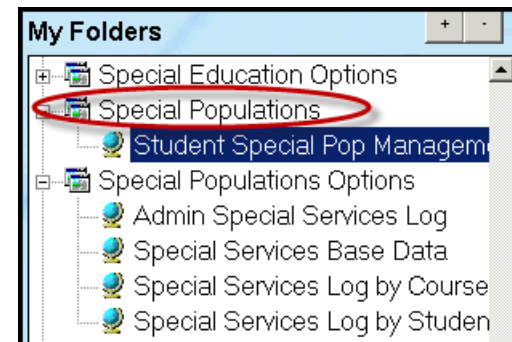
To link documentation to a student in the PDF file format :

Modules > Special Populations > Special Populations Management

Note: ONLY PDF documents can be attached in ClassMate

For detailed instruction setting up the base data or using the special services logs , please refer to the Special Services and Special Services Base Data guides available on our website at:

<http://www.classmate.net/classmate-user-state-documentation/>



IEP Documentation Linkage



Module Overview

Using the Student Special Pop Management module, Administrators have access to view all Special Population Students and all Regular Education Students. To select a student, choose the student's name on the left to view Special Populations information, Work Ethics, Knowledge, Skill, Referrals, MP Grades, Demographics, or student specific linked documentation. To view select the corresponding tab.

The screenshot displays the ClassMate AWS interface for a student named Brian Anderson. The interface includes a sidebar with a list of students, a main form for student details, and a table of IEP documents.

Student Information:

- Student ID: 020210575
- SSN: --
- Name: Brian Anderson
- State SecureID: 4444884383

IEP Documents Table:

Name	Staff Viewable	Teacher Viewable	Last Updated	Location	ID
IEP_7138843836	Y	Y	08/24/2020 8:58:13 PM	Z:\Documents\School Age IEP for Brian Archer (115460)_CTC_Final_L...	1247

Form Fields:

- File Location: [Text Field]
- Name: [Text Field]
- Staff Viewable:
- Teacher Viewable:



IEP Documentation Linkage

Special Populations : Documentation Linkage

- 1 Select the **Location** from the dropdown menu. If you do not have multiple locations, ClassMate will default to the single location.
- 2 Select the **Student** by clicking on the Student name
- 3 Select the **IEP Documents Tab**. This tab name can be customized.
- 4 Browse to the file location you would like to link by clicking the **BROWSE** button
- 5 Enter a **Document Name**
- 6 Select viewing properties.

None Selected	Administrators ONLY
Staff Viewable:	Para-Educators
Teacher Viewable:	Teachers
- 7 Add the document by Clicking the **ADD DOC** button



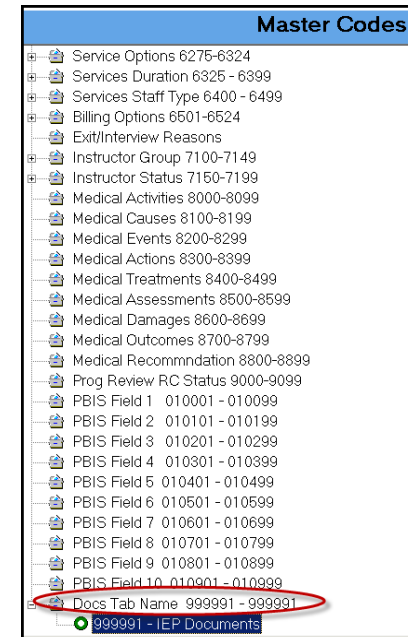
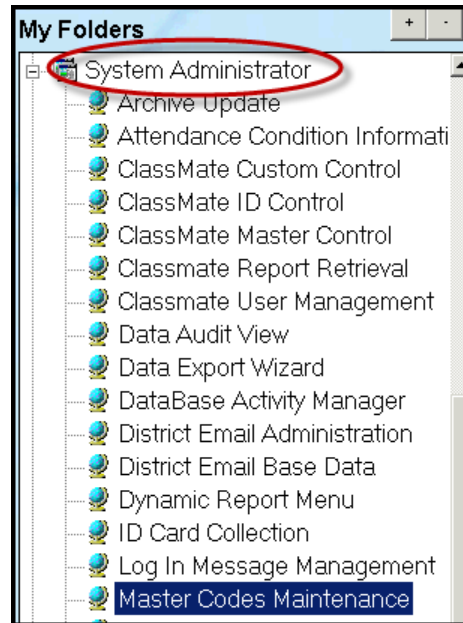
IEP Documentation Linkage

Special Populations: Customizing the Document Tab

This module allows users the ability to customize the name of the documents Tab found in the Special Populations options modules. The name created here will display across **ALL** Special Populations options modules.

Double Click **Modules** > Double click **System Administrator** > Click **Master Codes Maintenance**

Scroll to the **Docs Tab Name** (999991-999991)



IEP Documentation Linkage

Special Populations : Customizing the Document Tab

- 1 Select the **Docs Tab Name** from the listing. Click the 999991-IEP Documents entry or whatever previously customized name is displaying.
- 2 Enter new tab name in the **Description** field
- 3 Click the “Save “ icon.



ID:

Description:

2

Note: ALL tabs in the Special Populations Options modules will display the customization.



IEP Documentation Linkage

Special Populations : Viewing Student Documents

After the documents have been linked, administrators, staff and teachers will have **“View Only”** access to the documents. The modules used to view the documents will vary by staff type.

View Documents in:

Administrators:

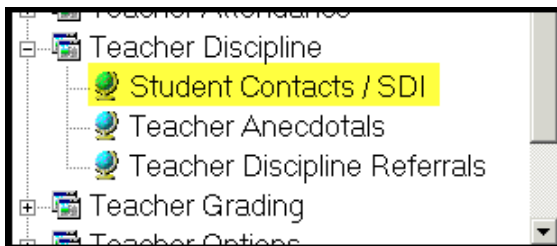
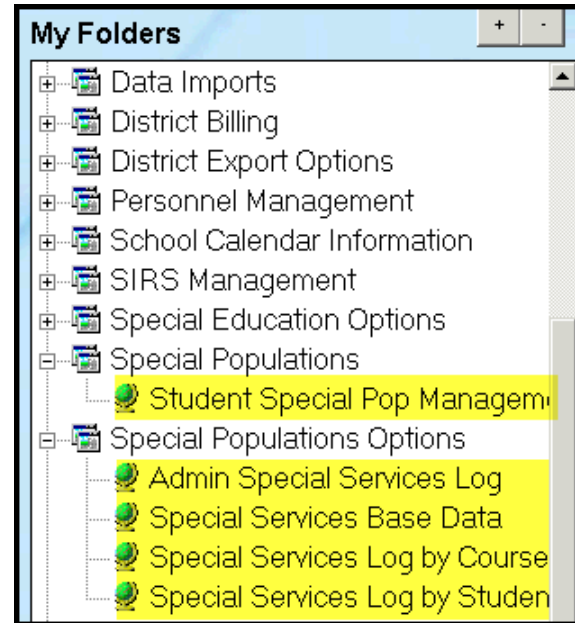
- Admin Special Services Log
- Student Special Populations Management

Staff:

- Special Services Log by Course
- Special Services Log by Student

Teachers:

- Student Contacts/SDI's
- **Teacher Web > Student Snapshot > Documents



IEP Documentation Linkage

Special Populations : Viewing Student Documents - *Administrators*

After the documents have been linked, administrators, staff and teachers will have “**View Only**” access to the documents. The modules used to view the documents will vary by staff type.

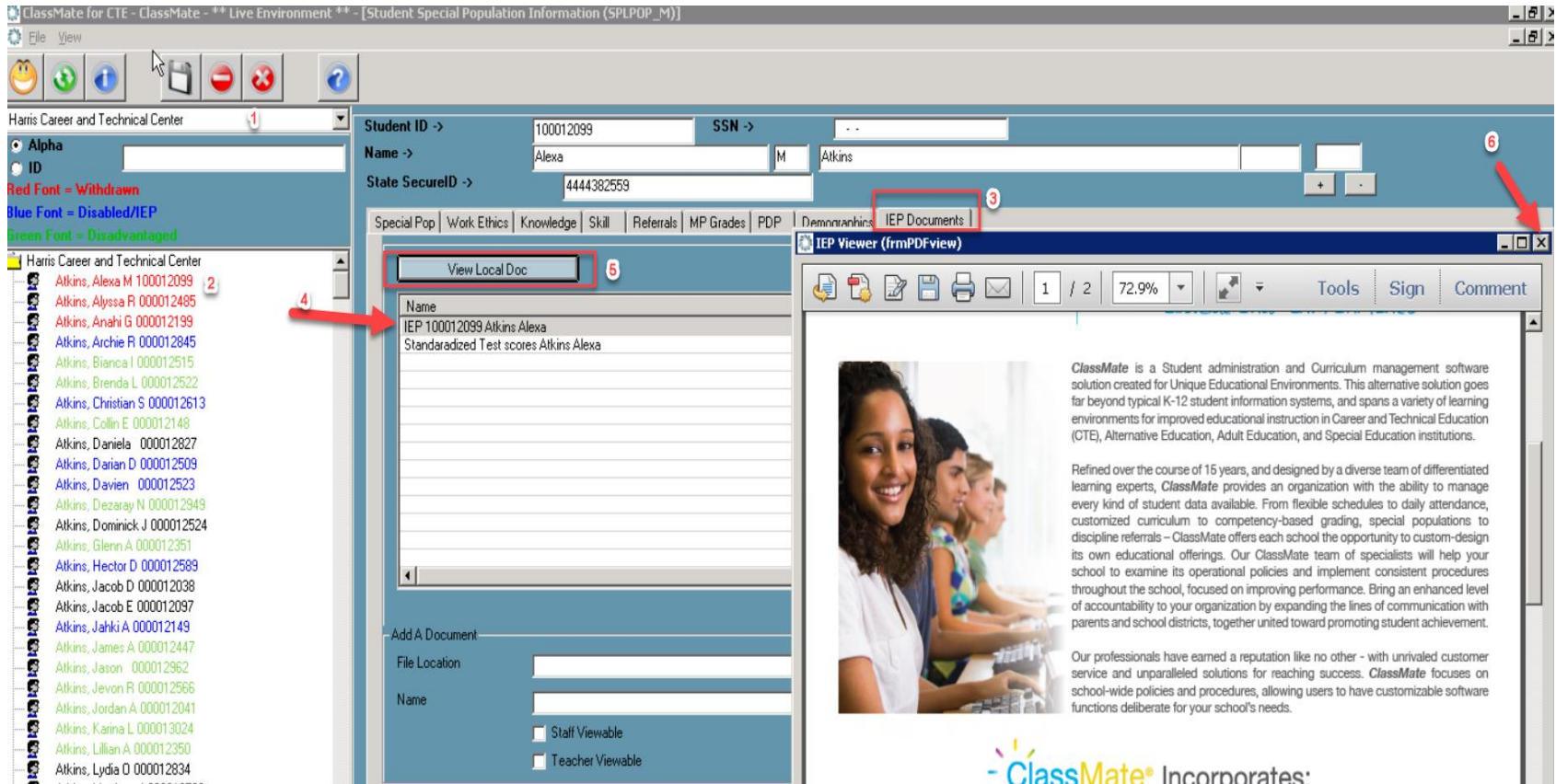
Administrator Views: Admin Special Services Log Student Special Populations Mgmt

- 1 Select the **Location** from the dropdown menu. If you do not have multiple locations, ClassMate will default to the single location.
- 2 Select the **Student** by clicking on the Student name. Administrators will see all students.
- 3 Select the **IEP Documentation Tab**
- 4 Select the **Document** you would like to view by clicking on the name.
- 5 Click the **View Local Doc** button.
- 6 The selected document will display on the screen. Click the “**X**” in the corner of the document window to close.



IEP Documentation Linkage

Special Populations : Viewing Student Documents – Administrators



The screenshot displays the ClassMate software interface for viewing student documents. The main window shows a list of students on the left and a detailed view of a selected student on the right. The student's information includes Student ID (100012099), Name (Alexa), and State SecureID (4444382558). The 'IEP Documents' tab is selected, and a 'View Local Doc' button is highlighted with a red box and the number 5. A red arrow points to the 'View Local Doc' button. The 'IEP Viewer (frmPDFview)' window is open, displaying a document with a photo of a student and text describing ClassMate's capabilities. The document text includes: "ClassMate is a Student administration and Curriculum management software solution created for Unique Educational Environments. This alternative solution goes far beyond typical K-12 student information systems, and spans a variety of learning environments for improved educational instruction in Career and Technical Education (CTE), Alternative Education, Adult Education, and Special Education institutions." and "Refined over the course of 15 years, and designed by a diverse team of differentiated learning experts, ClassMate provides an organization with the ability to manage every kind of student data available. From flexible schedules to daily attendance, customized curriculum to competency-based grading, special populations to discipline referrals – ClassMate offers each school the opportunity to custom-design its own educational offerings. Our ClassMate team of specialists will help your school to examine its operational policies and implement consistent procedures throughout the school, focused on improving performance. Bring an enhanced level of accountability to your organization by expanding the lines of communication with parents and school districts, together united toward promoting student achievement." and "Our professionals have earned a reputation like no other - with unrivaled customer service and unparalleled solutions for reaching success. ClassMate focuses on school-wide policies and procedures, allowing users to have customizable software functions deliberate for your school's needs."

IEP Documentation Linkage



Special Populations : Viewing Student Documents - Staff

The screenshot displays the ClassMate software interface for viewing student documents. The main window is titled "ClassMate for CTE - ClassMate - ** Live Environment ** - [Student Special Population Information (SPLPOP_M)]". The interface includes a menu bar (File, View), a toolbar, and a sidebar with a tree view of the school structure. The main content area shows student information for "Alexa Atkins" (Student ID: 100012099, SSN: 4444382559) and a list of documents under the "IEP Documents" tab. A "View Local Doc" button is highlighted with a red box and a red arrow labeled "5". The document list includes "IEP 100012099 Atkins Alexa" and "Standardized Test scores Atkins Alexa". A red arrow labeled "4" points to the student's name in the list. A red arrow labeled "6" points to the "IEP Documents" tab. A red arrow labeled "3" points to the "IEP Documents" tab in the top navigation bar. A red arrow labeled "2" points to the student's name in the sidebar tree view. A red arrow labeled "1" points to the school name in the top left corner. An "IEP Viewer (IrmPDFview)" window is open in the foreground, displaying a document with a photo of students and text about ClassMate. The document text includes: "ClassMate is a Student administration and Curriculum management software solution created for Unique Educational Environments. This alternative solution goes far beyond typical K-12 student information systems, and spans a variety of learning environments for improved educational instruction in Career and Technical Education (CTE), Alternative Education, Adult Education, and Special Education institutions." and "Refined over the course of 15 years, and designed by a diverse team of differentiated learning experts, ClassMate provides an organization with the ability to manage every kind of student data available. From flexible schedules to daily attendance, customized curriculum to competency-based grading, special populations to discipline referrals - ClassMate offers each school the opportunity to custom-design its own educational offerings. Our ClassMate team of specialists will help your school to examine its operational policies and implement consistent procedures throughout the school, focused on improving performance. Bring an enhanced level of accountability to your organization by expanding the lines of communication with parents and school districts, together united toward promoting student achievement." and "Our professionals have earned a reputation like no other - with unrivaled customer service and unparalleled solutions for reaching success. ClassMate focuses on school-wide policies and procedures, allowing users to have customizable software functions deliberate for your school's needs." The ClassMate logo is visible at the bottom of the viewer window.



IEP Documentation Linkage

Special Populations : Viewing Student Documents - *Teachers*

Teacher Views: Student Contacts/SDI's

- 1 Select the **Student** by clicking on the Student name.
Teachers will only have access to documents identified as teacher accessible.

Notice the color key indicating students are flagged as:

Disabled/IEP

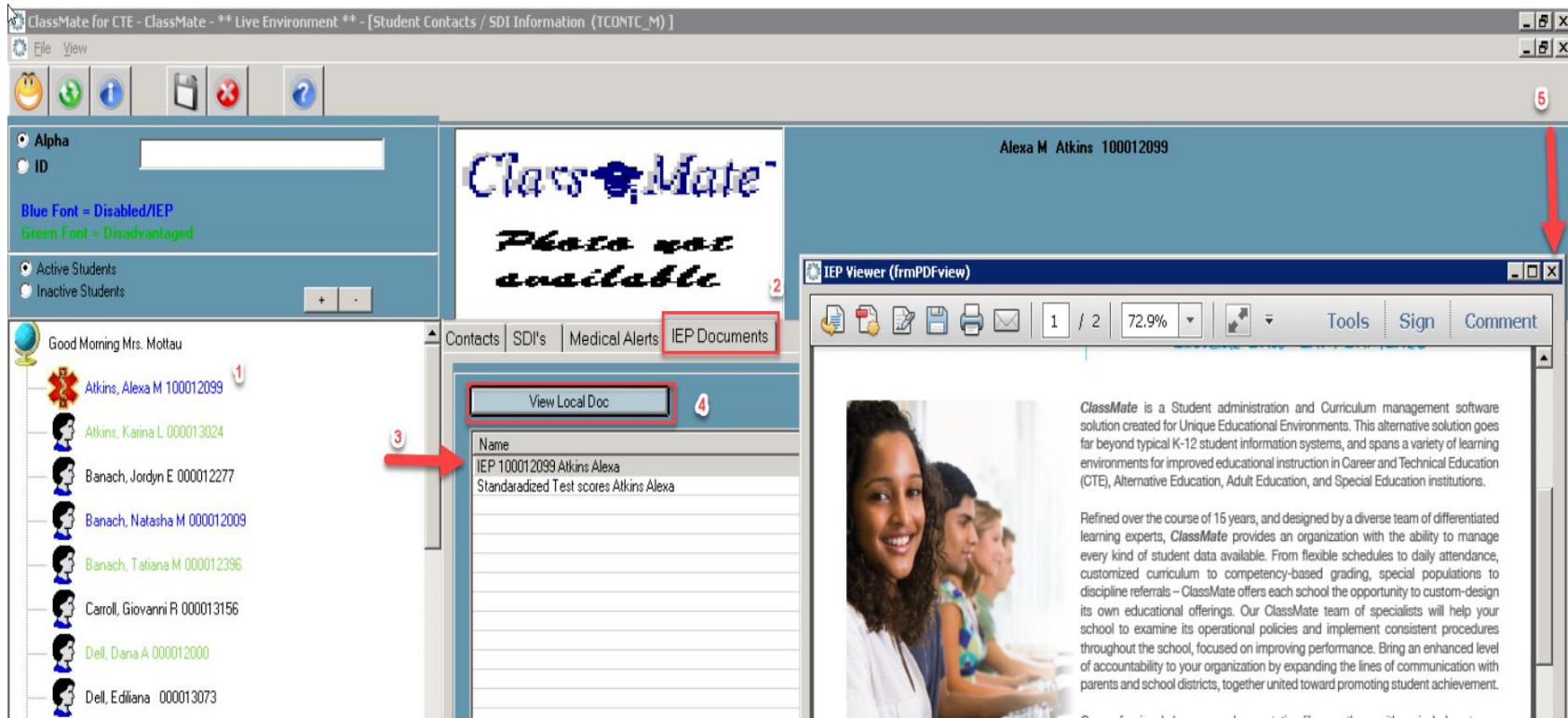
Disadvantaged

- 2 Select the **IEP Documents Tab**
- 3 Select the **Document** you would like to view by clicking on the name. Only those documents with identified with as staff viewable will display.
- 4 Click the **View Local Doc** button.
- 5 The selected document will display on the screen. Click the **"X"** in the corner of the document window to close.



IEP Documentation Linkage

Special Populations : Viewing Student Documents - Teachers



The screenshot displays the ClassMate software interface. On the left, a sidebar lists students, with 'Atkins, Alexa M 100012099' highlighted. A red arrow labeled '3' points to this student's name. The main window shows the 'IEP Documents' tab selected, with a 'View Local Doc' button highlighted by a red box and labeled '4'. A red arrow labeled '2' points to the 'Photo not available' message. A red arrow labeled '5' points to the top right corner of the main window. An 'IEP Viewer (frmPDF-view)' window is open, displaying a document with a photo of students and text describing ClassMate's features.

ClassMate for CTE - ClassMate - ** Live Environment ** - [Student Contacts / SDI Information (TCONTC_M)]

File View

Alpha

ID

Blue Font = Disabled/IEP
Green Font = Disadvantaged

Active Students
Inactive Students

Good Morning Mrs. Mottau

Atkins, Alexa M 100012099

Atkins, Karina L 000013024

Banach, Jordyn E 000012277

Banach, Natasha M 000012009

Banach, Tatiana M 000012396

Carroll, Giovanni R 000013156

Dell, Dana A 000012000

Dell, Edliana 000013073

Contacts SDI's Medical Alerts IEP Documents

View Local Doc

Name
IEP 100012099 Atkins Alexa
Standardized Test scores Atkins Alexa

IEP Viewer (frmPDF-view)

1 / 2 72.9%

Tools Sign Comment

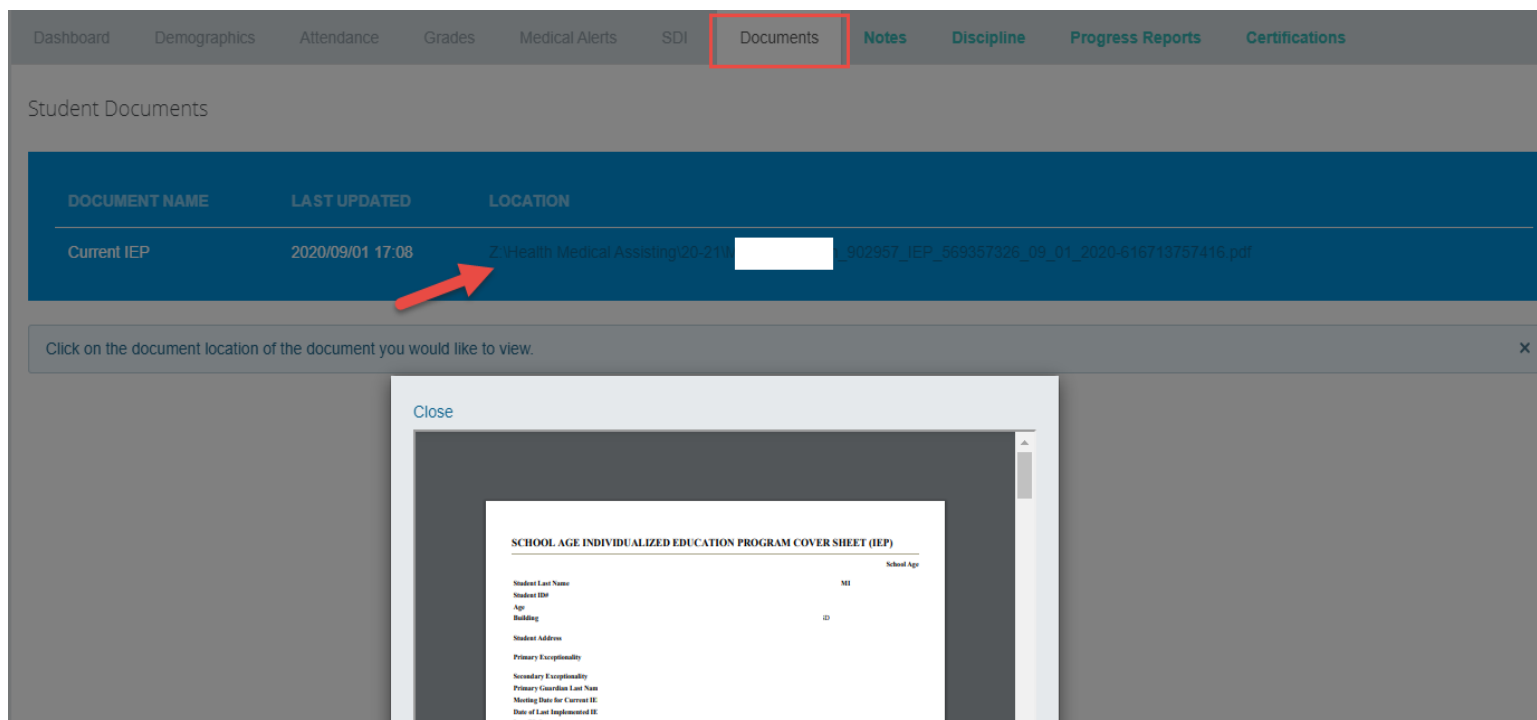
ClassMate is a Student administration and Curriculum management software solution created for Unique Educational Environments. This alternative solution goes far beyond typical K-12 student information systems, and spans a variety of learning environments for improved educational instruction in Career and Technical Education (CTE), Alternative Education, Adult Education, and Special Education institutions.

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IEP Documentation Linkage

Special Populations : Viewing Student Documents – Teacher Web

- * Select Student Name to open Student Snapshot
- * Select Documents tab
- * Click on named document under Location to display linked document
- * The selected document will display on the screen. Click the “X” in the corner of the document window to close.



The screenshot shows the 'Documents' tab selected in the top navigation bar. Below the navigation bar, the 'Student Documents' section contains a table with the following data:

DOCUMENT NAME	LAST UPDATED	LOCATION
Current IEP	2020/09/01 17:08	Z:\Health Medical Assisting\20-21\ [redacted] 902957_IEP_569357326_09_01_2020-616713757416.pdf

A red arrow points to the 'LOCATION' column. Below the table, a message box says 'Click on the document location of the document you would like to view.' An 'X' icon is in the top right corner of this message box. A document viewer window is open, displaying a 'SCHOOL AGE INDIVIDUALIZED EDUCATION PROGRAM COVER SHEET (IEP)' form. The form includes fields for Student Last Name, Student ID#, Age, Building, Student Address, Primary Exceptionality, Secondary Exceptionality, Primary Goal/IEP Last Name, Meeting Date for Current IEP, Date of Last Implemented IEP, and Last IEP Date. A 'Close' button is visible in the top left corner of the document viewer window.

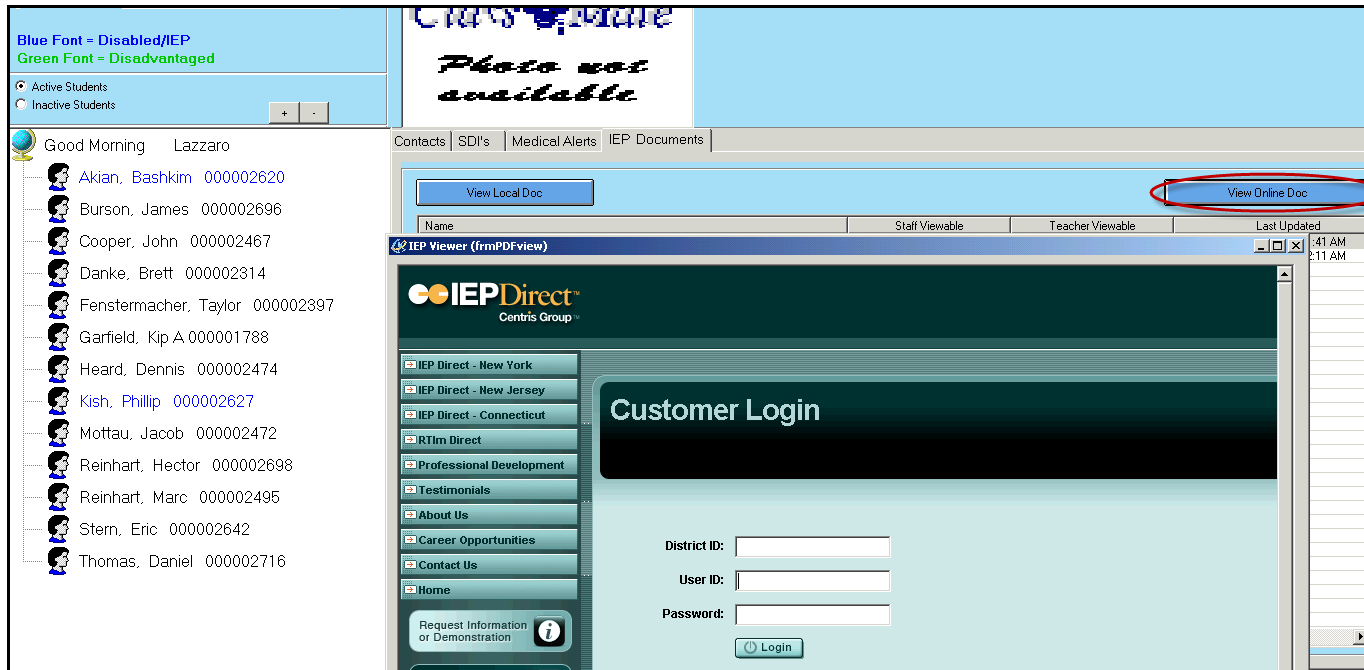


IEP Documentation Linkage

Special Populations : Viewing Online Student Documents (NY ONLY)

The ClassMate IEP Documentation Linkage functionality allows NY State user the ability to access IEP Direct login from within ClassMate.

All modules containing the **View Local Doc** also contain the **View Online Doc** functionality.



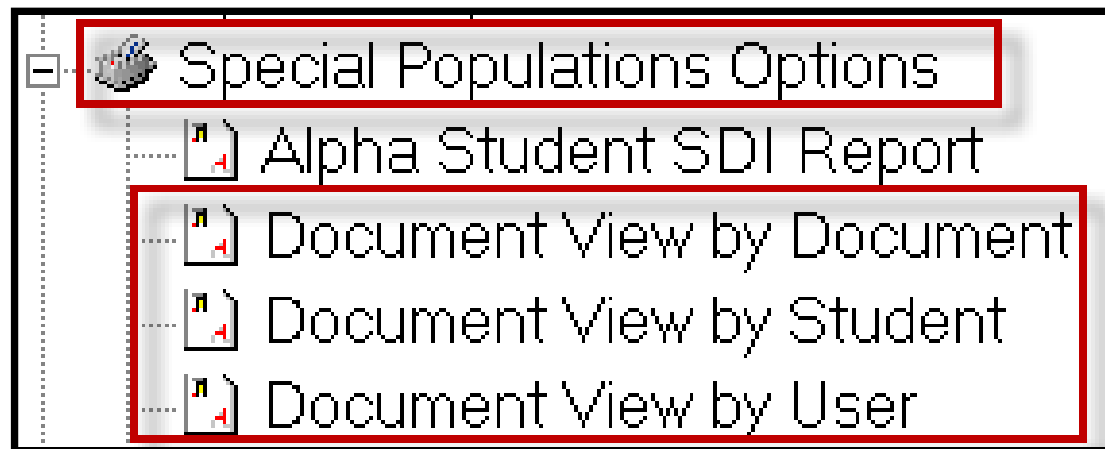
The screenshot displays the ClassMate IEP Documentation Linkage interface. On the left, a sidebar lists students with their names and IDs, including Akian, Bashkim (000002620) and others. The main area shows a 'Photo not available' message and a 'View Local Doc' button. A red circle highlights the 'View Online Doc' button. Below this, the IEP Viewer (fromPDFview) window is open, displaying the IEP Direct Customer Login page. The login page includes fields for District ID, User ID, and Password, along with a 'Login' button. The IEP Direct logo and navigation menu are also visible.



IEP Documentation Linkage

Document View Reports

- Currently within ClassMate there are three reports that can be utilized to show who has been viewing the documents that have been linked to students.
- To access these reports go to: **Reports > Special Population Options**
- Reports are titled: Document View by Student, Document View by User, and Document View by Document.



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