

Special Ed Preferences

Last Modified on 05/13/2025 8:59 am CDT

Special Education Preferences | Document Wizard Descriptions | Set Special Education Preferences

Tool Search: Special Ed Preferences

Special Education Preferences are separate from overall System Preferences. Special Education preferences need to be created to send process alert messages and assign rules.

| references | | |
|---|-------|-------------------------------------|
| Save | | |
| District Special Education Preferences | - | |
| Jse School Scope for SPED Staff/Advisors/Service Providers/Evaluators | No V | |
| Enable Team Member List to Populate from Classroom Teachers | Yes V | |
| Days Between a Locked Evaluation and a New Locked IEP Starting | 1 | Calendar Days V |
| Days Between a Locked Evaluation Consent Date and Evaluation Date | | Calendar Days 🔻 |
| Days Between a Locked Evaluation Consent Date and Evaluation Determination Date | 3 | Calendar Days 🔻 |
| Auto Create a PDF when Amend Tool is used | No 🔻 | Inactive as of 02/12/2019 13:18:19. |
| nclude a DRAFT watermark on all Plans until the Plan is locked | No 🔻 | Inactive as of 02/12/2019 13:18:19. |
| nclude a DRAFT watermark on all Evaluations until the Evaluation is locked | No 🔻 | |
| Auto End Date the previous locked Plan when a new Plan is locked with overlapping dates | Yes V | Active as of 02/12/2019 13:18:19. |
| Auto End Date any Services with an End Date that overlaps the new Plan | No 🔻 | Inactive as of 02/12/2019 13:18:19. |
| Document Wizard Description: | | |
| Evaluation: Restore Default Evaluation Description Initial Referral, Determination of Disability, Re-Evaluations and Notice of Evaluation | | |
| Initial Referral, Determination of Disability, Re-Evaluations and Notice of Evaluation | | |
| Plan: Restore Default Plan Description | | |
| Goals and Objectives, Services, Accommodations, Transition, and Other Information | | |
| Progress Report: Restore Default Progress Report Description | | |
| Report measurable progress against ongoing Plan Goals | | |
| Custom Form: Restore Default Custom Form Description | | |
| Notices, checklists, and supplemental forms | | |

Special Ed Preferences

See the Special Ed Preferences Tool Rights article for information on the tool rights needed for this tool.

Special Education Preferences

| ScopeMaAdvisors/ServiceScProviders/SPEDallStaffindinwh | etting the preference to Yes limits the options in the Team lembers dropdown to staff with a District Assignment at the chool of the student's current enrollment. If set to No, this llows any staff member with Special Ed, Advisor, or Counselor adication marked on an active District Assignment to appear the Team Member drop-lists regardless of the school to which they are assigned. This preference applies to the Counseling and PLP modules. | Yes or No |
|--|--|---------------------------------------|
| | | |
| Enchle Team Co | | No. or |
| | election indicates classroom teachers are populated from the eam Member list. | Yes or No |
| Locked th Evaluation and a | nter the number days for the district. This option is used in ne System Preferences Process Alerts process, which displays red exclamation mark alert on the Special Ed Documents pol. | ss, which displays Days or |
| | This setting does not interact with the Special Ed Process Alerts tool. | |
| LockedthEvaluationaConsent Datetoand EvaluationaDatea | nter the number of days for the district. This option is used in the System Preferences Process Alerts process, which displays red exclamation mark alert on the Special Ed Documents pol. This setting does not interact with the Special Ed Process Alerts tool. | School Days or Calendar Days |



| Preference | Description | Options | | |
|--|---|---------------------------------------|--|--|
| Days Between a Locked Evaluation Consent Date and Evaluation Determination Date | Enter the number of days for the district. This option is used in the System Preferences Process Alerts process, which displays a red exclamation mark alert on the Special Ed Documents tool. This setting does not interact with the Special Ed Process Alerts tool. | School Days or Calendar Days | | |
| Auto Create a PDF when Amend Tool is used | Selection indicates a PDF copy of the original document, prior to it being amended, is created and stored. The PDF copy is stored within the Uploaded Forms folder on the Documents List in the Calendar Year matching the date the PDF copy was created. | Yes or No | | |
| Include a DRAFT watermark on all Plans until the Plan is locked | c onPlans until the Plan is locked. This value defaults to No.No.ntil | | | |
| Include a DRAFT watermark on all Evaluations until the Evaluation is locked | Selection indicates a Draft watermark is added to all unlocked Evaluations until the Evaluation is locked. This value defaults to No. | Yes or No | | |
| Auto End Date the previous locked Plan when a new Plan is locked with overlapping dates | Selection will automatically end date the previous locked plan when a new plan is locked with overlapping dates. | Yes or No | | |



| Preference Description | Options |
|---|-----------------|
| Auto End Date Selection will automatically end date any services with an end any Services date that overlaps the new locked Plan. with an End Date that Date that overlaps the new Plan Only available when previous option is marked | nd Yes or No |

Calendar days include weekends and non-instructional days. School days only count days that are designated for instruction.

Document Wizard Descriptions

Text entered in the **Evaluation, Plan, Progress Report,** or **Custom Form** fields displays when creating a new document on the student's Documents tool. The text in the image below is default text. Remove this text and retype to meet specific district needs. To restore the default text, click the **Restore Default Description** buttons for the appropriate area.

| Summary | Team Members | Documents | Contact Log | |
|------------------------------|---|-------------------------|---------------------------------|---|
| | | | | |
| Create New | Document Wizard | | | |
| Please | select one of the following (| documents: | | |
| | New Evaluation: eferral, Determination of Di | isability, Re-Evaluatio | ns and Notice of Evaluation | |
| | New Plan: nd Objectives, Services, Ad | ccommodations, Tran | sition, and Other Information | |
| | New Progress Report: measurable progress again | nst ongoing Plan Goa | 's | |
| Notices, | Custom Form: checklists, and supplemer Form | | nk to an Enrollment | |
| Studen | t Eligibility Form | ▼ 1 | 7-18 Harrison High(07/03/2017-) | ۲ |
| DOCUN | IENT SELECTED FOR CR | REATION: Student El | gibility Form | |
| | note certain fields will auto- | populate based on th | e students record. | |
| | Crea | ate Document | Cancel | |
| | | | | _ |

Infinite 🔿 🦯

Existing text will display unless a user removes this text or alters the text.

Set Special Education Preferences

- 1. Select either Yes or No from the dropdown for the behavior of **School Scope** preference.
- 2. Select either Yes or No from the dropdown for the **Classroom Teacher** population preference.
- 3. Enter a value for the following preferences and determine for each option if the value is for **School Days** or for **Calendar Days**.
 - Days Between a Locked Evaluation and a New Locked IEP Starting
 - Days Between a Locked Evaluation Consent Date and Evaluation Date
 - Days Between a Locked Evaluation Consent Date and Evaluation Determination Date.
- 4. Select either Yes or No from the dropdown for the **Auto Create a PDF** preference.
- 5. Select either Yes or No from the dropdown for the **DRAFT watermark** preference for both Plans and Evaluations.
- 6. Select either Yes or No from the dropdown for the **Auto End Date Plan** preference.
 - If Yes is selected for step 6, select either Yes or No from the dropdown for the Auto End Date Services preference.
- 7. Enter the desired text for the description that displays for each type of document that can be created for a student.
- 8. Click the **Save** button when finished. Special Education Preferences are now set.