Special Ed Setup - State Reporting Purposes Only (Arizona) [.2211 - .2307]

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You are viewing a previous version of this article. See Special Ed Setup - State Reporting Purposes Only (Arizona) for the most current information.

Setup | Create Documents for Students | Update an IEP | Report Exit Data - Optional Exit Evaluations

This article is for customers NOT using Campus Special Education.

This article describes the necessary setup so that special education information reports correctly in the SAIS 014 Special Ed Participation transaction for customers not using Campus as their primary special education program. This transaction reports based on data entered in IEPs and Exit Evaluations.

See the State Reported Special Ed Fields (Arizona) document for information about which Special Ed fields need to be filled out for State Reporting purposes.

Do not use this article if you are using Infinite Campus to manage your legally compliant special education documents.

Students need two types of documents for state reporting:

Document	Purpose
Plan (IEP)	Records special ed participation.
Exit Evaluation	Records exit from special ed program.

Setup

Classic Path: System Administration > Special Ed > Plan Types, Eval Types

Search Terms: Special Ed Plan Types, Eval Types

Campus special education documents (plans, evaluations, etc) are managed through Plan Types and Eval Types, which are versions of a document. Plan and Eval Types allow Campus to provide current documents while maintaining historical formats for reporting and compliance purposes. Even if your district is not using Campus to manage compliant documents, you'll still need a plan type to assign to students and store their state reporting data.

Create a Plan Type - IEP

1. Click **New** to open a new Plan Type.
2. Select the **Print Format** that ends with "(current)." State reporting data is pulled from documents with this print format.

> Plan types must be created from the print format ending in **(current)** to be included in state reporting. New print formats are released yearly, which require new plan types to be created.

3. Enter an **Abbreviation** and **Name** for the plan type (such as AZ State Reporting Plan).
4. Make sure the **Active** checkbox is marked.
5. In the Plan Type Editor Detail section below, unmark the checkboxes from the *first* Education Plan editor and the *first two* Enrollment Status editors. Also remove the Sequence numbers for those three editors using the delete key on your keyboard.
6. Click **Save** when finished.

> In some districts, an IEP in the correct format is already available called **AZIEP 014 State Reporting**. Districts are free to use this document or create their own. This plan type was created during conversion.
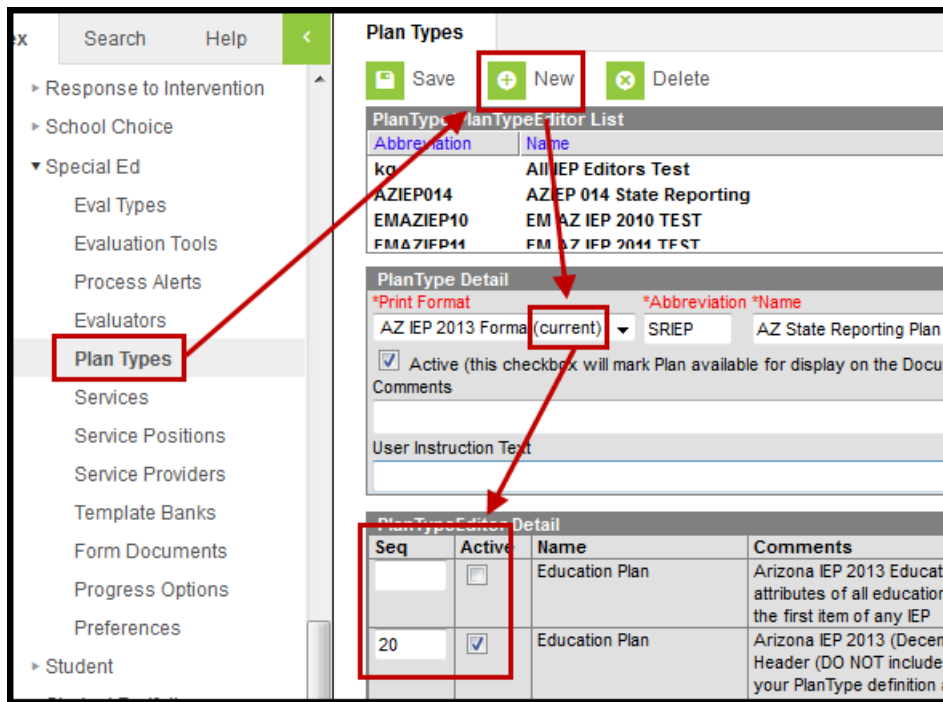
Create Documents for Students

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

Search Terms: Special Ed Documents

Create documents for each student who has an Individual Education Plan. See the Special Education Documents article for step-by-step instructions on creating documents.

Documents must be **locked** to be included in state reporting.

The following fields report in the 014 Transaction:

Plan or Eval Editor	Plan or Eval Field	014 Transaction Field	Database Location
Plan > Education Plan	**IEP Start Date**	NEEDENTRDT, SPEDENTRDT	Plan.startDate
Plan > Enrollment Status	**Primary Disability**	NEEDCD, SPEDPRIMARY	PlanState.disability1
Plan > Enrollment Status	**Disability 2, 3, 4, 5**		PlanState.disability2

Plan or Eval Editor	Plan or Eval Field	014 Transaction Field	Database Location
Plan > Enrollment Status	**Special Ed Status**		PlanState.specialEdStatus
Plan > Enrollment Status	**Special Ed Setting**	SPEDPROGSVCCD	PlanState.specialEdSetting
Plan > Enrollment Status	**Funded SPED Service DOR-**	SPEDDORID	PlanState.spedResidentDistrict (if null reports District number)
Plan > Enrollment Status	**SPED Special Enrollment Code**	SPEDSPECENR	PlanState.spedNCLBChoice
Plan > Enrollment Status	**SPED Concurrency Type**	SPEDSchoolConcurrency	PlanState.spedConcurrencyType (if null reports 'Primary'
Eval > Evaluation Information	**Exit Date**	SPEDEXITDT	Evaluation.exitDate
Eval > Evaluation Information	**Exit Reason**	SPEDEXITRSNCD	Evaluation.exitReason

Unlock or **delete** all plans that should **not** be included in the SAIS 014 Sped Participation Transaction.

Update an IEP

To update a document that is used only for state reporting purposes, make a copy of the document and update the new version. This process maintains the previous document for historical reporting purposes.

Use this process any time a change needs to be made on an IEP .

1. Select the document and click **Copy**.
2. Select the **New Plan Type** as the Plan Type created in the Setup steps above (or *AZIEP 014 State Reporting* if using that plan type).
3. Change the **Start Date** to the date the updated information is valid.
4. Change the **End Date** if desired.
5. Click **Copy** to copy the document. A warning message displays describing the results of copying.
6. Click **OK**.

When you copy a document, the End Date of the original plan (the one you copied) is updated to the day before the Start Date of the new plan (the copy). Open the new document and make any needed changes, such as updating or removing a disability. Save and **Lock** the document.

Transaction Logic #1 - IEP Updates

If a change is made to Setting or Disability, a Change transaction will be sent for the original Setting/Disability, with an Exit Date of the End Date on the original IEP, and an Exit Reason of 12: Exiting one Need continuing in another.

An Add transaction is also sent with the new Setting/Disability with a Start Date of the new (copied) IEP's Start Date and an End Date of the default Term End Date. If a Setting or Disability is removed, only a Change transaction is sent.

If a state reporting IEP needs to be modified to correct a data entry error, simply unlock the document, update it, and then relock. A delete transaction will be sent for the original data and an add record send for the new data.

Report Exit Data - Optional Exit Evaluations

Only create an Exit Evaluation if you want Exit Date and Reason to report differently from the logic described in Transaction Logic #1 (above) and #2 (below). The Exit Evaluation should include Disability, End Date, and Exit Reason. Data on an Exit Evaluation overwrites the automatic logic. Otherwise, students do not need exit evaluations.

When changes are made to an IEP, transactions report based on the logic described in **Transaction Logic #1**. In this instance, create an Exit Evaluation if an Exit Reason other than 12 should report.

At the end of the year, transactions report exit information based on the following **Transaction Logic #2**.

Transaction Logic #2 - Exit Logic Based on Enrollments

By default, records report with an Exit Date of the Term End Date and an Exit Reason of 13: School is out.

If a student has an enrollment End Status, Exit Date reports as the enrollment End Date and the Exit Reason reports based on enrollment End Status as follows:

End Status	Reported Exit Reason
W1, W10	5
W2-5, W11-13	7
W6	3

End Status	Reported Exit Reason
W8	4
W9	10
End Statuses of W, WK, WT, or any S statuses do not report in this field.	

▶ Click here to expand...

Create an Eval Type - Exit Evaluation

If a version of the Exit Evaluation is not yet available in the Student Information > Special Ed > Documents tab, use the Eval Types tool to create an Exit Evaluation.

1. Click **New** to open a new Eval Type
2. Select the **Print Format** of *AZ Exit Evaluation Format*.
3. Enter an **Abbreviation** and **Name** for the eval type.
4. Make sure the **Active** checkbox is marked.
5. Click **Save** when finished.

Refer to the 014 - Special Education Service article for specific logic.