

Comparable Services Plan (Hawaii) [.2223 - .2235]

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You are viewing a previous version of this article. See [Comparable Services Plan \(Hawaii\)](#) for the most current information.

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Classic View: Student Information > Special Ed > General > Documents

Search Terms: Special Ed Documents

The Comparable Service Plan is used to capture student special education plan information and match the required documentation provided by the state of Hawaii. This document describes each editor, the section(s) of the print format that include the entered information, a description of each field on the editor, and any special considerations and instructions.

Plan formats are selected in [Plan Types](#). The current print formats is **HI Comparable Services 2022**.

Editor Home

The Editor Home lists the editors available on the student's Comparable Services Plan.

Editor Home			
Name	Status	Modified By	Completed By
Education Plan	IN PROGRESS	System Administrator 1/25/22 1:01 PM	>
Enrollment Information	IN PROGRESS	System Administrator 1/25/22 1:04 PM	>
Student Information	IN PROGRESS	System Administrator 1/25/22 1:06 PM	>
Parent/Guardian Information	IN PROGRESS	System Administrator 1/25/22 1:08 PM	>
Conference Announcement	IN PROGRESS	System Administrator 1/25/22 1:09 PM	>
Conference Notification	IN PROGRESS	System Administrator 1/25/22 1:11 PM	>
Conference Actual	IN PROGRESS	System Administrator 1/25/22 1:13 PM	>
Comparable Services	NOT STARTED		>
Prior Written Notice	IN PROGRESS	System Administrator 1/25/22 1:19 PM	>

Editor Home

Header	Description
Name	The name of the editor.
Status	The state of the editor. Statuses can be: <ul style="list-style-type: none"> In Progress indicates a user has entered and saved data in that editor. Not Started is the default status for all editors. Complete indicates a user has clicked the Complete button on the editor and the editor is read only. This does not lock the editor from further editing, but indicates the user considers the editor to be finished. Not Needed indicates a user has clicked the Not Needed button on the editor. This is usually done for editors that do not apply to the student.
Modified By	The date and the user by whom the editor was last edited.
Completed By	The date and the user who clicked the Complete button for that editor.

General IEP Information

The following table lists the buttons available for the editors:

Button	Description
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Button	Description
Save	<p>Different editors have different save options. Click the arrow next to the Save & Stay button to view all saving options for any given editor.</p> <ul style="list-style-type: none"> • Save captures progress and navigates the user to the Editor Home or to the List Screen for List editors. See the Editor Types section for additional information. • Save & Stay captures progress and keeps the user on the current editor. This save button is the default save option and usually found within the detail screen of List editors, such as Goals and Objectives. • Save & Next captures progress and navigates the user to the next editor. • Save & New captures progress and creates a new record. This save button is usually found within the detail screen of a list editor, such as Goals and Objectives. See the Editor Types section for additional information.
Refresh	<p>Retrieves a new copy of data from the student's record. This includes enrollment, student, parent/guardian, and team member information. This also returns any accidentally deleted people records. Manually entered fields do not change when the refresh button is clicked. The user must Save after clicking Refresh to capture changes.</p> <p>A side panel displays listing all applicable Enrollment records for the student. See the Enrollments tool documentation for additional information.</p>
Cancel	<p>Navigates the user to the Editor Home screen or to the List Screen for List editors.</p>
Status <i>i.e. Complete, Not Needed, etc.</i>	<p>Changes the status of the editor.</p> <ul style="list-style-type: none"> • Complete indicates the editor is finished. This makes the editor read-only. However, this does not lock the editor from further editing. To further edit after an editor is marked Complete, the user must click In Progress. • Not Needed indicates the editor does not apply to the student's plan. This makes the editor read only. However, this does not lock the editor from further editing. To further edit after an editor is marked Not Needed, click the In Progress button. • In Progress only displays when the editor is in the Complete or Not Needed status and allows additional edits to be made.
Print	<p>Prints the entire plan.</p>
Editors	<p>Opens a side panel listing all the available editors and their status. Select an editor from this list to navigate to that editor or click Close to collapse the side panel.</p>
Previous	<p>Navigates the user to the previous editor.</p>

Button	Description
Next	Navigates the user to the next editor.

Editor Types

There are two types of editors available: List or Basic editors. When navigating to a Basic editor, the list of fields within the editor display. List editors display a list of all records within that editor. Clicking an existing record or the New button opens the detail view for an individual record. An example list editor is the **Goals and Objectives** editor.

Padlock Icon

Only one user at a time can actively work on an editor. A person with a padlock icon  displays in the Editors side pane, Editor Home, and List Screen of list editors indicating which editors currently have users working on them. Hovering over the icon displays the name of the user who has checked out the editor, including the current user (you).

Editors that are currently being edited are read only for all other users. The name of the person working on the editor displays in the header. Once the editing user navigates away from an editor, that editor becomes available to work on.

Template Banks

Certain fields within several editors have a paper icon  displays next to their name. When the icon is clicked, a side panel displays with the available library of predetermined text for that field. [Template Banks](#) are managed in System Administration.

Editors

[Education Plan](#) | [Enrollment Information](#) | [Student Information](#) | [Parent/Guardian Information](#) | [Conference Announcement](#) | [Conference Notification](#) | [Conference Actual](#) | [Comparable Services](#) | [Prior Written Notice](#)

The following section lists each editor and describes each field on the editor.

Education Plan

The Education Plan editor includes the various dates associated with the plan, why the IEP meeting was held, and how student progress is reported.

This editor must be saved before entering data into other editors.

Plan Type
Transfer

Enrollment Start Date i

month/day/year 

Initial IEP Due Date i

month/day/year 

In consultation with the parent(s)/legal guardian(s), the Department of Education agrees to provide comparable services until:

- An initial evaluation has been completed.
- An IEP has been developed, adopted, and implemented.
- Student has been deemed NOT eligible.

For ages 14+:

- Regular Diploma
- Certificate of Completion

For Agency Use Only:

Parent/legal guardian has provided a copy of the individual's documents in his/her native language or other mode of communication. Date of records provided to parent/legal guardian.

Education Plan Editor

▶ Click here to expand...

Field	Description	Validation
Plan Type <i>Required</i>	The type of plan. This displays "Transfer."	This is read only.
Enrollment Start Date <i>Required</i>	The student's Enrollment date.	* This is a required element for marking this editor as complete. This field auto populates from the Start Date of the selected Enrollment on the Enrollment Information editor.
Initial IEP Due Date <i>Required</i>	The day on which the plan is due for the student.	* This is a required element for marking this editor as complete. This field becomes available after the Enrollment Start Date is populated. This auto populates to be 90 days from the Enrollment Start Date.
In consultation with the parent(s)/legal guardian(s), the Department of Education agrees to provide comparable services until:	Options include: <ul style="list-style-type: none"> • An initial evaluation has been completed. • An IEP has been developed, adopted, and implemented. • Student has been deemed NOT eligible. 	N/A

Field	Description	Validation
For ages 14+:	Options include: <ul style="list-style-type: none"> • Regular Diploma • Certificate of Completion 	N/A
For Agency Use Only:		
Parent/legal guardian was provided a copy of the procedural safeguards in his/her native language or other mode of communication.	Indicates the parent/legal guardian was given a copy of the procedural safeguards in their native language or some other mode of communication.	* This is required in order to Complete the editor.
Date safeguards provided to parent/legal guardian <i>*Required</i>	The date the procedural safeguards were provided to the parent/guardian.	* This is required in order to Complete the editor.
Parent/legal guardian was provided a copy of the IEP at no cost. <i>*Required</i>	Indicates the parent/legal guardian was given a copy of the IEP.	* This is required in order to Complete the editor.
Date IEP provided to parent/legal guardian <i>*Required</i>	The date a copy of the IEP was given to the parent/guardian.	* This is required in order to Complete the editor.
If the student is of transition age, he/she was provided a copy of the procedural safeguards in his/her native language or other mode of communication.	Indicates the student was given a copy of the procedural safeguards in their native language or some other mode of communication.	N/A
Date safeguards provided to student	The date the procedural safeguards were provided to the student.	N/A
Student was provided a copy of IEP at no cost.	Indicates the student was given a copy of the IEP.	N/A
Date IEP provided to student	The date a copy of the IEP was given to the student.	N/A

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Enrollment Information

The Enrollment Information editor reports Special Education information from the student's Enrollment record. This editor is read only.

The **Refresh** button retrieves a fresh copy of data from the student's record. See the General Evaluation Information section for additional information.

Enrollment Information
IN PROGRESS
Editor 2 of 9

Click Refresh to retrieve a new copy of data from a selected Enrollment record. Upon refresh, Eligibility Category will be copied from the latest, locked Evaluation. Information entered into this editor will modify the student's current Enrollment record when the plan is locked.

Eligibility Category	<input type="text" value="ASD: Autism Spectrum Disorder"/>					
Special Ed Status *	<input type="text" value="1: Receiving Services"/>					
District	Complex Area	Grade				
<input type="text" value="30: Leeward"/>	<input type="text" value="931: Campbell-Kapolei"/>	<input type="text" value="11"/>				
School Name	School Phone	School Year				
<input type="text" value="Campbell High School"/>	<input type="text" value="808-555-0081"/>	<input type="text" value="21-22"/>				
Transferring School or Program	<input type="text"/>					

Enrollment Information Editor

► Click here to expand...

Field	Description	Validation
Eligibility Category <i>*Required</i>	The student's eligibility area.	* This is a required element for saving this editor. This auto populates from the most recent locked evaluation > Eligibility Decision editor > Eligibility Category field. The user is able to update this field if needed. The options in this field are defined at a state level and cannot vary by district.
Special Ed Status <i>*Required</i>	The student's special ed status.	* This is required in order to Complete the editor. This auto populates based on the selected Enrollment record.
District	The student's district of residence.	This field is pulled from the Enrollment record, then System Administration > Resources > School > State Data Elements > Sub-District. When "FAPE for Private School & Homeschool Students" is selected as the Plan Type, this field becomes editable.

Field	Description	Validation
Complex Area	The location of the building.	This field is pulled from the Enrollment record, then System Administration > Resources > School > State Data Elements > Complex Area. When "FAPE for Private School & Homeschool Students" is selected as the Plan Type, this field becomes editable.
Grade	The student's current grade.	This field auto populates from the selected enrollment record when the user selects the Refresh button. When "FAPE for Private School & Homeschool Students" is selected as the Plan Type, this field becomes editable.
School Name	The name of the school associated with the student's Enrollment record.	This field auto populates from the selected enrollment record when the user selects the Refresh button. When "FAPE for Private School & Homeschool Students" is selected as the Plan Type, this field becomes editable.
School Phone	The phone number of the school associated with the student's Enrollment record.	This field auto populates from System Administration > Resources > School > (School Name) > Phone, and use the school associated with the selected enrollment record when the user selects the Refresh button. When "FAPE for Private School & Homeschool Students" is selected as the Plan Type, this field becomes editable.
School Year	The school year associated with the student's Enrollment record.	This field auto populates from the selected enrollment record when the user selects the Refresh Button. When "FAPE for Private School & Homeschool Students" is selected as the Plan Type, this field becomes editable.

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Student Information

The Student Information editor displays basic information about the student such as demographic information. This is a read-only editor.

The **Refresh** button retrieves a fresh copy of data from the student's record. See the General IEP Information section for additional information.

Student Information IN PROGRESS

When a Plan is generated, a snapshot of the student's information is taken from Census. Click Refresh to retrieve a new copy of data.

Last Name	First Name	Middle Name	Suffix
██████████	Justin Ryan	R	
Age	Birthdate	Gender	
17	██████████	M	
Language at Home	First Language	Most Used Language	
A: English	A: English	A: English	
Address	HI 96706	Student Number	State ID

Case Manager Information

Name	Title
Phone	

Student Information Editor

► [Click here to expand...](#)

Field	Description	Ad Hoc
Last Name	The student's last name.	Census > People > Demographics > Last Name identity.lastName
First Name	The student's first name.	Census > People > Demographics > First Name identity.firstName
Middle Name	The student's middle name.	Census > People > Demographics > Middle Name identity.middleName
Suffix	The student's suffix.	Census > People > Demographics > Suffix Name identity.suffix
Age	The age of the student.	Census > People > Demographics > Age
Birthdate	The student's birthdate.	Census > People > Demographics > Birth Date identity.birthDate
Gender	The student's gender.	Census > People > Demographics > Gender identity.gender

Field	Description	Ad Hoc
Language At Home	The student's home primary language.	Census > People > Demographics > Language at Home
First Language	The student's first spoken language.	Census > People > Demographics > First Language
Language Most Used	The student's language that they use most.	Census > People > Demographics > Language Most Used
Address	<p>The student's address.</p> <p>This field becomes a dropdown if more than one address exists for the student. The primary household displays by default.</p>	Census > Households > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip
Student Number	The student's identification number.	Census > People > Demographics > Student Number
State ID	The student's state identification number.	Census > People > Demographics > State ID

Case Manager Information

These fields are read-only.

Name	The first and last name of the team member.	Student Information > Special Ed > General > Team Members
Title	The role of the team member.	Student Information > Special Ed > General > Team Members
Phone	The phone number of the team member.	Student Information > Special Ed > General > Team Members

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Parent/Guardian Information

The Parent/Guardian Information editor populates based on the guardian checkbox on the student's [Relationships](#) tool. The editor includes [Demographics](#) information for the student's guardian.

The **Delete** button next to each parent/guardian can be used to remove a parent/guardian from the IEP.

The **Refresh** button retrieves a new copy of parent/guardians' data. This also returns any

accidentally deleted people. Manually entered fields do not change when the refresh button is clicked. The user must **Save** after clicking Refresh to capture changes.

Parent/Guardian Information IN PROGRESS

When a Plan is generated, a snapshot of the parent/guardian information is taken from Census. Individuals with the Guardian check box marked on the Relationship tool for the student display below. Click Refresh to retrieve a new copy of data.

Rod - Father	Delete
Print Sequence 1 ▼	
Address HI 96706	
Home Phone	Work Phone
Cell Phone [REDACTED]	
E-mail [REDACTED]	
Interpreter Required <input type="checkbox"/>	
Rose - Mother	
Print Sequence 2 ▼	
Address HI 96706	
Home Phone	Work Phone
Cell Phone [REDACTED]	
E-mail [REDACTED]	
Interpreter Required <input type="checkbox"/>	

Parent/Guardian Information Editor

▶ [Click here to expand...](#)

Field	Description	Ad Hoc	Validation
Last Name	The last name of the parent/guardian.	Census > People > Demographics > Last Name identity.lastName	This field populates from Census. This is part of the header for the parent/guardian.
First Name	The first name of the parent/guardian.	Census > People > Demographics > First Name identity.firstName	This field populates from Census. This is part of the header for the parent/guardian.
Middle Name	The suffix of the parent/guardian.	Census > People > Demographics > Suffix Name identity.suffix	This field populates from Census. This is part of the header for the parent/guardian.

Field	Description	Ad Hoc	Validation
Suffix	The suffix of the parent/guardian.	Census > People > Demographics > Suffix Name identity.suffix	This field populates from Census. This is part of the header for the parent/guardian.
Relationship	The relation of the parent/guardian to the student.	Census > People > Relationships	This field populates from Census. This is part of the header for the parent/guardian.
Print Sequence	The print order of the parent/guardian(s) on the IEP.	N/A	If no Sequence is selected, parent/guardian(s) print in the order displayed in the UI. If any Sequences are selected, only parent/guardian(s) with a sequence number prints in the order defined.
Address	The parent/guardians' address.	Census > Households > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip	This field populates from Census. If there are multiple addresses for a person, a drop down with an option to select which address displays. If there is only one address, the drop down only has one option. The populated address is the one marked "Primary."
Home Phone	The home phone number of the parent/guardian.	Census > People > Demographics > Household Phone	This field populates from Census.
Work Phone	The work phone of the parent/guardian.	Census > People > Demographics > Work Phone	This field populates from Census.

Field	Description	Ad Hoc	Validation
Cell Phone	The cell phone of the parent/guardian.	Census > People > Demographics > Cell Phone	This field populates from Census.
Email	The primary email address for the parent/guardian.	Census > People > Demographics > Email	This field populates from Census.
Interpreter Required	Indicates an interpreter is needed for the meeting.	N/A	N/A

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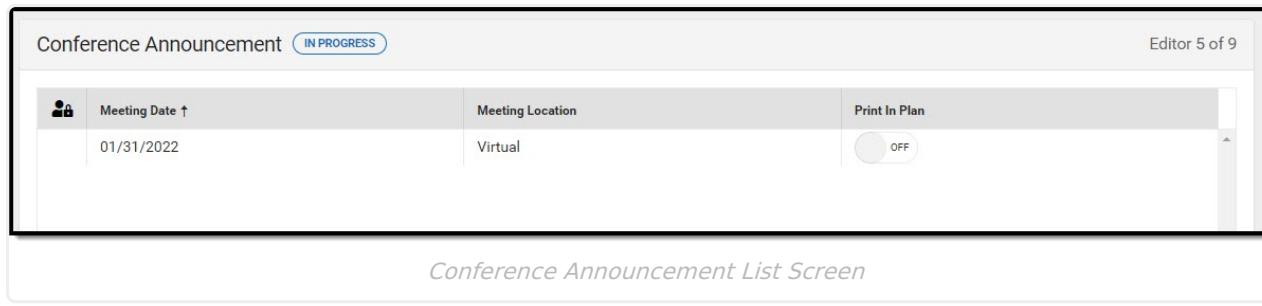
Conference Announcement

The Conference Announcement editor is used to document planned meetings of the IEP team.

This editor is not optional and must be completed.

► [Click here to expand...](#)

Conference Announcement List Screen



Conference Announcement IN PROGRESS Editor 5 of 9

 Meeting Date ↑	Meeting Location	Print In Plan
01/31/2022	Virtual	<input type="checkbox"/> OFF

Conference Announcement List Screen

Column Name	Description
Padlock Icon	The user currently working on the record.
Meeting Date	The date of the meeting.
Meeting Location	The location of the meeting.
Print in Plan	Indicates this meeting information prints on the Plan.

Conference Announcement Detail Screen

Conference Announcement: 1/31/2022

Print In Plan

Scheduled Conference Date *



Scheduled Conference Time *



Announcement Date



Scheduled Conference Location *

Conference Location (specify)

The conference is for the following purpose(s):

A conference announcement must be generated for each purpose.

Plan Process

- If IDEA eligible, develop an Individualized Education Program (IEP).
- Determine educational placement.
- Review the plan's effectiveness/appropriateness in meeting the needs of your child, revise and renew it, if needed.

Comparable Services

- Review and adopt the transferring plan until a new evaluation and plan can be completed.

Learning Loss

- Address Learning Loss (Including education loss, skill loss, lack of expected progress, and any new needs) due to significant school disruption (e.g. pandemic, flood, volcanic activity).

Discipline

- Discuss a Manifestation Determination (MD) - Student Discipline

Attendance

No records available.

Conference Announcement Detail Screen

Field	Description	Validation
Print in Plan	Indicates this meeting information prints on the Plan.	This defaults to unmarked.
Scheduled Conference Date <i>Required</i>	The meeting date.	N/A
Scheduled Conference Time <i>Required</i>	The meeting time.	N/A
Announcement Date	The date a notification was sent notifying the team members of the meeting.	N/A
Scheduled Conference Location	The location of the meeting. Options include: Virtual, Phone, or In-Person.	N/A
Conference Location (specify)	The location of the meeting, if clarification or details are needed.	N/A

Field	Description	Validation
Plan Process	<p>Indicates the type of evaluation processes needed for the student. Options include:</p> <ul style="list-style-type: none"> • If IDEA eligible, develop an Individualized Education Program (IEP). • Determine educational placement. • Review the plan's effectiveness/appropriateness in meeting the needs of your child, revise and renew it, if needed. 	N/A
Comparable Services	<p>Indicates the student needs an Learning Loss Plan. Options include:</p> <ul style="list-style-type: none"> • Review and adopt the transferring plan until a new evaluation and plan can be completed. 	N/A
Learning Loss	<p>Indicates the student needs an Learning Loss Plan. Options include:</p> <ul style="list-style-type: none"> • Address Learning Loss (including education loss, skill loss, lack of expected progress, and any new needs) due to significant school disruption (e.g. pandemic, flood, volcanic activity). 	N/A
Discipline:	<p>Indicates the student needs an Discipline Evaluation. Options include:</p> <ul style="list-style-type: none"> • Discuss a manifestation Determination (MD) - Student Discipline 	N/A
Attendance		

Field	Description	Validation
First Name	<p>The first name of the team member.</p> <p>This field displays information from the Special Education Team Member tool. Any Team Member with an active status displays here as read-only.</p> <p>The user can also enter an additional entry for this field and when they do, an open text field displays and the user is required to enter a value.</p>	<p>This field is required for saving this editor.</p>
Last Name	<p>The last name of the team member.</p> <p>This field displays information from the Special Education Team Member tool. Any Team Member with an active status displays here as read-only.</p> <p>The user can also enter an additional entry for this field and when they do, an open text field displays and the user is required to enter a value.</p>	<p>This field is required for saving this editor.</p>

Field	Description	Validation
Role	<p>The role of the team member.</p> <p>This field is required for saving this editor.</p> <p>Values available in this dropdown include locked attributes:</p> <ul style="list-style-type: none"> • General Education Teacher • Related Service Provider • Special Education Teacher • Specialized Support Instructional Personnel • Principal • Vice Principal <p>Unlocked Attribute values include:</p> <ul style="list-style-type: none"> • determined by district 	
Invited	<p>Indicates this team member has been invited to the meeting.</p>	N/A
Excused	<p>Indicates this team member is excused from the meeting.</p>	<p>This field only displays when the Role for that person is one of the following:</p> <ul style="list-style-type: none"> • General Education Teacher • Related Service Provider • Special Education Teacher • Specialized Support Instructional Personnel • Principal • Vice Principal

Field	Description	Validation
Designee for Admin	Indicates this team member has been designated as an administrator for the meeting.	When Role is Principal or Vice Principal, this check box is grayed out.
Admin/Designee Statement <i>This section becomes available when the Designee for Admin checkbox is selected.</i>		
Admin Designee Statement:	Indicates why an admin is being used in the meeting.	This is required for saving the editor when available.

Conference Notification

The Conference Notification editor is used to document when notifications were sent out informing the team of meetings.

► [Click here to expand...](#)

Conference Notification List Screen



The screenshot shows a table with three columns: a padlock icon, 'Scheduled Meeting' with a dropdown arrow, and 'Mutually Agreed'. The 'Scheduled Meeting' cell contains '01/31/2022'. The 'Mutually Agreed' cell contains 'Yes'. The top right corner of the table header says 'Editor 6 of 9'.

Conference Notification List Screen

Column Name	Description
Padlock Icon	The user currently working on the record.
Meeting Date	The date of the planned meeting.
Mutually Agreed	Indicates if the parent/guardian consented to the meeting date.

Conference Notification Detail Screen

Conference Notification

Scheduled Meeting Date	1/31/2022	Mutually Agree Upon	Yes, parent agrees to date and time of meeting and knows the purpose(s) of the meeting
1st Notification		Notified By	Counselor
Notified Date	01/24/2022	Notified Outcome	
Notify Method	Email	Notified By	
month/day/year	<input type="button" value="Calendar"/>	Notified Outcome	
2nd Notification		Notified By	
Notified Date	month/day/year	Notified Outcome	
Notify Method	Select methods...	Notified By	
month/day/year	<input type="button" value="Calendar"/>	Notified Outcome	
3rd Notification		Notified By	
Notified Date	month/day/year	Notified Outcome	
Notify Method	Select methods...	Notified By	
month/day/year	<input type="button" value="Calendar"/>	Notified Outcome	
Outside Agency Parent Consent Tracking			

Conference Notification Detail

Field	Description	Validation
Conference Notification		
Scheduled Meeting Date	The date of the scheduled meeting.	This field is required for saving the editor. The options in this field are determined from the Conference Announcement entries.
Mutually Agreed Upon:	Indicates if the parent/guardian consents to the meeting date. Options include: <ul style="list-style-type: none"> • Yes, parent agrees to date and time of meeting and knows the purpose(s) of the meeting. • No (unable to move forward until three attempts) 	These options are hard coded.
Notified Date:	The date the parent/guardian was notified of the planned meeting date.	There is space for a 1st, 2nd, and 3rd notification fields.

Field	Description	Validation
Notified By:	Indicates who sent the notification to the parent/guardian.	N/A
Notify Method:	<p>The manner in which the parent/guardian was notified. Options include:</p> <ul style="list-style-type: none"> • Phone • Personal Contact • Regular Mail • Return Receipt Required • Personally Delivered • Email • Fax 	These options are hard coded.
Notified Outcome:	The outcome of the notification.	
Outside Agency Parent Consent Tracking		
Agency	<p>Indicates which outside agency is involved, if applicable. Options include:</p> <ul style="list-style-type: none"> • Department of Health - Early Intervention • Department of Health - Developmental Disabilities Division • Department of Health - Child/Adolescents Mental Health Division • Department of Human Services - Division of Vocational Rehabilitation • Other (specify) 	When Other (specify) is marked, the user is able to manually enter their own value.
Consent to Invite Needed	Indicates that an Outside Agency should be invited and the Consent to Invite document is needed.	N/A
Consent to Invite Received	Indicates a signed Consent to Invite document was returned to the district.	N/A

Field	Description	Validation
Consent Received Date	The date the signed Consent to Invite document was returned to the district.	This field becomes available and required when the Consent to Invite Received check box is selected.

Team Member Notification Tracking

This table is read only and displays the following columns:

- Team Member Name
- Date
- Method
- Notified By
- Outcome
- >

All of these read only values come from the user selecting the **Add Notification** button and entering information on a side panel recording when notifications were made to certain team members.

Notification Tracking (side panel)

This displays when the user clicks **Add Notification** or on the ">" from a previous entry in the table.

Team Member Name:	The name of the team member.	The options in this field are determined from the marked entries from Conference Announcement > Invited checkbox. This displays as First Name Last Name, Role.
Date:	The date the team member was notified.	N/A
Method:	The manner in which the team member was notified. Options include: <ul style="list-style-type: none"> • Phone • Personal Contact • Regular Mail • Return Receipt Required • Personally Delivered • Email • Fax 	These options are hard coded. Multiple options may be selected.
Notified By:	The person who reached out to the team member.	N/A

Field	Description	Validation
Notified Outcome:	The response or end result of the notification.	N/A

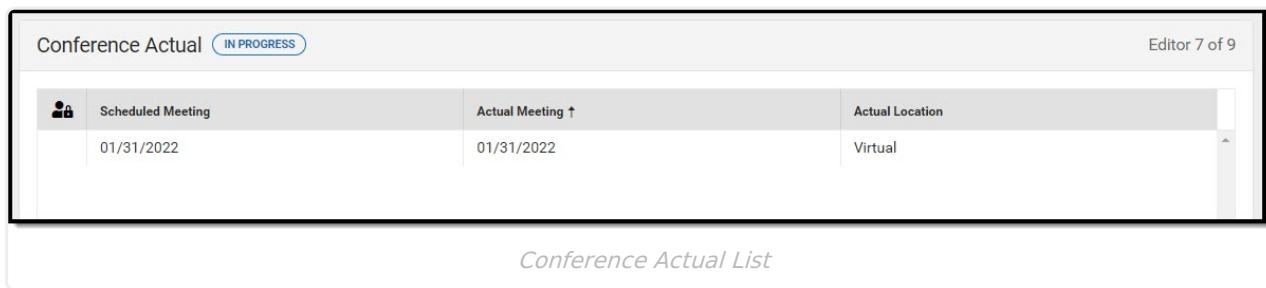
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Conference Actual

The Conference Actual editor is used to document meetings that took place.

► [Click here to expand...](#)

Conference Actual List Screen



The screenshot shows a table with three columns: 'Scheduled Meeting' (with a padlock icon), 'Actual Meeting' (with a date of 01/31/2022), and 'Actual Location' (Virtual). The table has a header row and a single data row. The header row contains the column names and a 'Padlock Icon' column. The data row contains the corresponding values for the meeting.

Conference Actual IN PROGRESS

Padlock Icon	Scheduled Meeting	Actual Meeting †	Actual Location
	01/31/2022	01/31/2022	Virtual

Editor 7 of 9

Conference Actual List

Column Name	Description
Padlock Icon	The user currently working on the record.
Meeting Date	The date of the planned meeting.
Mutually Agreed	Indicates if the meeting date was agreed upon.

Conference Actual Detail Screen

Conference Actual: 1/31/2022

Scheduled Meeting Date 1/31/2022	Scheduled Conference Time 11:00:00 AM	Scheduled Conference Location Virtual	Scheduled Conference Location (specify) Virtual
Actual Conference Date * 01/31/2022	Actual Conference Time * 11:00 AM	Actual Conference Location * Virtual	Actual Conference Location (specify) Virtual

The conference is for the following purpose(s):

A conference announcement must be generated for each purpose.

Scheduled Actual
 Plan Process

- If IDEA eligible, develop an Individualized Education Program (IEP).
- Determine educational placement.
- Review the plan's effectiveness/appropriateness in meeting the needs of your child, revise and renew it, if needed.

Comparable Services

- Review and adopt the transferring plan until a new evaluation and plan can be completed.

Learning Loss

- Address Learning Loss (Including education loss, skill loss, lack of expected progress, and any new needs) due to significant school disruption (e.g. pandemic, flood, volcanic activity).

Discipline

- Discuss a Manifestation Determination (MD) - Student Discipline

Attendance

TEAM MEMBERED NAME / ROLE	ATTENDED	ADMIN/DESIGNEE	EXCUSED	REASON FOR EXCUSE * *
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Conference Actual Detail

Field	Description	Validation
Actual Conference Notification: <date of actual conference>		
The "<date of actual conference>" populates based on the Actual Conference Date entered.		
Scheduled Meeting Date	The date of the planned meeting.	The options in this field are determined from the Conference Announcement > Scheduled Conference Date entries.
Scheduled Conference Time	The time of the planned meeting.	The options in this field are determined from the Conference Announcement entries. This field is read-only.
Scheduled Conference Location	The planned conference location.	The options in this field are determined from the Conference Announcement entries. This field is read-only.
Actual Conference Date	The date the meeting took place.	This is required for saving the editor.

Field	Description	Validation
Actual Conference Time	The time the meeting took place.	This is required for saving the editor.
Actual Conference Location	<p>The location of the meeting. Options include:</p> <ul style="list-style-type: none"> • Phone • Virtual • In-Person 	<p>This is a required element for saving the editor.</p> <p>The values available are hard-coded.</p>
Actual Conference Location (specify)	The location of the meeting, if clarification or details are needed.	N/A
Plan Process:	<p>Indicates the type of plan processes needed for the student. Displays two rows of checkboxes, Scheduled and Actual. Options include:</p> <ul style="list-style-type: none"> • If IDEA eligible, develop an Individualized Education Program (IEP). • Determine educational placement. • Review the plan's effectiveness/appropriateness in meeting the needs of your child, revise and renew it, if needed. 	<p>The Scheduled column is read only and is determined based on the Scheduled Meeting Date selected.</p> <p>The Actual column can be edited.</p> <p>If the user selects one of these options, they are not be able to select Learning Loss.</p> <p>This field has two parts to it. The first part, "Scheduled" are read only values that are checked as appropriate upon selection of the Scheduled Meeting Date field above. The second part, "Actual" are editable values that allow the user to manually select the appropriate values.</p>
Comparable Services	<p>Indicates the student needs a Comparable Services Plan. Options include:</p> <ul style="list-style-type: none"> • Review and adopt the transferring plan until a new evaluation and plan can be completed. 	<p>The Scheduled column is read only and is determined based on the Scheduled Meeting Date selected.</p> <p>The Actual column can be edited.</p>

Field	Description	Validation
Learning Loss:	<p>Indicates the student needs an Learning Loss Evaluation. Displays two rows of checkboxes, Scheduled and Actual. Options include:</p> <ul style="list-style-type: none"> Address Learning Loss (including education loss, skill loss, lack of expected progress, and any new needs) due to significant school disruption (e.g. pandemic, flood, volcanic activity) 	<p>The Scheduled column is read only and is determined based on the Scheduled Meeting Date selected.</p> <p>The Actual column can be edited.</p> <p>If the user selects this value they are not able to select Plan Process.</p> <p>This field has two parts to it. The first part, "Scheduled" are read only values that are checked as appropriate upon selection of the Scheduled Meeting Date field above. The second part, "Actual" are editable values that allow the user to manually select the appropriate values.</p>
Discipline:	<p>Indicates the student needs an Discipline Evaluation. Displays two rows of checkboxes, Scheduled and Actual. Options include:</p> <ul style="list-style-type: none"> Discuss a manifestation Determination (MD) - Student Discipline 	<p>This field has two parts to it. The first part, "Scheduled" are read only values that are checked as appropriate upon selection of the Scheduled Meeting Date field above. The second part, "Actual" are editable values that allow the user to manually select the appropriate values.</p>
Attendance		

Field	Description	Validation
Team Member Name	The name of the team member.	This field is read-only and auto populates based on Team Members entered within the Conference Announcement editor who have the Invited checkbox marked. The First Name, Last Name, and Role fields display.
Attended	Indicates the team member attended the meeting.	N/A
Admin/Designee	Indicates if the team member is an admin designee for the meeting.	This field is read-only and auto selected if it was selected within the Conference Announcement editor.
Excused	Indicated the team member was excused from the meeting.	This field is read-only and auto selected if it was selected within the Conference Announcement editor.
Reason for Excusal	The reason the team member was excused from the meeting.	This field is blank upon entering the editor and requires the user to enter a value if the corresponding Excused checkbox is marked.

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Comparable Services

The Comparable Services editor is used to document the services to be provided to the student to meet their needs.

► [Click here to expand...](#)

Comparable Services List Screen

Comparable Services NOT STARTED

Editor 8 of 9


Service Group
Service
Start Date
End Date
ESY

No records available.

Comparable Services Editor List Screen

Column Name	Description
Padlock Icon	The user currently working on the record.
Service Type	The service type.
Service	The name of the service.
Start/End Dates	The first and last day of the service.
ESY	Indicates the service is part of an Extended School Year program.

Comparable Services Detail Screen

Comparable Service
Service Group *

Extended School Year

Location *

Duration and Frequency
Start Date *

month/day/year


Projected Ending Date *

month/day/year


Frequency & Duration *
Comparable Services Editor Detail Screen

Field	Description	Validation
Service Group	The service group. Options include: <ul style="list-style-type: none"> Supplementary Aids and Services Program Modifications Supports for School Personnel Special Education / Specially Designed Instruction Related Services 	This is a required element for saving the editor.

Field	Description	Validation
Extended School Year	Indicates the service is part of an Extended School Year program.	N/A
When "Supplementary Aids and Services" is selected, the following field displays:		
Supplementary Aids and Services	A text field used to document the name of the supplementary aids and services to be provided.	This is a required element for saving the editor.
When "Program Modifications" is selected, the following field displays:		
Program Modifications	Any program modifications for the student.	This is a required element for saving the editor.
When "Supports for School Personnel" is selected, the following fields display:		
Support	The type of support. Options include: <ul style="list-style-type: none"> • Consultation • Training • Other 	This is a required element for saving the editor.
Other (specify)	An other type of support, if applicable.	When Other is selected, this appears and is required.
Description of Support	A text field used to describe the support.	This is a required element for saving the editor
When "Special Education / Specially Designed Instruction" is selected, the following fields display:		
Service Type	The type of service. Options include: <ul style="list-style-type: none"> • Academic • Functional 	This is a required element for saving the editor.

Field	Description	Validation
Service	<p>When Academic is selected, options include:</p> <ul style="list-style-type: none"> • Speaking • Listening Comprehension • Reading Decoding • Reading Fluency • Reading Comprehension • Written Expression • Math Calculation • Math Reasoning • Pre-K Literacy • Pre-K Math • Pre-K Writing • Other <p>When Functional is selected, options include:</p> <ul style="list-style-type: none"> • Attention • Behavior • Daily Living/Adaptive • Motor Skills • Organization • Speech/Language/Communication • Transition • Vocational Skills • Other 	This is a required element for saving the editor.
Other (specify)	An other service, if applicable.	When Other is selected, this appears and is required.
When "Related Services" is selected, the following field displays:		

Field	Description	Validation
Service	<p>The type of related service. Options include:</p> <ul style="list-style-type: none"> • Audiology • Counseling • Hearing Services • Interpreting Services • Occupational Therapy • Orientation and Mobility • Parent Education and Training • Physical Therapy • Psychological Services • Recreation • Skilled Nursing • Social Worker • Speech-Language Pathology Services • Transportation • Vision Services • Other 	This is a required element for saving the editor.
Other (specify)	An other related service, if applicable.	When Other is selected, this appears and is required.

The remaining fields display regardless of the above selection.

Location	<p>The location of the service. Options include:</p> <ul style="list-style-type: none"> • General Education • Special Education • Combination 	This is a required element for saving the editor.
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Duration and Frequency

Start Date	The first day of the service.	N/A
Projected Ending Date	The last day of the service.	N/A
Frequency & Duration	A description of the frequency and duration of the service.	This is a required element for saving the editor.

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Prior Written Notice

The Prior Written Notice editor provides a space for descriptions and explanations related to proposed or refused actions for a student.

► [Click here to expand...](#)

Prior Written Notice List Screen



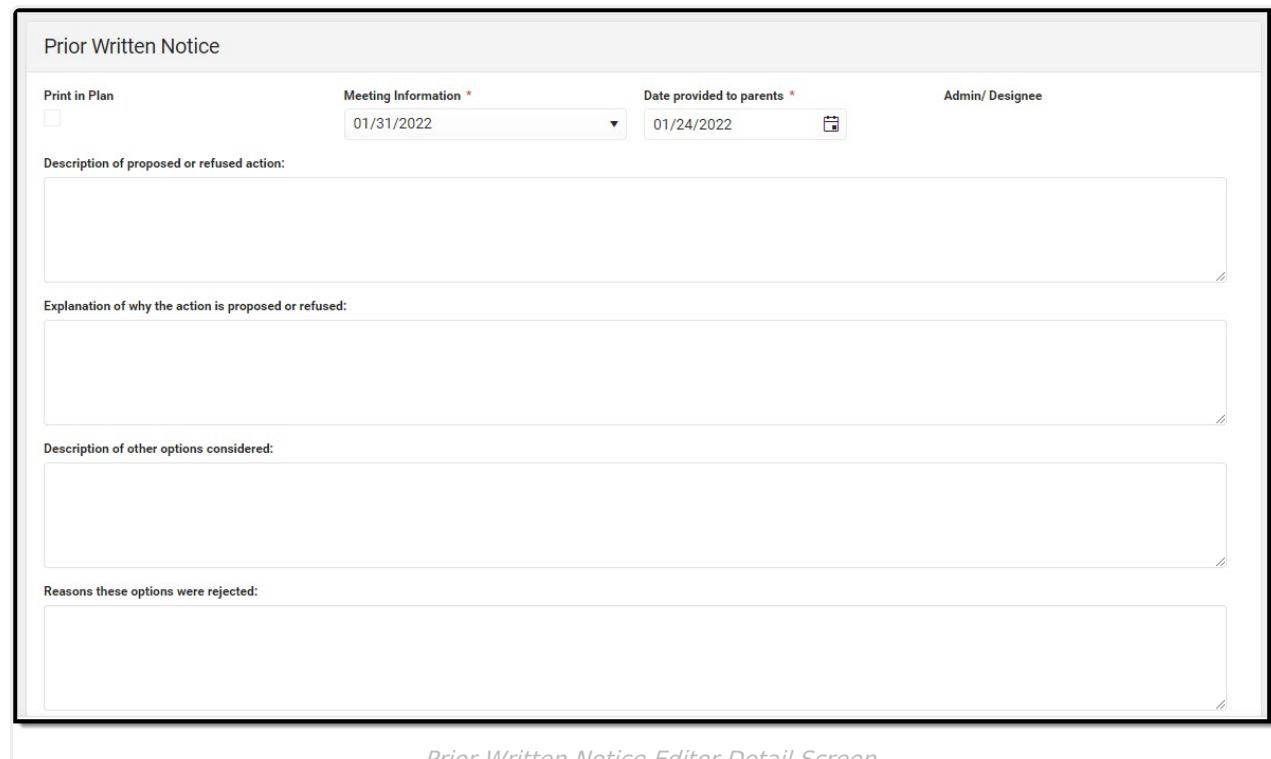
Prior Written Notice IN PROGRESS

Meeting Information	Date provided to parents	Print In Plan
01/31/2022	01/24/22	<input type="checkbox"/> OFF

Prior Written Notice List Screen

Column Name	Description
Padlock Icon	The user currently working on the record.
Meeting Information	The meeting purpose information.
Date Provided to Parents	The date the notice was provided to the student's parent/guardian(s).
Print in Plan	Indicates this record prints on the Plan.

Prior Written Notice Detail Screen



Prior Written Notice

Print in Plan	Meeting Information <small>*</small>	Date provided to parents <small>*</small>	Admin/ Designee
<input type="checkbox"/>	01/31/2022	01/24/2022 <input type="button" value="Calendar"/>	

Description of proposed or refused action:

Explanation of why the action is proposed or refused:

Description of other options considered:

Reasons these options were rejected:

Prior Written Notice Editor Detail Screen

Field	Description	Validation
Print in Plan	Indicates this record prints on the Plan.	Defaults to unmarked.
Meeting Information:	The meeting purpose information.	This is a required element for saving the editor. The options in this field are determined from the Conference Actual entries. The values in this field are the title of the selected Conference Purpose along with the Actual Conference Date. This value is also displayed on the Prior Written Notice Main List Editor as the primary sort option.
Date provided to parents:	The date the notice was provided to the student's parent/guardian(s).	This is a required element for saving the editor.
Admin / Designee	Indicates this team member has been designated as an administrator for the meeting.	This field is read only with information auto populating from the Conference Actual and whoever is marked as the Designee for Admin.
Description of proposed or refused action:	A description of the proposed or refused action.	N/A
Explanation of why the action is proposed or refused:	An explanation of why the action is proposed or refused.	N/A
Description of other options considered:	A description of other options considered.	N/A
Reasons these options were rejected:	An explanation for why these other options were rejected.	N/A
Description of the evaluation procedures, test, records, or reports used as a basis for the proposed/refused action:	An explanation for the data used for the basis of the action.	N/A

Field	Description	Validation
Other relevant factors:	Any other information that may be relevant.	N/A

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