

# **Special Ed Documents on Portal**

Last Modified on 10/21/2024 8:20 am CDT

Draft Plans | Edit Draft Plans | Lock Draft Plans | Other Locked Special Ed Documents

Tool Search: Special Ed Documents

Special Ed Documents can be set up to allow parents/guardians and students to view the student's Plan(s), Evaluation(s), Progress Report(s), and Prior Written Notice(s) (Ohio only) on the Campus Parent and Campus Student Portal. Nevada users have additional Portal functionality for electronically signing plans.

### **Draft Plans**

The following conditions must happen in order for draft Plans to display on Portal:

Step	Image <i>Click to Enlarge</i>
Tool Search: Display Options	Portal Display Options 🔶 System Settings - Portal Poleneous - Portal -
1. The Portal Preferences, <b>Special Education</b> <b>Plan</b> AND <b>Draft Special Ed Plans</b> , are marked.	Construction     C
Note: Portal preferences are set by school. See the Portal Preferences Display Options documentation for additional information.	Addem Rogens  The Rogens Addem
	Draft Special Education Plan Portal Preference



### Step

### Image *Click to Enlarge*

Tool Search: User Account

2. The user has the **R**ead right to the **Publish Draft to Portal** tool right.

Student Information > Special Ed > General > Documents > Plan > Publish Draft to Portal

- Samuela M 🔳 DOB:						
Iser Tool Rights Editor						
<ul> <li>Special Ed</li> </ul>	🖃 All	Read	Write	🗖 Add	Delete	
Special Ed Caseload		Read	Write	🗌 Add	Delete	
Special Ed Contact Log		Read	Write	D Add	Delete	
Access to Records Created By Other Users		Read	Write	Add	Delete	
Special Ed Documents		🗹 Read	Write	D Add	Delete	
Plan		Read	Write	Add	Delete	
Lock		Read	Write	Add	Delete	
Unlock		Read	Write	Add	Delete	
Amend Plan		Read	Write	Add	Delete	
Copy		Read	Write	Add	Delete	
Document Sections		Read	Write	Add	Delete	
Publish Draft to Portal	🗹 All	🗹 Read	🗹 Write	🗹 Add	Delete	
Evaluation	LI All	Read	U Write	🗌 Add	Delete	
Lock	🗆 All	Read	Write	🗆 Add	Delete	
Unlock	🗆 All	Read	Write	Add	Delete	
Copy		Read	Write	🗌 Add	Delete	
Document Sections	🗆 All	Read	Write	🗌 Add	Delete	
Progress Report	🗌 All	Read	Write	🗌 Add	Delete	
Lock	🗌 All	Read	Write	🗌 Add	Delete	
Unlock	🗆 All	Read	Write	🗌 Add	Delete	
Custom Forms	🗆 All	Read	Write	Add	Delete	
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Publish Draft to Portal Tool Right

Tool Search: Special Ed Documents > Publish/Remove Draft

3. The user publishes the draft plan by clicking the **Publish/Remove Draft** button on the Special Ed Documents tool.

A warning displays: "This document is unlocked and will be sent to Portal with the draft watermark on each page." Click Ok to publish or Cancel to go back. 

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 ▲ Lock/Unlock
 Copy
 Amend
 Delete
 Print

 New Document
 ▲ Upload Document
 ♥ Publish/Remove Draft

 Documents
 Lock/Unlock
 ♥ Publish/Remove Draft

 Documents
 Lock/Unlock
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 Documents
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 Documents
 Etal
 ● Plans (3)

 Campus Dofault IEP (With PLAAFP) (01/16/2021-01/15/2022) (Copied 1)
 ● Campus Default IEP (With PLAAFP) (01/16/2021-01/14/2021) (Copied Original)

 ⊕ ⊕ 2019-2020 (1)
 ● ⊕ 2019-2020 (1)

 ⊕ ⊕ 2019-2020 (1)
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 ● ⊕ 2019-2021 (1)

 ⊕ ⊕ 2019-2021 (1)
 ● ⊕ 2019-2021 (1)

Publish/Remove Draft Button

Tool Search: Special Ed Documents > Document Detail Detail

4. The Document Detail indicates that the plan "Draft Published." A paper and checkmark icon displays next to the plan name on the Documents list. 
 Document Detail

 Portal: Draft Published 05/26/2021 12:42:23

 Locked: No
 Type:

 Date: 01/25/2021 - 01/24/2022

 Created Date: 05/26/2021 12:31:16
 Created By: Administrator, Demo

 Last Modified Date: 05/26/2021 12:42:22
 Modified By: Administrator, Demo

Draft Published Document Detail



#### Step Image **Click to Enlarge** Tool Search: Portal > Documents > Special Documents Education 20.21 Harris Special Education Campus Default IEP (With PLAAFP) (Draft) 01/25/2021 - 01/24/2022 Campus Default IEP (With PLAAFP 01/16/2021 - 01/15/2022 5. The Parent/Guardian and Student will see the Campus Default IEP (With PLAAFP) 01/16/2020 - 01/14/2021 Plan with "Draft" in the name of the Plan and a Draft watermark when they select the Transcript document. Draft Plan = plan.fop 1 / 6 | - 95% + | 🕃 🕎 ± e : Campus IEP Page 1 Individualized Education Program Plainview Schools 123 Main Street Metro City, MN 55555 (763)555-5555 Stu DOB: 09/15/2003 Student Number: 171900001 lent Name: Dylan Victor Abegg 4321 109th Ave NE District of Residence: Grade: 11 Gender: M Race (Ethnicity Code): Hispanic Guardian Information Work Phone Cell Phone (763)555-0198 Relationship to Studen Father itecampus Home Phone (763)555-0199 Abegg, Millie MN 55445 Cell Phone (763)555-0197 itreet Address, City, State, Zip 1321 109th Ave NE Blaine, MN 55449 Home Phone (763)555-0199 rent's/Guardian's Name Cell Phone Ruger, Maria Street Address, City, State, Zip 9876 Maple Street Blaine, MN 55449 Plan Information Start Date: 01/25/2021 End Date: 01/24/2022 Evaluation Date: 10/09/2013 Meeting Date: 01/11/2021 Draft Watermark Plan

# **Edit Draft Plans**

If a Plan has been sent to the Portal and changes need to be made, it must be removed from the Portal first:

Step	Image
	Click to Enlarge



Step	Image <i>Click to Enlarge</i>
<ol> <li>Select the Draft Plan and click <b>Publish/Remove Draft.</b></li> <li>A warning displays: "This document is already displayed on Portal. Selecting Ok will remove it from Portal."</li> </ol>	Image: Control of the second secon
2. The Document Detail indicates that the plan "Draft Removed." A paper icon displays next to the plan name on the Documents list.	Document Detail         Portal: Draft Removed 05/26/2021 13:45:26         Locked: No       Type:         Date: 01/25/2021 - 01/24/2022         Created Date: 05/26/2021 12:31:16       Created By: Administrator, Demo         Last Modified Date: 05/26/2021 13:45:25       Modified By: Administrator, Demo

# Lock Draft Plans

If a user would like to lock a plan that has been sent to Portal:



Step	Image <i>Click to Enlarge</i>
<ol> <li>Select the Plan, then click         Lock/Unlock.     </li> <li>A warning displays: "A draft document is currently on Portal. Locking this document will replace the draft document with this locked one.     </li> <li>You will not be able to make additional changes unless you have Unlock Rights. Click OK to proceed or Cancel to go back."</li> </ol>	Open       Lock/Unlock       Copy       Amend       Delete       Print         New Document       Image: Deleta Document       Publish/Remove Draft         Deleta       Plans (3)       Plans (3)         Plans (3)       Plans (3)       Plans (3)         Campus Default IEP (With PLAAFP) (01/15/2022) (Copied 1)       Copied Original)         Campus Default IEP (With PLAAFP) (01/16/2020-01/14/2021) (Copied Original)       Copied Original)         Campus Default IEP (With PLAAFP) (01/16/2020-01/14/2021) (Copied Original)       Copied Original)         Campus Default IEP (With PLAAFP) (01/16/2020-01/14/2021) (Copied Original)       Copied Original)         Campus Default IEP (With PLAAFP) (01/16/2020-01/14/2021) (Copied Original)       Copied Original)         Campus Default IEP (With PLAAFP) (01/16/2020-01/14/2021) (Copied Original)       Copied Original)         Campus Default IEP (With PLAAFP) (01/16/2020-01/14/2021) (Copied Original)       Copied Original)         Campus Default IEP (With PLAAFP) (01/16/2020-01/14/2021) (Copied Original)       Copied Original)         Campus Default IEP (With PLAAFP)       Copied Original)       Copied Original)         Campus Default IEP (With PLAAFP)       Copied Original)       Copied Original)         Campus Default IEP (With PLAAFP)       Copied Original)       Copied Original)         Campus Default IEP (With PLAAFP)       Copied O
2. The Document Detail indicates that the plan is "Locked Published." A padlock icon displays next to the plan name on the Documents list.	Document Detail         Portal: Locked Published 05/26/2021 13:49:35         Locked: Yes       Type:         Date: 01/25/2021 - 01/24/2022         Created Date: 05/26/2021 12:31:16       Created By: Administrator, Demo         Last Modified Date: 05/26/2021 13:49:35       Modified By: Administrator, Demo         Locked: Published Document Detail

## **Other Locked Special Ed Documents**

The following conditions must happen in order for a locked Special Ed documents to display on Portal:

Step	Image <i>Click to Enlarge</i>
Tool Search: Portal Display Options	Portial Display Cyticins. 8 Branch Nerror II Ford Millionen II For
1. <b>For Plans</b> : the Portal Preference, Special Education Plan, is marked.	All contractions of the second sec



### Step

Tool Search: Portal Display Options

2. For Evaluations, Progress Reports, and Prior Written Notices (OH Only): the Portal Preference, Special Education Other Documents, is marked.

	,	System Settings > Portal Preferences > Portal Displ
	y Options Template rizzea College Prep High School Template: Arizona College Prep High School	
Enable Nosc II	d All	if Available in
0	Reports and Plans	
,	Academic Progress	El Student El Parent
	Personal Learning Plan	El Student El Parent
¢	Program Participation	Disadent Diramet
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	Special Education Other Documents	Ditadest Bifweet

Parent(s)/Guardian(s) and the student must have a valid Portal account in order to receive locked Special Ed documents. See the Portal Setup (Admin) documentation for additional information on how to set up a Portal account.