The DoDEA-Aspen Special Education Management System

User Guide

The DoDEA Special Education User Guide is designed to assist all special education personnel in the management of confidential student information. This guide explains how personnel can:

- Enroll students in the special education program,
- Create assessment plans, eligibility reports and determine eligibility
- Use workflow checklists as a guide through the special education process,
- Develop initial Individual Education Programs (IEPs) from transfers or initial referrals,
- Update IEPs including modifications, annual, and Triennial reviews, or
- Provide special education services to students.

Account Management / Access

The District Student Information System – Educational Technologist (SIS-ET) is responsible for establishing and managing Aspen-SPED user accounts. Local school personnel should contact the District Office to request an account to be established / modified with the appropriate user role. The roles are:

- **Case Study Committee Chair (CSC-Chair)**
  - New Referrals
  - Incoming DoDEA-IEPs
  - Incoming Non-DoDEA IEPs
  - Creating Queries
  - Reports

- **Service Provider**
  - Annual review
  - Triennial review
  - Modification
  - Progress Report
  - Creating Queries
  - Reports

- **CSC Clerk / Assessor Clerk**
  - Data entry: IEP, eligibility, progress reports
  - Generate invitations
  - Print all documents
Read all documents
Creating Queries
Reports

District / Area SPED
View all documents
Creating Queries
Reports
Create Progress Reports

Administrator
Read all access
Creating Queries
Reports
Using the DoDEA Aspen-SPED Module

Aspen is a complete data management tool that is flexible enough to help you:

- Use a checklist to track steps as they are completed in the process.
- Stay in compliance with DoDEA special education policy.
- Create Aspen-SPED forms which look and print like our current DoDEA standard forms.
- Query and display data across students' IEPs and forms.
- Access reports with student specific information such as service delivery or accommodations content.

In the Special Education view (refer back to changing views section), there frequently is more than one way to complete a task, but users should complete tasks, whenever possible, through the *Workflow*, or checklist, that automatically begins when you enroll a student in Special Education or create a draft IEP. Each workflow guides you through the steps to complete a process. DoDEA Aspen-SPED has four main processes:

1. Enroll in Special Education Process
   - Initial Referral workflow: Initially referring a student to and enrolling the student in the special education program.
   - Transfer from Non-DoDEA workflow: Transferring a student with an active IEP from a Non-DoDEA district.

2. Renewing IEP Process
   - Review IEP (Annual): Renewing a completed IEP, usually after the first year.
   - Re-evaluation (Triennial): Re-evaluating an IEP on a predefined schedule, usually every three years, to determine continued eligibility for special education services.
   - Transfer DoDEA: Transfer of data for a student coming from another DoDEA school with information already available in Aspen.

3. Amend IEP Process
   - Modification (Amendment IEP): Revising and modifying an active IEP including students needing additional assessments after eligibility.
4. Progress Report Process
   o Documenting student progress for goals identified in a completed active IEP.

To create workflows:

1. Click on the IEP Tab.

2. Click Options and indicate the desired workflow. Specific details for each workflow are listed later in this guide.

The different workflows may be accessed by clicking either:
   - Enroll in Special Education
   - Renew IEP
   - Amend IEP
   - Prepare Progress Reports

Special Education Processes

The flowchart located on the next page identifies Aspen's functionality and the workflow process. The major IEP functions are listed in bold at the top of the page in green and the workflows for those operations are listed below each of the 4 phases. The following is a general breakdown of the major steps most users complete in Aspen SPED:

- Enrolling a student into the Special Education view
- Transferring data for students coming from another DoDEA school
- Creating an Assessment plan or eligibility report for an initial or re-evaluation
- Creating and implementing an IEP
- Reviewing and renewing the IEP
- Amending (Modifying) an IEP
- Preparing progress reports
In addition to the school enrollment status, a student that is enrolled in the Special Education view also has a special education status. As you update information on a student's special education workflow, the system automatically updates the student's special education status.

To see a student’s status, click on the Student tab and the special Ed Status is displayed for all students.  

**The four student special education statuses are:**

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Referred</strong></td>
<td></td>
</tr>
</tbody>
</table>
- The student is enrolled in special education, but does not have an active IEP. The student has a draft IEP currently in progress.  
- A teacher or parent has concerns about a student and student will possibly go through the testing process  
- When a student has a Referred status, special education users can edit the student's draft IEP.  
- The student is in the process of being considered for special education services, but the IEP is not active. |
| **Ineligible** |  
- The student has been referred and tested, but has been determined to be not eligible for special education services at this time. |
| **Active** |  
- The student has gone through the testing process and is eligible for special education services.  
- The student has an active IEP and is receiving services. |
| **Exited (Inactive)** |  
- The student does not have an active IEP. The student might have exited the special education process because the student withdrew from the school, graduated, aged out, or the student or parent requested the student no longer receive special education services. |
### IEP Status

Although a student can have only one active IEP, Aspen-SPED maintains a historical record of all student IEPs to include those previously completed.

#### The four IEP statuses are:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Draft</strong></td>
<td>An IEP that is currently in the process of being completed and is not active.</td>
</tr>
<tr>
<td><strong>(Amendment Draft)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Active</strong></td>
<td>An IEP that has been signed and implemented and is being used by teachers. This is considered “complete” or “locked.”</td>
</tr>
<tr>
<td><strong>Previous</strong></td>
<td>A former IEP that is no longer active.</td>
</tr>
<tr>
<td><strong>Discarded</strong></td>
<td>An IEP that had been worked on, was saved, but was not completed. It may have been started by mistake for the wrong student or the parents decided to not implement it.</td>
</tr>
</tbody>
</table>

**Note:** District personnel must override the IEP status to assign it the **Discarded** status if there is no workflow connected to the IEP.
Filter Which Students or IEPs Display on a List Page

When you are using the Student or IEP tab in the Special Education view, the Filter menu changes which students or IEPs appear on the list page. Use the following table to determine what to select on the Filter menu:

<table>
<thead>
<tr>
<th>Filter on Student tab</th>
<th>Filter on IEP tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>The status on the Student tab refers to the student's special education status.</td>
<td>The status on IEP tab refers to the status of the IEP.</td>
</tr>
</tbody>
</table>

**My Current Cases:** (default view for most users) Students for whom you currently:
- serve as the case manager (liaison) or a service provider, or
- are linked to through a user-defined field such as CSC chair or assessor field. See your system administrator for more details.

**My Cases:** Students for whom you currently or previously:
- served as the case manager (liaison) or a service provider for, or
- linked to through a user-defined field created by your school or district. See your system administrator for more details.

**Active:** Students who are active in the Special Education view.

**Not Eligible:** Students who are not eligible for special education.

**Referred:** Students who are referred to the Special Education view.

**Exited:** Students who are no longer receiving special education services and are not on an active IEP.

**All Records:** All current and former students in the Special Education view. These are all students with a special education need.

**Active IEPs:** IEPs that are active in the Special Education view.

**Draft IEPs:** IEPs of students who are in the process of being prepared and are not active.

**Previous IEPs:** IEPs which are no longer active.

**All Records:** All Active and Previous IEPs in the Special Education view.
### Filter on Student tab
The status on the **Student** tab refers to the student’s special education status.

### Filter on IEP tab
The status on IEP tab refers to the status of the IEP.

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## IEP Types

There are four types of IEPs in DoDEA Aspen-SPED. The *type* is not edited by the user, but is automatically updated by the system as the workflow progresses.

### The four Active IEP types are:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initial</strong></td>
<td>The first IEP drafted for a student.</td>
</tr>
<tr>
<td><strong>Review (Annual)</strong></td>
<td>An IEP that had been active, and is now up for an Annual review. Minimally occurs one year after the IEP was implemented.</td>
</tr>
<tr>
<td><strong>Reevaluation (Triennial)</strong></td>
<td>An IEP that is being re-evaluated to determine if the student has met the goals and continues to be eligible for specialized services. This occurs every three years.</td>
</tr>
<tr>
<td><strong>Amendment (Modification)</strong></td>
<td>An IEP that is being modified for any number of reasons. You may need to increase or decrease services, add goals/modifications etc.</td>
</tr>
</tbody>
</table>

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You may also view Draft IEP’s and previously written IEPs by accessing them through the filter if your rights allow access:
Using Special Education Workflows

For each step in the special education process, a workflow, or checklist of steps, is completed to enroll or renew a student in special education. In Aspen-SPED, steps are referred to as phases.

When you enroll or renew a student in the DoDEA Aspen-SPED Program, a workflow is started which automatically is associated with the specific event. For directions for starting workflows, refer to the specific workflow instructions in this guide (i.e. Initial, Annual, Amend, Transfer).

To complete an established Special Education Workflow:

1. Access the Special Education view.

2. Click the IEP top tab.

3. Click the FILTER if necessary and choose My Current Cases or Draft IEPs.

   NOTE: Unfinished workflows are in “draft” form and will not be found under the Active IEPs filter. (See below)
4. Select the IEP to complete and check the box beside the student’s name.

Note: Depending on the filter chosen (My Current Cases specifically), an individual student may have several entries. Choose the workflow that says “Draft” to get to the workflow currently in process of being updated.

5. Click the Workflows side tab.

6. Select the workflow you want to update, and click the blue link under Workflow Definition > Name. The checklist for that workflow appears.

The following example shows an Initial Referral IEP workflow. The workflow will show where the user stopped and where to begin the next phase of the workflow. The system automatically highlights the next phase in the workflow to be completed:
7. Click the **blue link** to complete the next phase. Each phase will ask the user to complete a unique step in the workflow process. For some steps, the user might enter a date. For other steps, the user might complete a form. Many pop-up windows actually contain multiple sets of data to be completed (denoted by tabs at the top of the screen). **Do not “save”** after each tab. Saving will cause the pop-up window to close and require the user to edit that phase of the workflow later. Complete all tabs **then save** when completely finished.

**NOTE:** For instructions on each phase, refer to the specific workflow instructions in this guide.

8. Depending on the phase you complete, you might do the following:
   - For phases with multiple outcomes Aspen will prompt the user to select the outcome. The user clicks the appropriate choice within the phase.
example, if **Accept** is chosen, the workflow will be complete and the IEP will become Active. If any other option is chosen, the system will start new phases in the same workflow depending on the CSC decision. If the CSC needs more phases, continue using the same workflow until the CSC arrives at a final decision and the IEP is accepted. (See below).

Other Information Useful for Workflow Navigation:

1. In the workflow checklist, you can **Edit** or **Print** the form. Users should use the **Edit** function to re-enter and change any data for that step:

   ![Workflow Checklist](image)

   **Note:** If you make a mistake or need to add additional information after a phase is complete, attempt to edit the information first (via the **Edit** button). However, if the phase needs to be deleted, click the checkmark in front of the phase to uncheck the phase and allow new information to be entered.

2. Embedded Dropdown Screens and Top Tabs in Workflows

   When completing some parts of a workflow, there will be multiple screens embedded within a workflow. These screens can be found by clicking the drop down menu at the top of the screen to access the embedded, or previous screens. These screens will appear multiple times to complete a particular phase of the workflow.
NOTE: On the “Schedule or Convene Referral Review Meeting” phases pop-up box, the General and Attendance Top Tabs should be completed before the meeting to record general information about the meeting and generate invitation letters. When the meeting is convened, the Attendance and Minutes Top Tabs should be used to document participants’ attendance and record minutes for the meeting. During meetings, the assigned recorder should move between the Meeting and Referral drop down screens to accurately record student data and notes from the meeting. Each dropdown screen has information for different documents that will become a part of the student’s confidential record.

Embedded screens also appear in other workflows to complete a phase of the IEP process (i.e. Complete Assessments, “Eligibility” workflows, and “IEP” workflows) via drop down menus. These drop downs may be used to develop an eligibility report or to print the notice of insufficient information during a transfer meeting or to develop or modify the assessment plan during a meeting.

3. After several workflow steps are completed, a date in the Date Due column might appear. These dates are determined by the DoDEA special education timeline for each step in the CSC process:

Timeline guidance

<table>
<thead>
<tr>
<th>PROCESSING THE REFERRAL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FROM</strong></td>
</tr>
<tr>
<td>Acceptance of Referral</td>
</tr>
<tr>
<td>Permission to Assess</td>
</tr>
<tr>
<td>Completion of Assessment</td>
</tr>
</tbody>
</table>
Eligibility Meeting → IEP Meeting = 10 School Days

PROCESSING A TRANSFER STUDENT

<table>
<thead>
<tr>
<th>FROM</th>
<th>TO</th>
<th>TIME-LINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt of Incoming Records by CSC</td>
<td>Incoming Records Review Meeting</td>
<td>15 School Days</td>
</tr>
</tbody>
</table>

A warning threshold has been set up, ⚠ and warns you that there are only a few days before the phase needs to be completed. This warning disappears after the phase is completed or the due date is passed.

If the date due has passed for a phase, 🚫 indicates that the IEP or a phase in the workflow process is out of compliance. The user can continue to follow the workflow, but the icon remains. Hover over the icon to display how many days the phase is overdue. Once all phases are completed in the checklist, the system implements the student’s new active IEP.

**Note:** The system creates a draft IEP as soon as you initiate a workflow. Throughout the workflow process, the system allows the user to continue developing the IEP.

If IEP is Accepted during the last step of the workflow this signifies that the process is complete and the draft IEP is now implemented. At this time, the current active IEP, if any, is changed to **Previous**, and the draft IEP becomes **Active**.

If a student is deemed not eligible to receive special education services on an Initial Referral workflow, the system changes the status of the draft IEP to **Discarded**.

If a student is found no longer eligible on a Re-evaluation workflow, the system changes the status of the active IEP to **Previous** and the status of the draft IEP to **Discarded**.
Accessing / Printing Forms

Forms may be printed in various locations in Aspen-Sped. Some forms may be printed directly from the phase in the workflow (see Print \[\text{Print}\] on the workflow - this is the preferred method). All forms can also be accessed from the Forms side tab for an individual student. For example, the user must select which workflow to get to the correct forms. If the user wants to print the active IEP, choose the active workflow. If the user wants to print a previous or draft IEP, choose the previous workflow in which the IEP was created or the current draft workflow.

Some necessary and required forms are located outside of the specific workflow (i.e. Individual Transition Plan, Transfer of Rights, Vision and Hearing Screening, Administrative Data Sheet). To access needed forms that are not within the workflow, the user should access the forms side tab.

Accessing the Forms Tab:
The forms tab can be accessed from the IEP tab.

Once on the IEP tab, select the filter (i.e. My Current Cases, Active IEPs, or Draft IEPs)

Choose the specific student and click the \[\text{\surd}\] in front of the student’s name, next click Forms in the side tabs.
To complete a new form from the Forms Manager, click on the word “New” under the specific form.

A pop-up window will appear. Complete or edit any necessary information on the form and save.

Users can then print the form by accessing the Forms tab and clicking the print icon. Once a form is created, it will be referenced by the date created, NOT the date of the meeting or acceptance of IEP. Additionally, users can also access any forms created within the workflow from the forms tab. However, forms completed in the Forms tab will not appear in the Workflows.

**Note:** You can also use the Forms side-tab on the IEP tab to print copies of forms for a student’s IEP, print blank copies of a form, and view the dates a form was printed or generated for a student’s IEP.
**CSC Meetings**

**Scheduling Meetings**

<table>
<thead>
<tr>
<th>Schedule and hold meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Print invitations</td>
</tr>
<tr>
<td>• Take meeting attendance</td>
</tr>
</tbody>
</table>

**Scheduling and Holding Meetings**

Within the schedule and convene meeting phases, you might:

- Schedule meetings with the parents and team members.
- Print meeting invitations.
- Hold meetings take attendance and write minutes at the meetings.

**Schedule Meetings**

Most workflows include a step to schedule a meeting between parents and team members to help track a student’s progress. Scheduling the meetings through the workflow allows you to print invitations in Aspen-SPED, track when the meetings are held, take attendance at the meetings and write the meeting minutes.

1. Log on to the Special Education view.
2. Click the **IEP** tab.
3. Do one of the following:
Click the **Workflows** side-tab, and click the workflow you are using for a particular student. Click the **Schedule** meeting phase name.

Click on **Forms** side-tab, and click **Meeting-New**. Use this option when a meeting needs to occur outside the scope of a workflow—example: to discuss a student’s progress or parent concerns.

4. A pop up window will appear. Complete the information (See screen shot below):

   A. Choose the meeting purpose from the dropdown menu. Note: Only one reason can be chosen.

   B. Fill in the meeting date. (Helpful hint: Input as a six digit number 112211 and Aspen will automatically convert to 11/22/2011).

   C. Select the time of meeting. (Helpful hint: Input as three to four digit number and Aspen will automatically convert to standard time (i.e. 130 will be converted to 1:30 p.m.)).

   D. Type in the location of the meeting.

   E. Anything typed into the details section **will not print** on the final invitation but should auto populate from the reason.

   F. Put in the first notice date. (Helpful hint: Input as a six digit number 112211 and Aspen will automatically convert to 11/22/2011).

   G. Put in the second or third notice date (if applicable).

   H. If second or third notice date is used, selecting “final date” will make the last notice date print on the meeting invitation.

   I. Only select “Final Date” if multiple dates are entered into this form. **If only first notice date is entered, do not select final date.**

   J. Click **Save**.

   K. **After parents have indicated response**, return to form and click parent reponse.

   L. Enter parent signature date.

   M. Click **Save**.
Printing Meeting Invitations

Most workflows allow you to easily print meeting invitations to send to parents and team members. You can also print invitations through the Forms side tab.

**To print meeting invitations:**

1. Log on to the Special Education view.
2. Click the IEP tab.
3. There are two options for printing invitations:

A. To print from the Workflow:

   1. Click **Print icon** next to the Schedule Meeting phase.
   2. Click the **Report** drop-down to select the format of the invitation you would like to print.

      **Note:** Aspen automatically defaults to Meeting Minutes. Choose the drop-down and select Meeting Notice.

   3. Click **Run**.
B. To print from the Forms Tab:
   1. Click **Print** icon next to blue date.
   2. Click the **Report** drop-down to select the format of the invitation you would like to print. Note: Aspen automatically defaults to Meeting Minutes. Choose the dropdown and select Meeting Notice.
   3. Click **Run**.

**Convening Meeting and Taking Attendance**

All workflows include a phase to hold a meeting between parents and team members, and also take attendance at the meeting.

**Convening the meeting:**

1. Log on to the Special Education view.
2. Click the **IEP** tab.
3. Access to the meeting tasks is available via the workflow or Forms Manager. However, **It is highly recommended the user access via the workflow:**
   - Option 1: Click the **Workflows** side-tab, and click workflow you are using. Click the appropriate **Convene meeting** phase.
   - Option 2: Click the **Forms** side-tab. Once on the Forms tab, find Meetings and click the appropriate meeting.

Note: Meetings are listed by the date invitation was created, not the actual meeting date.
4. A pop-up window will appear. It has three top tabs to navigate. Remember to complete all tabs and save. Hitting save will cause the pop-up window to close. To navigate through the tabs, simply click on the top of the tab.

5. The general tab refers to the meeting information and was completed in the Schedule Meeting phase.

6. On the attendance tab, a list of people who were invited to the meeting appears.

7. Click the appropriate checkbox to complete the following actions:

<table>
<thead>
<tr>
<th>Click the checkbox for..</th>
<th>To complete the following action....</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invited?</td>
<td>Include this person on the meeting invitation. The person will print on the invitation if invited is clicked. To remove a person from the invitation, unclick invited (or delete from team using the edit icon).</td>
</tr>
<tr>
<td>Excused?</td>
<td>Indicate this person is excused from the meeting.</td>
</tr>
<tr>
<td>Print Invitation?</td>
<td>Print an invitation for this person.</td>
</tr>
</tbody>
</table>
8. On the Minutes tab, the user will enter the CSC minutes from the meeting.

**NOTE:** Draft minutes reflecting information such as background or previous CSC outcomes may be entered prior to the meeting to facilitate quicker and easier minutes.

9. Indicate if the parents have been informed of rights/responsibilities and provided copy of rights by choosing “yes” or “no” from the drop down menu.

10. Minutes can be directly typed into the Summary of Discussion/Deliberation text box. To access spell check, expand the window by selecting the icon in the upper left hand corner of the minutes field.
11. To activate spell check, click the icon on the bottom right of the screen. Any errors are highlighted in yellow. To correct a misspelling, left click on the yellow highlighted word and choose from the drop down menu. If the correct choice is not listed in the dropdown, simply retype or correct the word by hand. Adding to the dictionary is also an option if it is a routine word.

12. After spell check is complete, hit OK. Note: Hitting OK does not save the minutes. It returns to the minutes screen.

13. Once minutes are finished, hit Save. The pop up window will now close. However, if additional information needs to be included you may reopen the minutes by clicking on the edit icon in the workflow phase.

14. To print the minutes, hit the print icon next to the Convene Meeting phase in the workflow.

15. Aspen automatically defaults to print Meeting Minutes.

16. Click Run. A PDF of the minutes will appear in a separate pop-up window. Print the minutes from the PDF commands.
To enroll a student with an initial referral in the special education program:

1. Log on to the Aspen system—Special Education view.
2. Click the IEP tab.
3. Under the Options menu, click **Enroll in Special Education**. Step 1 of the Special Education Enrollment wizard appears.

**Enrolling a Student for the FIRST time in Special Education**

*Note:* Before you enroll a student in the Special Education view, the student must be enrolled in your school.

The special education process begins when a parent or teacher refers a student to the DoDEA Case Study Committee (CSC).

The **CSC-Chair** begins the CSC Initial Referral process in Aspen by beginning the “Enroll in Special Education” process.
4. From the Special Education Enrollment wizard (Step 1 of 3) select the workflow for an Initial Referral (See Below.)

5. At the Date field, type the date, or click \(\text{Date}\) to select the date the student is enrolled. (This is the date that you begin the workflow in Aspen-SPED.) (Helpful hint: Input as a six digit number 112211 and Aspen will automatically convert to 11/22/2011)

6. At the Student field, click \(\text{Student}\) and select the student to enroll, and click \text{OK}.  


7. Click **Next**. Step 2 of the Special Education Enrollment wizard appears. **This step is specific for Initial Referrals.** (See Below.)

Note: This is the CSC referral form received from the referring team or individual and contains 2 pages. It is very important to complete both pages of the referral. The second page contains the field for entering the Case manager’s name. It is important for the CSC chair enter their name here. This is what gives them access to the initial referral workflow upon completion of the wizard and can be edited during the referral meeting if needed.
8. Complete the remaining fields in the wizard for pages one and two. Then click **Next**.

9. At step 3 of the wizard, confirm the information you've entered, and do one of the following:
   - Click **Back** to fix any errors.
• Click **Finish** to complete the student’s enrollment.
• Click **Cancel** to cancel the student’s enrollment.

The system enrolls the student in the special education program and gives the student an **Initial Referral** workflow in draft status. In addition, their special education status will now show as Referred in the Student Tab. Students who are initially referred to the program do not have an **active** IEP until all phases outlined in the workflow are completed.

Note: After enrolling a student in special education, renewing, or amending the IEP, all phases of the workflow must be completed to make the IEP **active**. All workflows remain in “draft” form until every phase of the workflow is complete and the IEP has been accepted by the team.

From the IEP tab, select the student from either the My Current Cases list or from the Draft IEPs list depending on your rights by putting a check in the box next to the student’s name, click the Workflows side-tab, and then the **Initial Referral** workflow to follow the steps to complete the student’s initial referral.
10. The next step is to assign team members that will be invited to the meeting. **This step does not allow a team member access to the file.** Click on “Assign Team” to add members.

11. To add a team member, click **Add** on the lower right hand corner

12. Click the **Team member type** drop-down to select the type of team member:
   a. A **Special Education Staff** member (default).
   b. A **Regular Education Staff** member (such as teachers and other school personnel). Select the school you want to select the staff member from. Select the **Current teachers only** checkbox if you want to select a teacher from a list of the student’s current teachers. Note: To select the administrator’s name you must take the check off of the box that says Current Teachers Only.
   c. An **Independent Contact**.
   d. A **Contact** (such as a parent), or
   e. **Student** if appropriate
12. Select the team member and mark the radio button next to the name.

13. Click **OK**.

14. Select the team member’s role if it does not auto-populate.

15. Click the **Chairperson** checkbox for the team member who is the chairperson for this meeting (i.e. who will be chairing the student-specific meeting). This person’s name is what prints on the meeting invitation.

16. Click **OK**.

17. Repeat process until all team members have been added.

**Note:** only one team member can be added at a time

18. Once all team members have been added, click **Save**. This will close the pop-up window.

19. If changes are needed, simply return to the phase via the **Edit** in the workflow and **Save** the changes.
20. Move to the next phase of the Enroll in Special Education workflow: Schedule Referral Review Meeting.

21. A pop up window will appear. Complete the information:
   A. Choose the meeting purpose from the dropdown menu.

   **Note:** Only one reason can be chosen. For referral review meetings, the best choice for purpose is Prereferral.
B. Fill in the meeting date. (Helpful hint: Input as a six digit number 112211 and Aspen will automatically convert to 11/22/2011).

C. Select the time of meeting. (Helpful hint: Input as three to four digit number and Aspen will automatically convert to standard time (i.e. 130 will be converted to 1:30 p.m.)).

D. Type in the location of the meeting. (There is no pick list for meeting locations)

E. Anything typed into the details section will not print on the final invitation. This field is slated to be removed.

F. Put in the first notice date. (Helpful hint: Input as a six digit number 112211 and Aspen will automatically convert to 11/22/2011).

G. Put in the second or third notice date (if applicable). Note: If second or third notice date is used, selecting “final date” will make the first notice date print on the meeting invitation.

H. Only select “Final Date” if multiple dates are entered into this form. If only first notice date is entered, do not select final date.

I. Click Save.

22. Complete the Attendance page to select which invitations will be printed.
23. You may print invitation letters before proceeding to the next phase of the workflow or click on the printer icon at any time to print the invitation. See Printing invitation section in this guide for additional help if needed.
24. Move to the next phase of the workflow: *Convene Referral Review Meeting*. Note the date due that is listed. This date automatically populates according to your school calendar. The date indicates the 10-day deadline to hold the Referral planning meeting once the initial referral has been accepted by the CSC.

25. The first step of *Convening the Referral Meeting* is to verify that the information is correct on the General information Tab. This information was previously put into the system at the *Schedule Referral Review Meeting* step of the workflow process.

26. Move to the Attendance Tab and mark team members who are present at the meeting.
27. Move to the Minutes Tab to record minutes from the meeting. The program is designed to allow minutes to be taken while the meeting is in session. Indicate whether or not parents were informed of their Parental Rights and if they were given a copy of the Parent Rights for Special Education document by choosing the drop downs. In the Summary section, minutes should reflect major discussion topics and recommendations. Please see *Holding the Meeting* section in this guide for additional tips about taking minutes and using spell check. Please remember to save minutes before attempting to move to another section of Aspen or before trying to print.
28. Print the Referral Review Meeting minutes from the workflow screen by clicking the printer icon on the right side of the screen. See *Printing Meeting Minutes* section in this guide for additional help.

29. Complete the *Recommendation* phase of the workflow based on the CSC committee’s decision for next steps: Accept, General Education Alternative, or Reject.

30. If the CSC accepts the referral, enter the date of acceptance and click OK. Then click on *Schedule Assessment Planning Meeting* to complete the next phase of the workflow. Please note the CSC has 10 school days to develop an assessment plan once the referral has been accepted.
31. Complete the General details about the meeting. This is the same process used to schedule the referral review meeting.

NOTE: Initial Assessment Plan is the best reason for this meeting.

32. Move to the Attendance Tab. Consider who will need to attend the meeting. To remove any members from the invitation, unclick the invited box on the attendance tab. If additional team members need to be added to the group, go back to the Assign Team phase at the beginning of the workflow and add people. To access the Assign Team phase again, use the Edit icon in the workflow. Click SAVE when done.
33. Print invitation notices from the workflow screen to inform participants about the Assessment Planning meeting. See Printing Meeting Invitations for additional assistance.

34. Click on the Convene Assessment Planning Meeting/Identify Suspected Disability phase of the workflow. Then click on the Minutes tab.

35. Move to the Attendance Tab and mark team members who are present at the meeting.
36. Move to the Minutes Tab to record notes from the meeting. Click SAVE when done. See Holding Meeting section in this guide for additional help if needed.

NOTE: The user can change to assessment plan without saving via the dropdown menu. However, it is recommended to save and reopen the window before moving to the assessment plan.

37. Print Assessment Planning Meeting notes from the workflow screen.

38. When completed with the minutes section, click on the Edit ✏️ on the Convene Assessment Planning Meeting/Identify Suspected Disability Workflow. The pop-

Note: Aspen does not automatically generate a list of assessments needed per category. The user must enter all needed assessments. Required assessments are listed below each category.

41. **Select the type of evaluation (required).** If known, select the name of the assessments that will be administered, the evaluation date, and the staff member’s name who will administer the assessment.

Note: It is recommended to just select the evaluation type at this point of the assessment plan and allow the assessors to determine specific instruments at a later time. This information can be entered after assessments are completed. If previous evaluations are being accepted for eligibility purposes, they should be entered now.

42. To complete the Evaluation field, use the magnifying glass to select from a list of assessment options. The Evaluation field refers to the general category of assessment, Information Processing or Academic Achievement for example, and not to the specific assessment to be used.
43. To Complete the Tests Administered field (this is recommended after completion of assessment or if accepting a previous evaluation), click on the magnifying glass. Assessment options from an embedded folder. The assessments are divided into folders. The user may opt to click in a folder and find the assessment.

**Helpful Hint:**
When searching in folders, the user can view either from “Category View” or “List View”. The pop-up automatically opens to “Category View” To search easier, switch to “List View”.

Once in “List View,” use CTRL + F and open a search command box.
Simply input the start of a targeted selection (i.e. Wood for Woodcock-Johnson). The search will bring the user to the Wood section of the list. This can be used in any section of Aspen that is in list view.

44. If the assessment cannot be found, leave the Tests/Assessments Administered field blank and type the name of the assessment into the Other Assessment field.

45. Enter the date of completion in the Evaluation Date field if you have it from a previous evaluation.

46. For the staff name; click on the magnifying glass and find the desired staff name then click OK.

47. Verify that the assessments to be administered are correct. Click OK when done.

48. Repeat the process by clicking the Add button until all required assessments are entered for each category. If any additional assessments are needed, add those to the assessment plan in the same manner. Additional assessments should be listed under the suspected category. If multiple disabilities are suspected, list the needed assessments under the corresponding Criterion tab. Click Save when finished with all components of the assessment plan and print using the printer icon.

49. Complete the next phase of the workflow, Send Parent Permission for Evaluation.
50. Add the date that will appear on the Permission for Evaluation letter. Click SAVE when done.

NOTE: Aspen will only allow one reason for assessment to be chosen and printed on the permission form. The determination of one primary disability does not prevent a student from receiving services for other disabilities if the data supports these services. The parent permission form is used to gain parental permission to complete the needed assessment for gathering this data. Each of the suspected disabilities is on the printed assessment plan.
51. Print the letter from the Send Parent Permission for Evaluation phase of the workflow. The assessment plan is printed from the Convene Assessment Planning Meeting phase.

52. Once the permission letter is signed and returned, move to the next phase, Receive Parent Permission, to indicate if the Parent Accepted or Denied permission to assess. Enter the date permission was given and click OK.

53. Move to the next phase of the workflow, Request for Assessment Personnel.

54. Enter the information on the following: Assessment type (New for Initial Referral), Permission received, Permission Date, Contact Name (case manager or assessor managing the assessments), and Contact Phone. **Completion Date:** system calculates this date automatically in the workflow, but does not transfer that information to the Request for Assessment form. Enter the
completion date based on your district’s timeline calendar. 

**In-house completion date:** a local decision to be used as needed but not to exceed the 45 day deadline.

**Withdrawn date:** entered only if parent has withdrawn their permission for assessment.

55. Print the *Request for Assessment Personnel* forms from this phase of the workflow for each assessor.

56. Move to the next phase of the workflow, *Complete Assessments*. The 45-day deadline automatically populates after permission to assess is received and the date is entered.

57. When accessing the Complete Assessments phase, the following pop up window will open. There are five top tabs in this section.
- **Tab I** - Required Assessment Procedures (completed prior to eligibility meeting), Tests/Assessments administered, Synthesis of Data and Information from Parents and others.
- **Tab II** – Criterion Section (completed at meeting)
- **Tab III** – Eligibility Process (completed at meeting)
- **Tab IV** - Present Level of Functioning (completed prior to eligibility meeting)
- **Tab V** – Related Services (may be completed at or before meeting)

Click SAVE when done with all tabs. You do not have to click save after each tab.

Completing Tab I: Sections I-IV

A. **REQUIRED ASSESSMENT PROCEDURES**
   1. Any assessment entered on the assessment plan will appear in this section. To update the completion date, click on the blue name of the assessment. Update the evaluation date and hit OK. Additionally, this information can be added from the assessment plan and will transfer to this section automatically. A completed assessment plan can then be printed for the record. See instructions for entering data in assessment plans and printing assessment plan for more information.

   **TESTS/ASSESSMENTS ADMINISTERED**
   2. Click “add” in the lower right hand corner.
   3. Type in the name of the specific assessment given and the evaluation date, then click OK.
   4. Repeat process until all specific assessments administered to the student are entered on the eligibility report. This needs to include the social/family/medical history, observation and records review.
5. To update or change an entry, simply click on the blue text and update information. Click OK.

B. SYNTHESIS OF TEST DATA
1. Enter the synthesized data collected during the eligibility process. Be sure to include a summary of all assessments used in determining eligibility.
2. To access spell-check: click on the icon in the upper right hand corner of the box. Then click the icon on the bottom right of the screen. Any errors are highlighted in yellow. To correct a misspelling, allow your cursor to hover over the highlighted word and click on the correct word from the drop down. If the correct choice is not listed in the dropdown, simply retype the correct word. Adding to the spelling dictionary is also an option if it is a routine word.
3. Aspen does not have the options to bold, underline, or italicize words in the text boxes. It is also not recommended to cut and paste text from a word document into an Aspen text field that has any bolding, italicizing or underlining.
4. After spell check is complete, hit OK.

Note: Hitting OK does not save the text. It returns to the summary screen. The Save button must be clicked after each tab is complete.

C. INFORMATION FROM PARENTS/GUARDIANS/STUDENTS
1. Enter the data collected from parents, guardians, and students during the eligibility process and any presented at the eligibility meeting.

D. INFORMATION FROM OTHER SOURCES
1. Enter the data collected from the classroom teacher, medical, and records during the eligibility process and any presented at the eligibility meeting.

Completing Tab II: Criterion Section (Completed at Meeting)
A. This section is completed at the eligibility meeting when a decision is reached.

B. For each category suspected, answer all questions for that category by choosing yes or no from the appropriate dropdown menu.

C. Do not answer questions in a category that was not suspected during the eligibility process.

NOTE: All questions under a particular category must be marked “yes” for the student to be eligible for services.
Completing Tab III: Eligibility Process (Completed at Meeting)

Under the “Eligibility Process” tab:

A. Enter the meeting date.

B. To select the case manager, complete one of the following: (1) click the magnifying glass and select the case manager or (2) Start typing the last name of the case manager. Aspen will auto find from a preset list of service providers. Select the case manager’s name once it appears in the selection.

C. Select “Eligible”, “Ineligible” or “Triennial Review” based on CSC decision.

D. Suspected disabilities listed on the assessment plan should be automatically listed on the tab.
   a. If found eligible, click on the chosen area of eligibility. Uncheck the “suspected disability” box and click OK.
   b. If more than one disability was suspected, delete the additional suspected disabilities that were dismissed. Leave one the current category of eligibility. To delete, check the box in front of the unwanted category and click delete.
   c. If found ineligible, delete all suspected categories of disability.
Completing Tab IV: Present Level of Functioning

A. Complete the Present level of Functioning tab by typing in the relevant information pertaining to the student’s educational, social/emotional/adaptive behavior, communication, cognitive, physical/motor and physical health, transition/life skills/career strengths, Areas affected, educational need and Present level of functioning (PLOP).

B. If the area is not addressed during the eligibility process, it is recommended to type in “Area not addressed” or “Not Applicable” into the strengths field for that domain.
C. To add present levels of performance (PLOP) under a domain, click the add button under each domain.
   - Select the targeted area affected from the dropdown list.
   - Select the educational need from the magnifying glass.
   - Type the PLOP in the appropriate field. The field expands to access spell check by clicking on the icon in the upper right hand corner of the box.

2. To activate spell check, click the icon on the bottom right of the screen. Any errors are highlighted in yellow. To correct a misspelling, allow your cursor to hover over the highlighted word and click on the correct word from the drop down. If the correct choice is not listed in the dropdown, simply retype the correct word. Adding to the spelling dictionary is also an option if it is a routine word.
   - When all fields are entered, click OK on the last open field.
   - Repeat this process for each additional area affected.

Completing Tab V: Related Services

A. Complete the Related Services tab by clicking the magnifying glass and selecting the appropriate services the student may require. If the needed related service is not under the magnifying glass, type it in the “Other Related Services" field.
B. If using the “Other Related Services” field, it expands to access spell check by clicking on the icon in the upper right hand corner of the box. To activate spell check, click the icon on the bottom right of the screen. Any errors are highlighted in yellow. To correct a misspelling, allow your cursor to hover over the highlighted word and click on the correct word from the drop down. If the correct choice is not listed in the dropdown, simply retype the correct word. Adding to the spelling dictionary is also an option if it is a routine word.

58. Once all 5 tabs are complete, click **Save**.

59. Move to the next phase of the workflow, Schedule Eligibility Meeting. Complete the General Information about the meeting and invite team members who are to attend. Invite team members to the meeting from the Attendance Tab. Click SAVE when done.
60. Move to the next step of the workflow, *Convene Eligibility Determination Meeting*.

61. A pop-up window will appear. The team may either choose to complete the Meeting Minutes or Eligibility Report first using the drop down at the top of the screen (see below). It will automatically default to the Minutes screen.

62. Complete the Meeting Minutes for the eligibility meeting. Instructions for completing minutes are referenced at various points in this guide. Don’t forget to ensure parents are informed of their rights and responsibilities and are provided a copy.

63. Complete the eligibility report and save. This information is presented and reviewed during the meeting.
64. Print the Eligibility Report and the minutes from the **Convene Eligibility Determination Meeting** section of the workflow. When clicking on the print icon from this phase, both the Meeting Minutes and Eligibility Report should open in separate pop-up windows.

65. In the next section of the workflow, Eligibility Determination, indicate whether the student is **Eligible**, or **Not Eligible** – Process complete. Enter the date of the decision and click ok.

66. If the student is found eligible, the workflow will start new phases which prompt the user to create an initial IEP. Reference the IEP section for more specific information on IEP development.

67. If the student is found ineligible, the workflow is complete.

**Enroll Using Transfer non-DoDEA IEP Workflow**

When a student who has special education records from a non-DoDEA school transfers into your school, you can transfer that student’s special education information into the Special Education view by enrolling the student and selecting the Transfer Non-DoDEA workflow.

**To bring a transfer non-DoDEA student into the Special Education view with an active IEP:**

1. Log on to the Special Education view.
2. Click the **IEP** tab.
3. In the **Options** menu, click **Enroll in Special Education**. Step 1 (See below) of the Special Education Enrollment wizard appears.
4. From the wizard, select **Transfer from Non-DoDEA School**. Type the date or click to select the date the special education records were received.

5. Select the student’s name using the icon, and click **Next**. Step 2 (See Below) of the Special Education Enrollment wizard appears.

6. Select the case manager using the icon. (See Below.)

7. Type the date or click to select the IEP start and end dates. (See Below.)

8. Select the current meeting type. (See Below—Please select Initial as the IEP or meeting type and change with pen and ink on the printed copy for parent signatures. This is necessary in order to have “initial” as the type of IEP on the final DoDEA IEP. HQ is working on a solution.)

9. Type or click to select the meeting date. (See Below.)
10. Click **Next**. Step 3 (See Below) of the Special Education Enrollment wizard appears.

11. Confirm the information and click **Finish** if correct, **Back** if changes are needed.
12. Click the IEP top tab or IEPs breadcrumb and find student in draft status from the My Current Cases filter or from the Draft IEPs filter.

13. Check the box next to the student name and click “Workflows” side tab.
14. Check the box next to the workflow and either click the blue text or Checklist in the Workflows side tab.

15. Once the workflow is displayed; follow the phases throughout the workflow by clicking the blue hyperlinks.

16. At the **Enter Transfer IEP phase**, enter transfer IEP Information, which includes start and end date of transfer IEP; last IEP evaluation date and next IEP evaluation date. Then complete the tabs for Services, Accommodations, LRE and Vocation/Transition (if appropriate). “Click SAVE”. You will be taken back to the workflow.
Note: Goals from the incoming IEP do not have to be entered into Aspen-SPED. The interim DoDEA IEP generated in Aspen should be attached to the incoming IEP goals until such time that the initial DoDEA IEP is developed.

17. At the Confirm Team phase, build the IEP team by clicking “add” to select the IEP team. Complete this step for each member of the team including the parent.

18. Schedule and convene the meeting.

19. In the next step of the workflow, the CSC Team will need to make a decision regarding eligibility for special education services and select one of the following:
Insufficient Information → Active IEP

Insufficient Information → Inactive IEP

Sufficient Information → Active IEP

Sufficient Information → Inactive IEP

20. By selecting “Insufficient Eligibility → Active IEP” the workflow continues through the Eligibility Process to develop an assessment plan and conduct eligibility determination. Create a modified IEP containing the services, accommodations and LRE pages then complete the form: “NOTICE OF INSUFFICIENT INFORMATION FOR ELIGIBILITY DETERMINATION”. Access to this form is described in step 21 below. This Notice instructs parents the student will receive special education services until eligibility or ineligibility according to DoDEA criteria is established, and if the student is found ineligible, special education services will be discontinued.

21. By selecting “Insufficient Eligibility → Inactive IEP” this will end your workflow. The case will go back to SST. Once the CSC has determined there is insufficient information for eligibility they will complete form: “NOTICE OF INSUFFICIENT INFORMATION FOR ELIGIBILITY DETERMINATION”. To locate the Notice of Insufficient Information for eligibility determination:

A. Click on the printer Icon in the Convene Meeting phase of the work flow.
B. Choose CSC Insufficient Eligibility Determination from the drop down list.
C. Click Run.
The form is displayed in PDF form. Click the printer icon to print the form. Complete the form and provide a copy to the parents.

Incoming Records: Sufficient Eligibility Determination

22. By selecting “Sufficient Eligibility – Active” you will be directed to “Generate Draft IEP” where the new IEP can be developed and the eligibility process can be completed. The Eligibility report can be accessed through the dropdown menu in the convene meeting phase. Once this option is selected, the eligibility report section will open and is accessible for completion.
23. When “Sufficient Eligibility-Inactive IEP”, is selected, the next step is to complete the eligibility process. The CSC must review all incoming documentation and proceed as it usually does with any eligible student to develop an IEP.

Defining the CSC Team

Defining the CSC Team:
When you create any workflow for a student, you define those individuals who are instrumental in developing and implementing the student’s specialized educational program.

This step is completed as part of the workflow as team members may change from meeting to meeting.

Note: The user will be prompted to Create Team for every workflow initiated. If it is not the first workflow completed in Aspen-Sped, Aspen will copy the previous team. The user can simply add or delete members.

The IEP team refers to those people who will be in attendance at CSC meetings for the development of IEPs, assessment plans, eligibilities, etc.

To assign CSC team members:
1. Log on to the Special Education view.
2. Click the IEP tab.
3. Select the **student** whose IEP is being developed.

4. Click the **Workflows** side-tab and click on the name of the workflow to open it.

5. Once in the workflow, click on the **Assign Team** or **Confirm Team** phase.

6. The following pop-up window will appear if Assign Team is chosen.

7. If the student has a previous team defined, those team members will be listed.

NOTE: Listing specific names is optional when creating the CSC team. **Positions must be listed.** Check with your District SPED ISS for a decision to list names or just positions. Names can be added later if desired. All CSC meetings must include, at a
minimum, Administrator/Designee, Special Education Teacher, General Education Teacher, Parent, and Student (as appropriate)

8. To delete a team member, click the check box in front of the team member, next click Delete. The team member will be removed from the current team.

9. To add a team member, click Add on the lower right hand corner. Type in the team member’s last name and when it appears, click to add the new team member.

10. If opting to include individual names, complete the following: At the Last name field, click . The IEP Team Member Pick List appears and only one name can be chosen at a time:

11. Click the Team member type drop-down to select the type of team member:
   a. A Special Education Staff member.
   b. A Regular Education Staff member (such as teachers and other personnel). Select the school you want to select the staff member from. Select the Current teachers only checkbox if you want to select a teacher from a list of the student’s current teachers.
   c. An Independent Contact (outside agency personnel).
   d. A Contact (such as a parent or guardian)
   e. A Student.

NOTE: If the name of a selected team member is not appearing in Aspen-Sped, contact your District SPED ISS or SIS.

12. Select the team member.
13. Click OK.

14. Select the team member’s role if it does not autopopulate.

Note: If opting to only include positions, the previous steps identifying names are unnecessary.

15. Select the Chairperson check box if this team member is the chairperson for this meeting (i.e. who will be chairing the student-specific meeting. This may not be the case manager).

16. Click OK.

17. Repeat process until all team members have been added.

18. Once all team members have been added, click Save. This will close the pop-up window.

19. If changes are needed, simply return to the phase via the Edit button in the workflow and add/delete members.

IEP Development

Writing an IEP

Writing the IEP consists of:

- Entering and managing the IEP
- Defining goals
- Identifying services
- Tracking IEP accommodations

Enter and Manage Student IEPs

In the Special Education view, enter IEPs for your special education students. The system automatically creates a draft IEP when you enroll or renew a student’s file in the special education program.

To create an IEP for a student outside of the initial referral workflow:

1. Log on to the Special Education view.

2. Click the IEP tab.
3. Click Options and either Renew or Amend IEP. If the workflow has already been created, find the “Draft” IEP via the My Current Cases or Draft filter.

IEPs have several pages. Pages appear as sub-tabs at the top of each page of the IEP. Click a sub-tab, such as Goals, to change to a different page:

```
<table>
<thead>
<tr>
<th>ID</th>
<th>Focus</th>
<th>Present Level of Performance</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LANA</td>
<td>Natalie is attending regular curriculum class with...</td>
<td>THE STUDENT WILL IDENTIFY AND USE THE BASIC PARTS...</td>
</tr>
<tr>
<td>1</td>
<td>LAND</td>
<td>Natalie demonstrates continuous improvement at 4th grade level...</td>
<td>THE STUDENT WILL IMPROVE SYNTAX AND MORPHOLOGY...</td>
</tr>
<tr>
<td>1</td>
<td>LS</td>
<td>Natalie is a very responsible student. She initiated...</td>
<td>THE STUDENT WILL TAKE NOTES...</td>
</tr>
<tr>
<td>1</td>
<td>MATH</td>
<td>Natalie has shown some improvement in her mathematics...</td>
<td>THE STUDENT WILL UNDERSTAND AND USE STATISTICS, T...</td>
</tr>
<tr>
<td>1</td>
<td>MCTR</td>
<td>05/11/2009: Natalie has been receiving OT to improve...</td>
<td>THE STUDENT WILL DEMONSTRATE VISUAL PROCESSING SKIL...</td>
</tr>
<tr>
<td>1</td>
<td>READ</td>
<td>Natalie is reading at a 4th grade level. She's based...</td>
<td>THE STUDENT WILL DEMONSTRATE KNOWLEDGE OF SPECIALL...</td>
</tr>
</tbody>
</table>
```

**Note:** You do not have to save after entering data into every sub-tab. Just remember to click **Save** after you enter or edit information on the final sub-tab.

**SECTION: IEP Goals**

Goals are identified based upon the area of specific educational need. Goals may be selected from the DoDEA Goals and Objectives bank, or created by individual users.

**Note:** Most users define this information while entering an IEP for a student. Anything you view or enter using these instructions also appears in the actual IEP.

**To write an IEP goal:**

1. Log on to the Special Education view.
2. Click the IEP tab.
3. Select the IEP you need to define goals for- the draft IEP (click on the student’s name or check the box next to the name and click on the Details side-tab).
4. Click the Goals sub-tab. Any goals already defined for the IEP appear.
5. Click Add. The IEP Goal dialog box appears.
Note: Click **Goal Bank Selection** to select a DoDEA goal from the data bank or an individual goal previously written by you and saved to the goal bank.

6. Type the goal number (identifier-this number must be unique) and select specific goal focus.

7. Click Goal Bank Selection. Select category, subcategory, goal, and click “next” this will direct you to the objective bank to select objectives. You may also type in your own goals.

**Note:** The Identifier, Specific Goal Focus and Measurable Annual Goal fields must be completed first. If these fields are not filled in when Aspen attempts to auto save, you will receive an error message and any data you are typing will be lost.

8. Below the appropriate heading, type performance level information and the measurable annual goals.

You can choose goals/objectives from the bank or type in your own.
9. Select objective(s) and Click Finish.
10. Click the number next to each objective which will expand the fields and that will allow you to complete Modifier and Mastery by clicking the magnifying glass.

**Note:** User must type modifier and/or Mastery Criteria (if not selected from the bank) into the objective field as there is no mechanism in place for a user to enter text manually into the modifier or mastery fields.

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Specific Goal Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Need**

**Present Level of Performance**

**Measurable Annual Goal**

THE STUDENT WILL IMPROVE LARYNGEAL FUNCTION.

**Benchmark Objectives**

<table>
<thead>
<tr>
<th>SeqNo</th>
<th>Objective</th>
<th>Modifier</th>
<th>Mastery</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>an object</td>
<td>at a distance of 1 foot</td>
<td>at routine time(s)</td>
</tr>
</tbody>
</table>

11. The magnifying glass will allow you to select (modifier; mastery) and then click OK to return to above screen and click save.
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistive Devices Technology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MOD-Indemement of Change</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MOD-Longth of Response</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MOD-Level of Proficiency/</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MOD-Mode of Response</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MOD-Motor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MOD-Quidness of Response</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MOD-Settings</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Add a Goal to Your User Goal Bank

The user goal bank contains goals that are only available to the user who writes them and are owned by the user. They save you time when you are frequently writing the same or similar goals for students while you work on your IEPs. You can save the goals you use often, along with any attached objectives, to quickly select and edit for your students. In the goals top tab (under Details) choose “Add to Goal Bank.”

This will open the Goal Bank Wizard. Follow steps 1-4.

1. Choose New or Update (New to create, Update to edit existing)
2. Choose the category and subcategory and the owner (YOU!). You may also enter the names of the students needing this goal.

3. Type in your goal and click next.

4. Add your objectives and click finish.
Adding IEP Services, Accommodations, Vocation/Transition, LRE statement needed by the Special Education Student

When you define a student’s *IEP Individualized Education Program*, identify the services the student might need to achieve his or her goals. For example, a student might need special transportation to attend school, a direct service such as speech therapy, or a related service such as mental health services.

**Note:** If a user deletes a goal from a student’s IEP, the system automatically deletes the goal from any services it was aligned with.

When you identify services, you might also define the following:

- when the service begins
- how often the student receives the service
- how long each session lasts
- the service provider’s ratio to students
- the service provider’s qualifications

**Note:** Most users define this information while entering an IEP for a student. Anything you view or enter using these instructions also appears in the actual IEP.

As long as the workflow has not been completed, the IEP is in “**draft**” status and you may return to the workflow, click the pencil (edit) under “generate draft IEP.”
Select the tab to be edited. The tab selected will be determined by what is to be edited, for instance if you want to edit:

- Physical Education select “services tab”
- Transportation select “services tab”
- Standardized Testing select “accommodations tab”

2. Within the “goals” and “services” tabs, click “add” to proceed and then “save”.
3. Within the “Accommodations”, “vocational/transition”, and “LRE” tabs, make changes and click “save”.

Justification for Placement: Explanation of the extent, if any, to which the student will not participate with non-disabled peers. Describe how the student’s disability affects his/her involvement and progress in the general curriculum. For preschool children, indicate how the child’s disability affects his/her participation in appropriate activities.

Student Progress: Parents will be informed of their child’s progress in meeting the goals of their IEP on the same timeline as non-disabled students. DoDEA requires the reporting of student progress on a quarterly basis.

Method by which the student’s progress will be reported. The student’s progress toward mastery of IEP goals will be presented by electronic or a hand-generated report.

If progress will be reported more frequently, indicate schedule for reporting the student’s progress.
Amending (Modifying) the IEP

Amending an IEP

There will be times when an IEP needs to be updated. Most special education users may need to:

1. Amend (Modify) an active IEP to change a service being provided to the student.

1. Renew an IEP by reviewing the student's progress and implement a new IEP. This includes:
   - Annual IEP Review
   - Transfer from DoDEA School
   - Triennial IEP Review

Amend (Modifying) an Active IEP

1. Go to the IEP Tab.
2. Click on the filter at the right and select choice.

Note: When generating the Amend IEP workflow, the student selected must meet the following criteria:
3. Student has an active IEP (even if it's not their latest).

4. Student does not have a draft amendment IEP.

5. On the Options menu, click Amend IEP.

6. A dialog box appears.

7. Select the IEP Amendment workflow, (Modification) and type or click the date of the amendment.

8. Click OK. The system copies the active IEP into a draft IEP:
9. Click the **Workflows** side-tab to complete the IEP Amendment workflow. Follow all steps, and change any necessary information per each screen through the workflow.

10. Click “Modifications”
11. The workflow will appear.

12. Click “Confirm Team” select your team by checking each team member and then click “save”. Select all possible team members including the parent, the student, when appropriate, counselor, etc. Those selected may not be required to attend.

13. Click “Update IEP with Modification”
14. Make changes to each appropriate tab remembering to click “save” once each tab is completed.

15. The “Goals” tab and the “Services” tab requires you to click “add” to begin the process of making changes.
16. Once changes are saved the next step of the workflow directs you to “Schedule Modification Meeting.”

17. Schedule the meeting by completing the first tab “General” and the second tab “Attendance” and clicking “save” after inputting data under each tab.

18. You will then be directed to “Convene Modification Meeting” where under the third tab you will complete meeting minutes and click “save.”
19. The final step of the workflow is “Recommendation”. At this point in the CSC process, the team must decide to accept the draft IEP without additional assessments. Or, the team has the option of requesting additional assessments.

20. If “Additional Assessment Needed” is selected, this will direct the workflow to complete an additional assessment plan and allow the user to complete the process for obtaining additional information for changes to services or eligibility.
Renew an IEP:
- Transfer from DoDEA School
- Annual IEP Review
- Triennial IEP Review

The Renew IEP process is to identify the continuation of special education services. This process may be conducted for the annual IEP review, the triennial IEP review, or for students transferring from one DoDEA school to another.

To renew a student’s special education enrollment:
1. Click the IEP tab.

2. On the Options menu, click Renew IEP. Step 1 of 3 of the IEP Renewal wizard appears.

3. At the Workflow field, select one of the following 3 options:
   - Transfer from DoDEA School
   - Annual Review
   - Triennial Review

Transfer from DoDEA School
1. From the options menu choose Renew IEP
2. Select Student  (IEP and Student Status must be set to Active)
3. Assign a Case manager
4. Click Finish
An IEP developed in one DoDEA school is valid at all DoDEA schools. The receiving school is obligated to accept the incoming IEP, to address the needs reflected in the goals and objectives, and to provide services consistent with the IEP. In this circumstance the CSC would choose Sufficient Information-Active IEP and move on through the phases of the workflow. The specifics of the IEP would not be changed but the Case manager has the ability to change the names of the service providers in the services tab and then complete the workflow.

If the DoDEA IEP is accepted and implemented as written, a CSC meeting with parents is not necessary. However, the CSC must provide written notification to the parent that the student will be served according to the incoming IEP. CSC Minutes of Meeting from the Internal School Meeting is completed and a copy sent home to the parents. The minutes of the meeting serve as written notification to the parents that their child is being served according to the incoming IEP. If requested by the parent(s), a meeting to review the incoming DoDEA records will be convened.
A meeting with the parents must be convened within 15 school days of the student’s enrollment if the school is unable to serve the student exactly as required by the incoming IEP. In this case, the CSC would choose Insufficient Information—Active IEP or Inactive IEP if the IEP has expired in transition and modify the IEP as necessary before completing the workflow.

If the DoDEA IEP cannot be implemented as written or the CSC disagrees with the incoming IEP, a CSC meeting with parents must be convened no later than 15 school days following receipt of the active IEP. CSC Minutes of Meeting is completed at this meeting. Assessment planning and parent permission for evaluation may also be completed during this meeting.

The choice made in the Review transfer IEP phase will determine the remaining phases of this workflow.

**Annual Review**
1. At the **Date** field, type the date, or click ☐ to select the IEP renewal date.
2. At the **Student** field, click ☐ and select the student to renew, and click **OK**.
3. Click **Next**. Step 2 of the IEP Renewal wizard appears.
4. To select the case manager, or person responsible for the renewal of the student, begin typing the name and select the one you want, or click ☐ to make a selection from a pick list.
5. The system copies the current IEP into a new draft IEP, which you can edit.

   ![IEP Renewal: Details](image)

   **Important:** A student can only have one *active* IEP and one *draft* IEP.

6. Click **Next**. Step 3 of the IEP Renewal wizard appears.

7. Confirm the information, and do one of the following:
   - Click **Back** to fix any errors.
   - Click **Finish** to renew the student.

8. Click the **Workflows** side-tab to complete the renewal workflow you generated.

   **Note:** If a student is found no longer eligible on a Re-evaluation workflow, the system changes the status of the *active* IEP to *Previous*, and changes the status of the draft IEP to *Discarded*.
**Triennial Review**

Access the triennial review process by clicking on the IEP tab and then Options. Choose renew IEP to begin the triennial review process.

After entering information in each step, click Finish. You will then need to filter the IEPs to view draft IEPs to access the Triennial review workflow. Follow the steps of the workflow.

Follow the steps of the workflow to develop assessment plan and create eligibility report and new IEP.

**Accommodations Directory Report**
Track any standardized testing special accommodations a student might need. For example, a student might require small group or have the test read to them.

To track special standardized testing accommodations with the Accommodations Directory Report.

1. Log on to the Special Education view.
2. Click the IEP tab.
3. Select the IEP(s) you need to track accommodations for by putting a check in the box next to the students names.

Run the Accommodation Directory Report

Click on the Reports tab and then Accommodation Directory. Enter a case manager's name or leave blank for all case managers at a particular school and click run.
Prepared Progress Reports

Preparing IEP Progress Reports

Quarterly progress reports are opened and pushed out to the users by the District SPED ISS prior to their completion. This process opens the progress reports for all students within a district during the progress reporting period and allows users the ability to complete these reports. Please note the steps below for completing this process.

1. Filter List of Students to only show your specific School or District.

2. Choose all students in your filtered list by placing a checkmark next to each name.

3. Click on Options and then Show Selected to choose just these students.

2. Click on the filter and Active IEPs.

3. Click on Options and Prepare Progress Reports.
4. In the pop-up window enter the progress reporting period and the date progress reports are due to go out. The system defaults to Current Selection. Please make sure this is your choice before clicking Run.

Special education managers, service providers, and case managers can add progress reports to an IEP at any time (such as annual review or at parent requests), and can continually edit the reports.

**When in the IEP tab; choose the student to work on and click on the Forms side tab and select IGP-PREPARE (new) and this screen will appear:**
Complete the information on the goals to be reported on (add them one at a time) and click OK.

This screen will appear:

When finished entering the progress report data click on Reports and then IEP Progress Report (Form) and the PDF document will load.
**Administrative Data Sheet / Special Education Student Summary Sheet**

Each student with an identified confidential student file should have a special education student Administrative Data Sheet. In addition to identifying basic student demographic information, this sheet serves as a summary of the special education services currently provided.

Until this form is updated, pilot school users are requested to complete this Administrative Data Sheet which may be accessed by:

1. Click on the IEP tab.
2. Use the filter to identify current active students.
3. Locate the student in question and check the box next to their name. Click on the Forms tab on the left.
4. Scroll down to the Administrative Data Sheet and click new. If the data sheet has already been completed you can edit or print it from the date or printer icon.
5. Complete the form on the screen with any missing information.
6. Save the document
7. Click the printer icon.
8. Place a copy of the document in the student’s confidential student file.
**Special Education Register Report**

The Special Education Register Report provides Student and Contact information as well as the students’ status and pertinent dates. In order to run this report:

1. Go to the special education view and the student tab and filter for Active IEPs.
2. Click on Reports and Special Education Register (if you have access to multiple schools you will need to filter by the school name).
3. Click Run and the report will be generated.

**IEP Meeting Schedule Report**

The IEP Meeting Schedule Report functions in much the same way the Projected Review Dates reports functions in Excent.

1. Go to the special Education view and the student tab and filter for Active IEPs.
2. Click on Reports and IEP Meeting Schedule Report.
3. Enter the information in the following fields (you can also filter by individual case managers) and click run.

![IEP Meeting Schedule]

**Service Delivery Report**
The Service Delivery Report provides the caseloads for individual service providers and case managers (Caseload Report) or for an entire school and can be filtered to include consultative services as well as placement programs. To run this report:

1. Go to Special Education view, IEP tab and filter for active students.

2. Click on Reports and then Service Delivery.

3. Fill in the necessary information and click run.