

# IEP Writer Pro Quick Start Guide

## Front Page

THIS IEP WILL BE IMPLEMENTED DURING THE REGULAR SCHOOL TERM UNLESS NOTED IN GENERAL FACTORS

**CHILD'S INFORMATION** Student Information

Name: \_\_\_\_\_ Student Number: 123456789  
 Street: \_\_\_\_\_ Teacher: \_\_\_\_\_ Grade: \_\_\_\_\_  
 City: \_\_\_\_\_ State: OH Zip: \_\_\_\_\_  
 District Of Residence: \_\_\_\_\_ County Of Residence: \_\_\_\_\_  
 District Of Service: \_\_\_\_\_  
 If yes, provide the name of the surrogate parent: \_\_\_\_\_

**PARENTS' / GUARDIAN INFORMATION**

Name: \_\_\_\_\_  
 Street: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**OTHER INFORMATION:**

**MEETING INFORMATION**

MEETING DATE: 10/10/09  
 MEETING TYPE:  
 Initial Iep  
 Annual Review  
 Review Other Than Annual Review  
 AMENDED  
 OTHER

**IEP TIME LINES**

ETR COMPLETION DATE: \_\_\_\_\_  
 NEXT ETR DUE DATE: \_\_\_\_\_  
 IEP EFFECTIVE DATES  
 START: 10/10/09  
 END: 10/9/10  
 NEXT IEP REVIEW: 10/9/10  
 IEP BY 3rd BIRTHDAY ?  YES  N  
 (If transitioning from EI services)

**IEP FORM STATUS**  
 (Check when complete)

1. Future Planning  
 2. Special Instructional Factors  
 3. Profile  
 4. Postsecondary Transition  
 5. Postsecondary Transition Service  
 6. Measurable Annual Goals  
 7. Specially Designed Services  
 8. Transportation As A Related Servi  
 9. Nonacademic And Extra Curricular  
 10. General Factors  
 11. Least Restrictive Environment  
 12. Statewide And District Testing  
 13. Meeting Participants  
 14. Signatures

The first amendment will print on the front page. Additional amendments will print on a second page.

Print Additional Amendment (2-10)

**AMENDMENTS:** (A locked IEP must be unlocked to amend) John Sample

| IEP SECTION AMENDED | THE SCHOOL DISTRICT AND PARENTS HAVE AGREED TO MAKE THE FOLLOWING CHANGES TO THE IEP | DATE OF AMENDMENT | PARTICIPANT & ROLE |
|---------------------|--|-------------------|--------------------|
|                     |  |                   |                    |

**Navigation Bar** is use to move around the program or to use options in the IEP Writer

**F thru 14-** click to go to the page

**Find-** find a student

**Extra-** invitation, prior written notice, manifestation, attempts, vision, excusal, SOP forms

**EMIS-** EMIS form

**List-** list of all of your students

**New-** click to create a new IEP. When creating the second IEP for a student, it is recommended to create a new IEP instead of trying to modify the existing IEP

**Progress-** Progress report

**Print-** Go to the Print layout to print the IEP forms

**Amendments**  
 The 1<sup>st</sup> amendment will print on the Front page. Additional amendments will print on a second page. Use the Print Additional Amendments (2-10) button to print the page.

The Other Information box does not expand if you over fill the box.

- ✓ Data is automatically saved in a two step process. First it is stored in a memory cache on your computer and then written to the server after certain events (changing pages, changing students, creating a new IEP, closing the program). If you are disconnected from the server or your computer shuts down improperly before any of these events occur, you could lose data. To force data to be save to the server, use Ctrl + 3 (Windows) or Cmd + 3 (Mac). This option can also be found under File on the menubar. Clicking on the background of the screen can also initiate the data being saved to the server.
- ✓ To move from field to field use the Tab key. On single line fields the Return key will also work.
- ✓ The program spell checks as you type by underlining misspelled words in red. Right click a misspelled word to see a list of suggested words or to learn the word.
- ✓ To zoom in the screen press Shift + Ctrl + . (Win) or Shift + Cmd + . (Mac) To zoom out press Shift + Ctrl + , (Win) or Shift + Cmd + , (Mac). You can also use the magnify tool to do this
- ✓ Mouse over a button or icon to see a pop up tool tip telling you what the button does.

## Front Page (continue)

**District:** PSFE Docs

Doe, Joan  
 Jones, Joan  
 Sample, John  
 Smith, Billy

10/10/2009 - Gordon\_r - ID to 123456789  
 10/10/2009 - Gordon\_r - created

**Teacher/Case Manager**  
 Gordon\_r

Lock IEP     Archive IEP

School year IEP begins

**Set Additional Users**  
 Jones\_T  
 Williams\_S  
 Elliott\_D

(Check when finished with your part)

Elliott\_D  
 Gordon\_r  
 Jones\_T  
 Williams\_S

**Comments** Gordon\_r

Enter comments about this IEP that you want to share with the users for this IEP. This section does not print on an IEP

**Docs** ← This indicates that a document is attached to this student's IEP. Click Docs to go to the documents parts of the program. Documents are files that are attached to a student's IEP.

This list shows the students you have access privileges. Click the name to go to that student.

Click to hide this list from appearing. This is helpful if you are using a projector to conduct your IEP conference.

\*Click to **Lock** an IEP. A locked IEP can not be modified until it is unlocked. You must have IEP lock/unlock privileges to use this option.

**IEP Log**  
 This sections logs events in the IEP program. Events include:  
 •IEP creator  
 •Who viewed/edited the IEP  
 •Who created a progress report  
 •Who deleted a progress report  
 •Who deleted a goal page  
 •Who deleted an objective  
 •Who changed the student number  
 •Who locked an IEP  
 •Who archived an IEP

\*Click to **Archive** an IEP. This hides a student from being viewed in your list. Click the Unarchive button on the list to see archived students. You must have Archive privileges to use this option.

Select a year for this IEP. This is used for organization and does not print on the IEP.

\*Click your name when you are finished with your part of the IEP.

\*Click to reassign another user as the primary teacher/case manager for this IEP.

**\*Additional User**  
 This indicates the other users that have access to this IEP. Click the **Set Additional Users** button to add or delete users for this IEP. User can be added or deleted at anytime. Click the **Remove your name** button to remove your name from this IEP. You can also remove your name by clicking the **Set Additional Users** button.

\*indicates network only feature

- ✓ A user will continue to have access to an IEP as long as their user name is in the teacher/case manager field or additional user field. You must remove your name from both locations to no longer have access to the IEP.

## Goal Page

Click to go to the previous or next goal.

Click to create a new goal.

Progress Report

Click the red X to delete a goal. Goals will be renumbered after deleting a goal. You must have IEP Delete goal privileges to use this option.

Go to previous or next student

Enter the Present Levels for this goal. This section will roll onto multiple pages if needed. Click on the **Progress**, **Profile**, **ETR Sum**, and **ETR Evals** tabs to copy data from these sections into the Present Levels section.

Select a subject, grade and standard to see the Ohio content standards. Click the < insert the indicator into the Present Levels.

Content Standards

Subject Math Grade 1 Standard 2

1 Recognize and explain the need for

2

3

4 uniform size.

5 Estimate and measure lengths using non-standard and standard units; i.e., centimeters, inches and feet.

John Sample

Progress List Print

2 of 2 Create New Goal AREA: Math

6 PRESENT LEVEL OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PE

John can tell time to the hour on digital and analog (dial) timepieces.

Banks Progress Profile ETR Sum ETR Evals Services

Goal Bank List Obj. Bank List User Gordon\_r

Goal Topic math time New Goal

OBJ Topic Math time New Obj.

[name] will tell time on his digital watch to the XXX, XXX times out of XXX times when asked to tell time on his

[name] will tell time on a analog clock to the XXX, XXX times out of XXX times when asked to tell time on the

Goals/objectives can be easily stored or retrieved from the bank. The student's name and gender specific words can automatically insert into the goal/objective field. When storing goals, use masculine forms (he, him, his, and himself) and type [name] where you want the student's name inserted. You must type [name] exactly. Gender specific words will automatically be changed to feminine forms (she, her, herself) for female students if Female is selected on the front page. Bank can be organized by the topics. You can view other users banks by selecting their user name in the User field. A user cannot add or delete goals/objectives from another user's bank but they can use a goal/objective from another user's bank. Click the red triangle button to transfer the goal/objective from the bank into the IEP. If you hold down the Shift key when click the transfer button in the objective bank, all of the objectives under the topic will be inserted into the IEP.

### Adding a goal or objective to the bank

1. Select a topic from the **Topic** field or type a new topic in the Topic field. It is recommended to use very specific topics when entering a topic (i.e., math measurement instead of just math). Topics will automatically sort in alphabetical order when you click in the **Topic** field. Use topics that make is easy to retrieve what you want.
2. Click the **New Goal** or **New Obj** button to create a blank text field to enter a goal or objective into the bank.
3. Click **Add Goal to Bank** to transfer an entered goal from the Goal field into the bank. When using this option make sure you have the appropriate Topic selected or entered before clicking this button. Click the Add Objective to Bank button to add an objective from the IEP into the objective bank. Select an objective first before clicking this button
4. It is recommended to not store more than six goals/objectives under any topic because you will need to scroll to find the goal/objective if you have more than six.
5. If you need to modify the topic for a goal or objective in the bank click on the **Goal Bank List** or **Obj Bank List** button to go to the list. On the list you can change the topic name assigned to a goal or objective. You can also print your banks from the list.

### Deleting a goal or objective from the bank

1. Click on the goal or objective you want to delete
2. Click on the icon of the trash can to delete the item
3. If you delete all of the goals/objectives underneath the topic, the topic will be removed from the pop up list of topics

- ✓ Over time you might have a lot of topics in your topic's list. This list will always be in alphabetical order. To easily navigate in this pop up list start type the item you want and the list will narrow down by the letters you type (i.e., type a M and the list will narrow down to items that begin with a M). Type more letters to further narrow the list. This feature works throughout the program.

## Goal Page (continue)

Click to go to the previous or next goal.

Click to create a new goal.

Click to transfer the goal into the bank.

Click to print the current goal.

2 of 2 Create New Goal MEASURABLE ANNUAL GOAL Add Goal to Bank METHOD(S)

John will tell time on a analog clock to the half hour, 3 times out of 4 times when asked to tell time on the clock.

Enter the goal here. You can create as many goals as you need.

METHOD(S)  
Observation, Checklists, Work Samples

Print this Goal

Click a goal to go to that goal 2

1 John will tell time on his digital watch to the half hour, 3 times out of 4 times

2 John will tell time on a analog clock to the half hour, 3 times out of 4 times

METHOD FOR MEASURING THE CHILD'S PROGRESS TOWARDS ANNUAL GOAL  
(click a letter or method to insert into the Methods field)

a. Curriculum  
b. Portfolios  
c. Observation  
d. Anecdotal F

Click on a method or the letter to insert the method or letter into the methods field

Work Samples  
inventories  
rubrics

User Defined Methods  
month assessment  
observation, checklists, work samples  
graphs  
(click button to insert)

John Sample

MEASURABLE OBJECTIVES Default for new Goals

NUM OBJECTIVE

2.1 Sampl

Select either Objectives or Benchmarks.

Click on an objective and then click this button to add the objective to the bank.

Click the X to delete an objective.

Enter up to 7 objectives.

Enter three custom methods and then click the gray button to insert the method into the Methods field.

METHOD AND FREQUENCY FOR REPORTING THE CHILD'S PROGRESS TO PARENTS

Written Report  
 Email  
 Phone call

Reported every 9 weeks Default weeks for new IEPs 9

Graph

Click to create a graph.

Enter a default value for new goals.

## Progress Report

Go to the 5 different Progress Reports

Print or PDF feedback forms

Print or PDF Progress Report

IEP Nar 4 C 6 C 8 C 9 C D Feedback W Feedback

Start: 10/10/09 End: 10/9/2010

Student John Sample Teachers

10-15-2009 1-15-2010 3-30-2010 6-1-2010

Return to IEP Writer

Click to enter Preferences.

Add a row to the progress report.

Delete a progress report.

Enter column headings.

Click X to delete a row.

1 John will tell time on his digital watch to the half hour, 3 times out of 4 times when asked to tell time on his watch.

2 John will tell time on a analog hour, 3 times out of 4 times when asked to tell time on the clock.

1  currently working on this goal  
2  mastered  
3  not introduced  
4  slow progress

Check a box and click the number to insert item into the corresponding column.

Click to temporarily omit a row.

Print Fixed Length  
Hide Objectives  
Show Omitted/Hidden

A variety of progress reports can be generated. A four column, six column, eight column, nine column and narrative report can be created. Items can be permanently deleted or temporarily removed (Omit) from the progress report. New items can also be added to the progress report. A daily (D) and nine weeks (W) feedback form can be printed from the progress report. The column headings and teacher names can be edited by clicking in these field and editing the text. Checkboxes can be used to quick enter text into the progress text fields. Click on the **Pref** button to set values for the checkboxes, enter default column headings and a create key for the feedback forms. Progress fields can be overfilled. The progress report will adjust to the amount of text entered into the field.

To generate a progress report, click on the Progress button in the IEP. You should only create a progress report after you complete all of the goals and objectives. If you generate the report before completing the goals/objectives, any goal or objective created or edited after the report is generated will not be on the progress report. You can delete the progress report and regenerate it with the new goals and objectives or you can click the Add button to add an item to an existing progress report. Be careful to not delete a progress that contains data in the progress columns. Once a report has been generated, clicking on the Progress button will take you directly to the student's progress report.

### Sample Weekly (W) Feedback Form

Student John Sample  
 Teachers \_\_\_\_\_  
 Date \_\_\_\_\_

### IEP Feedback Sheet

Rating Key  
 1- not introduced  
 2- slow progress  
 3- adequate progress  
 4- mastered

| Goal/Objective  | Ratings |   |   |   |   |   |   |   |   | Comments |
|---|---------|---|---|---|---|---|---|---|---|----------|
|   | 1       | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |          |
| 1 John will tell time on his digital watch to the half hour, 3 times out of 4 times when asked to tell time on his watch. |         |   |   |   |   |   |   |   |   |          |
| 2 John will tell time on a analog clock to the half hour, 3 times out of 4 times when asked to tell time on the clock.    |         |   |   |   |   |   |   |   |   |          |
| 2.1 Sample objective 1  |         |   |   |   |   |   |   |   |   |          |

### Sample Daily (D) Feedback Form

Student John Sample  
 Teachers \_\_\_\_\_  
 Date \_\_\_\_\_

### IEP Feedback Sheet

Rating Key  
 1- not introduced  
 2- slow progress  
 3- adequate progress  
 4- mastered

| Goal/Objective  | Ratings |   |   |    |   |   |   |   |    |   |   |   |   |    |   |
|---|---------|---|---|----|---|---|---|---|----|---|---|---|---|----|---|
|   | M       | T | W | TH | F | M | T | W | TH | F | M | T | W | TH | F |
| 1 John will tell time on his digital watch to the half hour, 3 times out of 4 times when asked to tell time on his watch. |         |   |   |    |   |   |   |   |    |   |   |   |   |    |   |
| 2 John will tell time on a analog clock to the half hour, 3 times out of 4 times when asked to tell time on the clock.    |         |   |   |    |   |   |   |   |    |   |   |   |   |    |   |
| 2.1 Sample objective 1  |         |   |   |    |   |   |   |   |    |   |   |   |   |    |   |

### Services Page

Instruction
Related Services
Assistive Tech
Accommodations
Modifications
Support
Medical
 Check when complete

| SPECIALLY DESIGNED INSTRUCTION      | GOAL(s) Addressed                          | PROVIDER TITLE              | LOCATION OF SERVICE |
|-------------------------------------|--|-----------------------------|---------------------|
| Consultation                        | 1, 2                                       | Speech Language Pathologist | Speech room         |
| Begin: 10/10/2009    End: 10/9/2010 | Amount of Time: 10 minutes of Consultation |                             | Frequency: Weekly   |
| Begin:                      End:    | Amount of Time:                            |                             | Frequency:          |

**Specially Designed Instructions** (Enter values for pop up list)

Direct Instruction

Small group instruction

Consultation

Enter values for pop up list for all services

| Providers               | Amount of Time             | Location                    | Frequency       |
|-------------------------|----------------------------|-----------------------------|-----------------|
| Speech Language         | 40 minutes                 | Resource Room               | 5 days per week |
| Occupational Therapist  | 10 minutes of Consultation | General Education Classroom | Weekly          |
| Intervention Specialist | 100 minutes per month      | Designated Therapy area     | Daily           |
| Physical Therapist      | 120 minutes monthly        | Speech room                 | Monthly         |
| General Ed Teacher      | 50 min per week            |                             |                 |

Enter values for pop up list that can be used to easily complete the services section without needing to type.

The services page can be completed completely through pop up lists. Enter values into the pop up list fields. This will create pop up lists for all of the fields on the services field. You can create as many services as needed. To delete a service click on the service and then the trash can. The services can also be entered on the goal page layout by clicking on the Services tab.

✓ To select multiple items in a pop up list, hold down the Ctrl key (Win) or Cmd key (Mac) to select multiple items. Then click the Return key to enter the items. This feature works throughout the program.

# Print Layout

Select the pages to print and then click the **Print IEP** button to print the selected pages. The Print Dialog boxes are normally suppressed. To view the Print boxes hold down the Shift key when clicking the **Print IEP** button. You can do this to select a different printer or to change printer settings. This option also works in other parts of the program. If you have FileMaker Pro 9.0 or greater you can use the **PDF IEP** option to create a single PDF file of the IEP. This is a great way to preview the IEP. Mac users can use the Preview option in the Print Dialog box to easily preview pages.

- Print IEP at a Glance**- Prints a one page summary of the Goals, Methods, Objectives, Test Accommodations, Related Services, Accommodations and Modifications.
- Print Present Levels**- Prints a summary of all of the Present Levels sections.
- Print Accommodations**- Prints a list of your students with the accommodations/modifications from the testing and services pages

Use this section to print the IEP as a Services Plan

You can Print all current Testing, IEP at a Glances and Progress Reports with these buttons

Use this section to create individual PDF files of these pages. This requires FileMaker 8.0 or greater

Use this section to print envelopes

# Student List

|   |                |    |          |         |       |          |                 |          |          |           |                           |
|---|----------------|----|----------|---------|-------|----------|-----------------|----------|----------|-----------|---------------------------|
| <input type="checkbox"/> Sort list at start up    Find District Only<br><input type="checkbox"/> Unsort    Find Expired IEPs<br>Find Active IEPs<br>Delete IEP List |                |    |          |         |       |          |                 |          |          |           |                           |
| Extra Docs EMIS Progress All Find Unarchive Omit Delete New Print   |                |    |          |         |       |          |                 |          |          |           |                           |
| <input type="checkbox"/> Lock<br><input type="checkbox"/> Arch  | Student 1 of 2 | Gr | Teacher  | Year    | Goals | Meeting  | Effective Dates |          | Next IEP | Student # | <Click a headings to sort |
| <input type="checkbox"/>  | Joan Doe       | 04 | Gordon_R | 2009-10 | 4     | 10/11/09 | 10/11/09        | 10/10/10 | 10/10/10 | 12345     |                           |
| <input type="checkbox"/>  | John Sample    | 05 | Gordon_r | 2009-10 | 2     | 10/10/09 | 10/10/09        | 10/09/10 | 10/09/10 | 123456789 | Docs                      |

The list will display all of the students you have access to their IEP. This will include the students were you are selected as the teacher or additional user. To sort the list, click on a list column heading. You can also check the **Sort list at start up** option to automatically sort the list when you open the program. Click on a student and then click on a navigation button to go to an IEP page.

**F thru 14-** click to go to the page

**Extra-** invitation, prior written notice, manifestation, attempts, vision, excusal, SOP forms

**Docs-** Go to documents to store or retrieve documents stored for this student

**EMIS-** Go to EMIS form

**Progress-** Go to the Progress Report

**All-** Find all of the students that you have access

**Find-** Find a student by entering a search criteria

**Unarchive-** Click to show all of the archived students

**Omit-** Click to temporarily remove a student from the list

**Delete-** Select a student and click this button to delete an IEP from the program

**New-** Click to create a new IEP.

**Print-** Go to the Print layout to print the IEP forms. Hold down the Shift key and click this button to print the list

**Unsort-** click to unsort the list. The older IEPs will be at the top of the list and the newest IEP will be at the bottom

**Find District Only-** This is a multi-district only feature. It finds students for their log in district

**Find Expired IEPs-** Finds students that have a meeting date greater than one year old or an expired effective date

**Find Active IEPs-** Finds students that have a meeting date less than a year old or within the effective dates

**Delete IEP List-** This option will delete all of the students on the list. **Use this option very carefully.** Network users will need Delete privileges to use this option. Very few users should have this option enabled.

 Click to narrow the list to only students that you are listed as the teacher

 Click to view all of the students where you are the teacher or additional user

## New Student Layout (network only)

**Create New IEP**

First Name:  Last Name:  Student Number:

(Enter the first name, last name and student number and click Create IEP)

(Enter a student number and press Tab or click out of the student number field to see a history of IEP for that student number)

| Created  | Student  | Teacher   | Meeting | Effective dates |
|----------|----------|-----------|---------|-----------------|
| 10/07/09 | John Doe | Elliott_D |         | to              |

Previous IEPs for the entered student number will display in this box.

**Select Default Team Members**

Select Additional Users for the new IEP Building/District:  Teacher:

Admin  
 Elliott\_D  
 Gordon\_R  
 Jones\_T  
 sample  
 Smith\_J  
 Williams\_S

Select team members for this IEP. This will give access to these users.

Select All to see all IEP users or select a building/district to narrow the list of users.

Select the primary teacher for this IEP. This will automatically default to the user that created the IEP.

Enter default team members that can be inserted with the **Insert default team members** button.

**Insert default team members-** Click to insert the default teams members as additional users

**Email team members-** Click to send an email notice to the additional users. This option does not work with web mail accounts and the email addresses for the users need to be entered in the User Accounts section of the program.

**Create IEP-** click to create the IEP

**Cancel-** click to cancel creating a new IEP and to return to the list

Additional users can be changed or added after the IEP is created by clicking on the Set Additional Users button on the Front page.



**IEP Writer Pro Menubar**

Create a new IEP  
 Print an IEP  
 Import an IEP  
 Export an IEP  
 Force data to save to the server. Highly recommend using this option in areas you spend a lot of time entering data. Ctrl + 3 (Win) will also run this option  
 Can be used to create district specific forms

Use these options to format text. The Condense option under Style is very helpful when you need a little more space than what the field allows.

Find/Replace - Not case sensitive  
 Find/Replace - Not case sensitive/partial word  
 Find/Replace - Case sensitive  
 Find/Replace - Case sensitive/partial word  
 Check Selection...  
 Check Record...  
 Check All...  
 Correct Word... (⇧⌘Y)  
 Select Dictionaries...  
 Edit User Dictionary...

The **Find/Replace** option can be used to find a word or partial word with another word. This option can be case or not case sensitive

The **Spelling** options can be used to spell check. The program also automatically underlines misspelled words. Select Edit User Dictionary ... to add words to the dictionary.

The **Preferences** can be used to change the User Name in the accounts/password box.

Create a new IEP  
 Create a new IEP with duplicated demographic data from the current IEP.

Select to create a new window view of the layout you are currently on. This will allow you to view two different layouts of the IEP.  
 Select New\_Special\_Ed to return to the Welcome screen. After logging into both the IEP and ETR you can switch between the IEP and ETR by select IEP\_writer or ETR\_writer