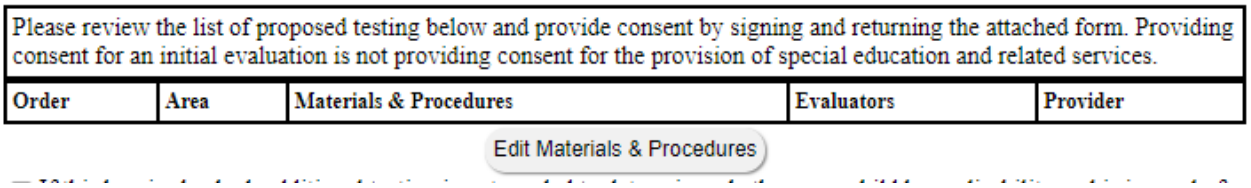
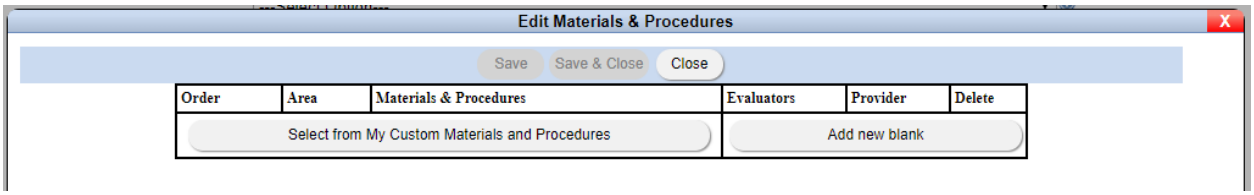
Before tracking Assessments

Before assessments can be tracked, they must be both added to the Eval/Reeval PWN form and finalized. Once they are added and finalized, they can be added to a user's tracking. This is a refresher on how to use the Materials and Procedures section of the Eval/Reeval PWN pages.

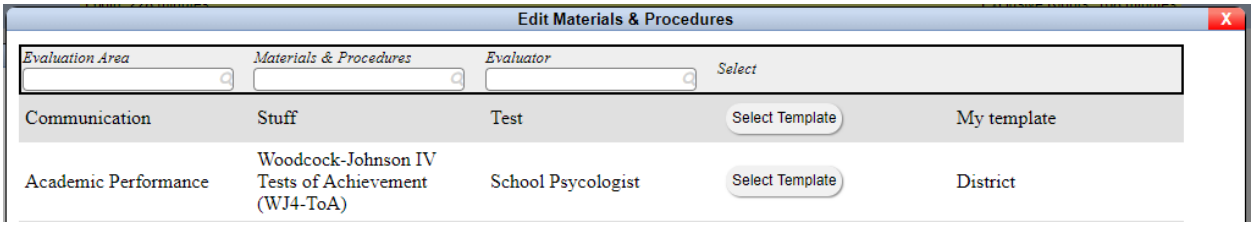
1. The process is the same, regardless of the form. The following is an example starting from the Notice of Proposed Eval: Part B, but the process for using the Materials and Procedures portion does not change from form to form.
2. Below the narrative section of the page, there is the Materials Grid



3. Clicking Edit Materials & Procedures brings up the editing popup.



4. You can add a new blank row to the grid, which is not pre-filled, or select from any you have created before from your Educator Setup menu or any your district has set up.



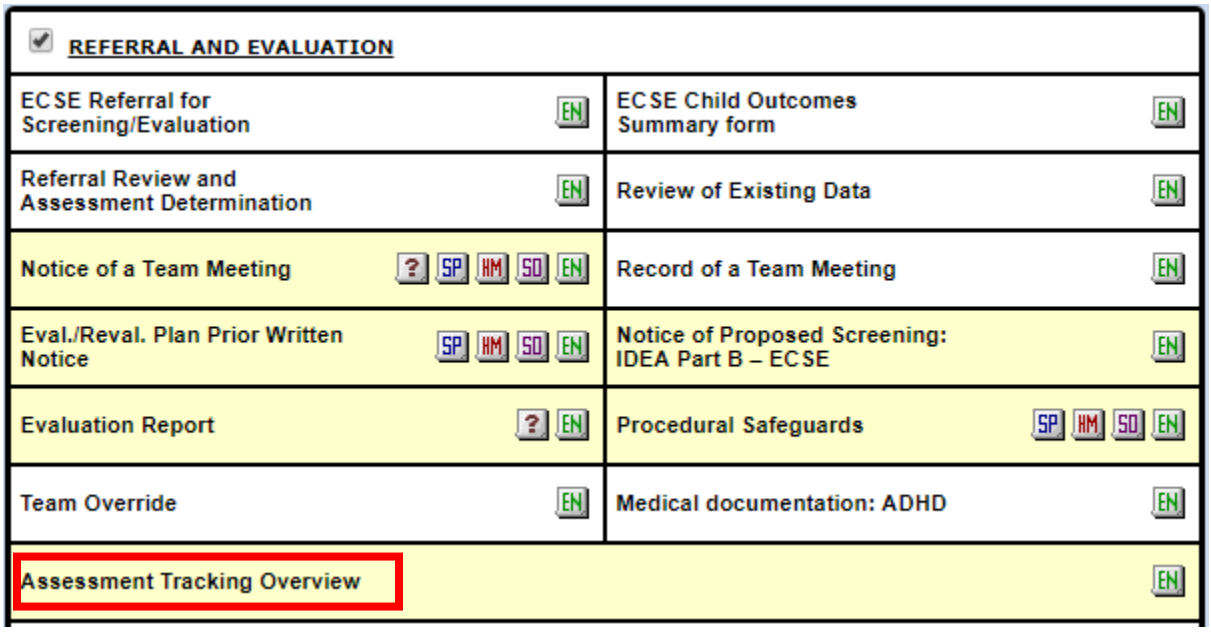
5. You can search for any of the three fields using the text boxes at the top. Your templates are marked as "My Template" and ones set up by the district are marked as "District".
6. Clicking "Select Template" next to the template option will add it with all selected options pre-filled aside from "Provider"
7. Checking "Delete" will not immediately delete the item, but after clicking "Save" or "Save & Close", the item will be gone and cannot be recovered.

Order	Area	Materials & Procedures	Evaluators	Provider	Delete
1	Academic Performan Academic Performance	---Select Area--- Woodcock-Johnson IV Tests of Achievement (WJ4-ToA)	Insert from this list School Psycologist	Select User	

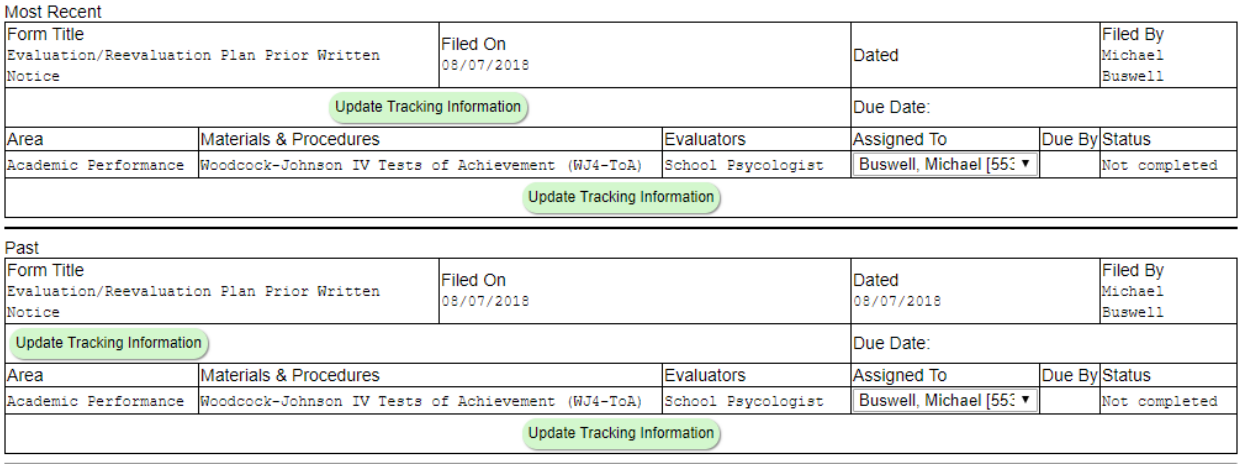
8. If you do not click “Save” or “Save & Close” any new items will not be added, and any changes to existing items will not be saved.
9. Once Materials & Procedures are added, you’re ready to move onto the next steps.

Guide for using the Assessment Tracker

Using the Assessment Tracking Overview (Student page)

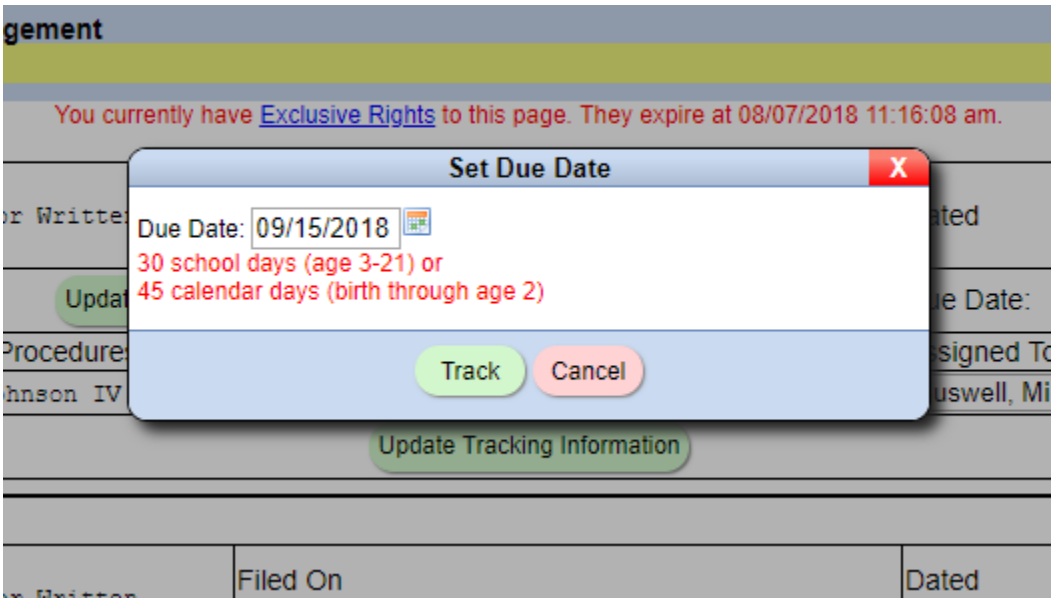


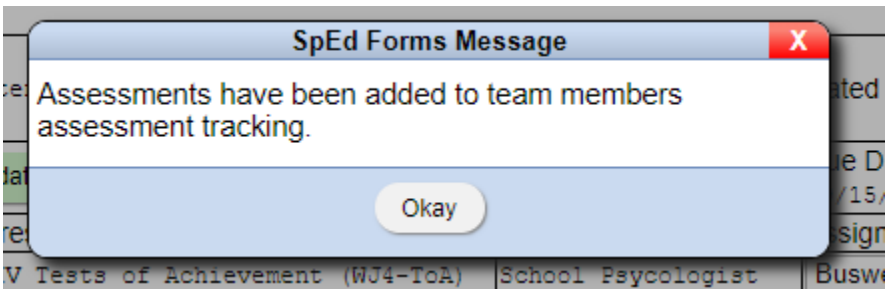
A case manager or administrator can view, assign, and set the due date for a student's Evaluations/Materials/Procedures from this page. It's accessible in the Referral and Evaluation section of the main SpEd Forms.



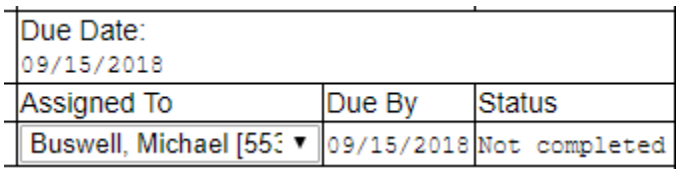
1. The most recently finalized Eval/Reeval PWN will be displayed at the top along with some basic data for each form finalized to help identify which one is required for tracking.

2. Tracking Evaluation/Materials/Procedures from an Eval/Reeval PWN
    a. An Eval/Reeval must have been finalized after 5/4/2018
    b. After finalizing an evaluation, a case manager or administrator should go to the "Evaluation/Reevaluation Procedures" page, the last item in the Referral and Evaluation section.
    c. The most recent (by date on the form) will be at the top
        i. If users were chosen prior to finalizing, those names will be auto filled and all that's needed is to set a due date by clicking the Update Tracking Information button and choosing a date.
        ii. Click "Track" to create tasks.





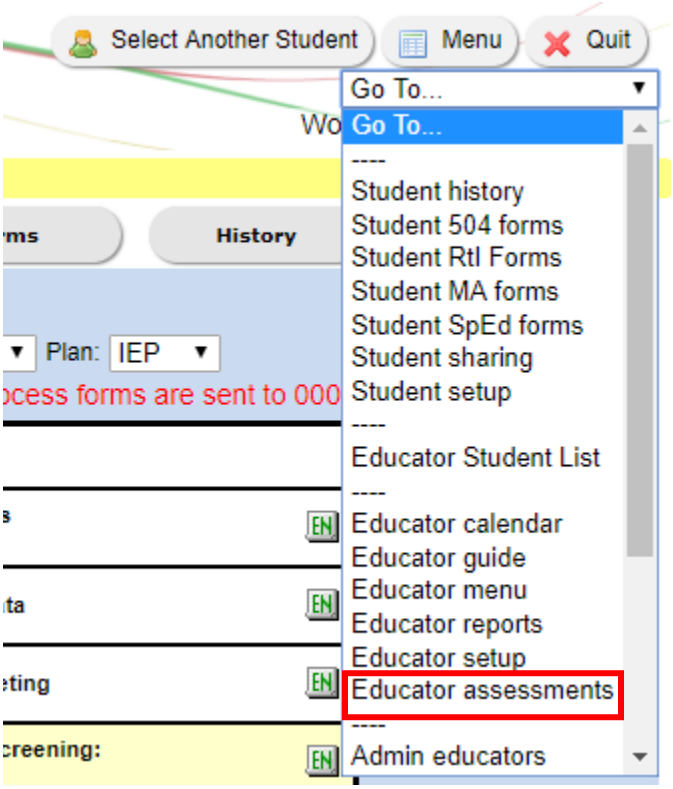
        iii. If users were not chosen prior to finalizing, providers will need to be chosen from the drop down next to each item. If no users are selected, the assessments will not be tracked.
        iv. The same due date is set for each item in the list.

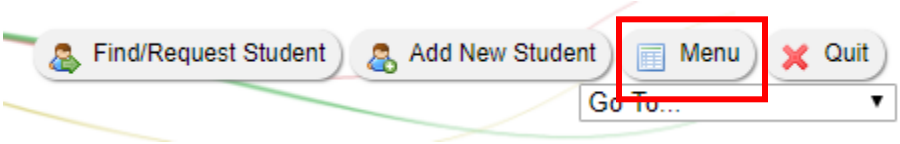


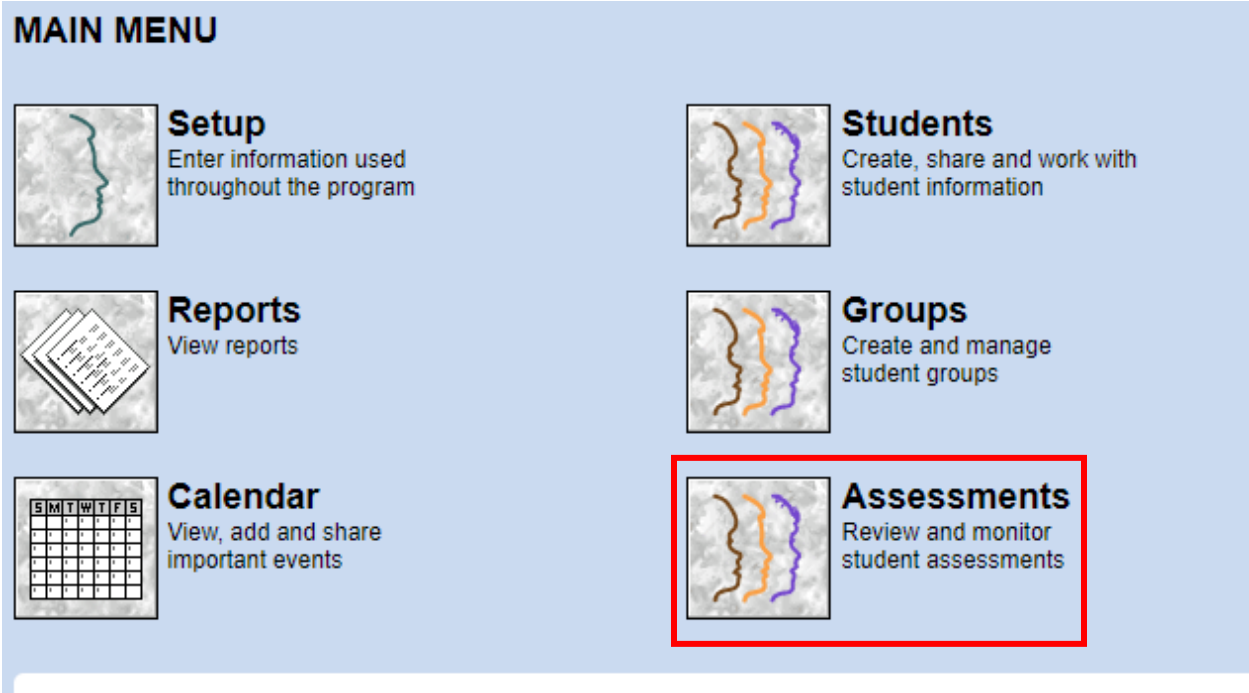
3. Changing the date or assigned user
    a. If the date was entered incorrectly or a user chosen incorrectly, correcting it is as easy as changing the users and clicking the “Update Tracking Information” and either choosing the correct date or leaving the date alone and clicking Track.
4. When the person who was assigned to the task marks an item completed, it will show up on this page as “Completed on (date completed)” otherwise it will show “Not completed”.
5. Items that do not have a user assigned to them will not be tracked until they are assigned to a user in the system. That user can be the case manager in a case where a provider without a SpEd Forms login is completing the test.

Using the Assessment Tracker (User Main Menu)

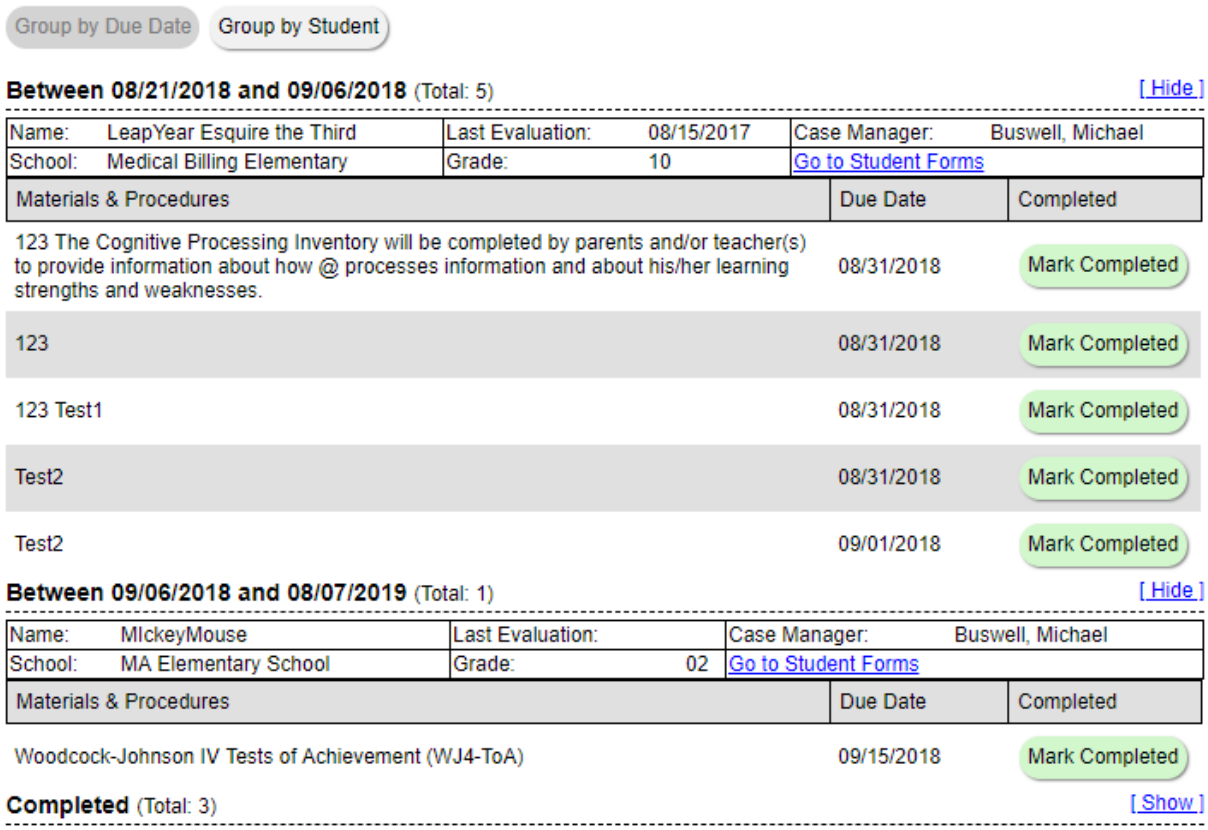
A user can view and track their assigned Assessments/Materials/Procedures by going to the main menu -- Menu button or “Educator Menu” from the Go to… drop down.







This will take you to the main assessments tracking page:



Group by Due Date | Group by Student

Between 08/21/2018 and 09/06/2018 (Total: 5) [Hide]

Name:	LeapYear Esquire the Third	Last Evaluation:	08/15/2017	Case Manager:	Buswell, Michael
School:	Medical Billing Elementary	Grade:	10	Go to Student Forms	

Materials & Procedures	Due Date	Completed
123 The Cognitive Processing Inventory will be completed by parents and/or teacher(s) to provide information about how @ processes information and about his/her learning strengths and weaknesses.	08/31/2018	Mark Completed
123	08/31/2018	Mark Completed
123 Test1	08/31/2018	Mark Completed
Test2	08/31/2018	Mark Completed
Test2	09/01/2018	Mark Completed

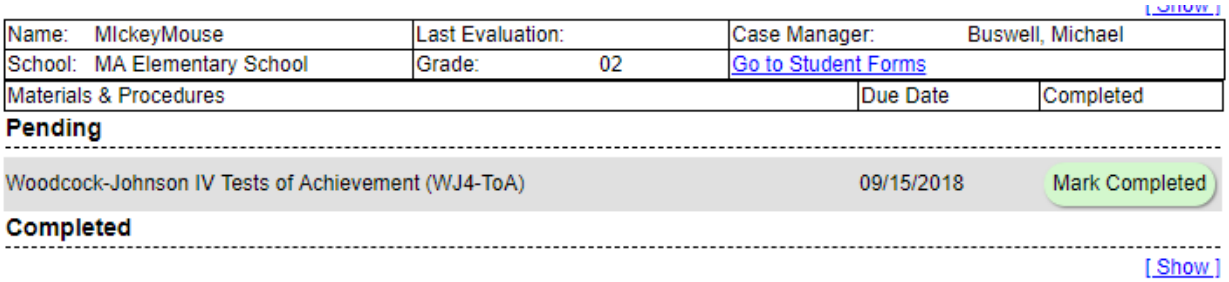
Between 09/06/2018 and 08/07/2019 (Total: 1) [Hide]

Name:	MIckeyMouse	Last Evaluation:		Case Manager:	Buswell, Michael
School:	MA Elementary School	Grade:	02	Go to Student Forms	

Materials & Procedures	Due Date	Completed
Woodcock-Johnson IV Tests of Achievement (WJ4-ToA)	09/15/2018	Mark Completed

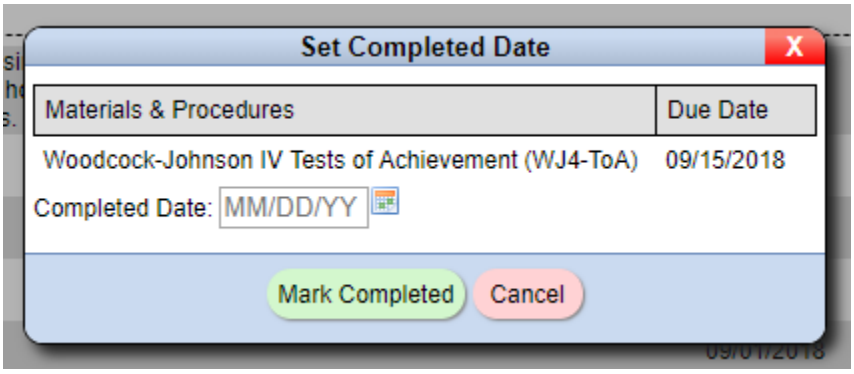
Completed (Total: 3) [Show]

1. The page lists all assigned Assessments/Materials/Procedures for the user viewing the record.
    a. There are two groups – Group by Due Date and Group by Student
        i. Group by Due Date
            1. Grouped by: Past Due, 1 week, 2 weeks, 1 month, 1 year, >1 year, Completed
                a. Students are grouped together in each period with date ordered assessments.
                b. Completed is hidden by default, and only the past 90 days of completed tasks are shown to prevent cluttering.
        ii. Group by Student
            1. Students are grouped together with Materials/Procedures/Assessments listed in ascending chronological order, with Completed listed at the bottom and hidden by default. Clicking "Show" will expand the list in either mode.
            2. Tasks are divided into Pending (sorted by date), and Completed.

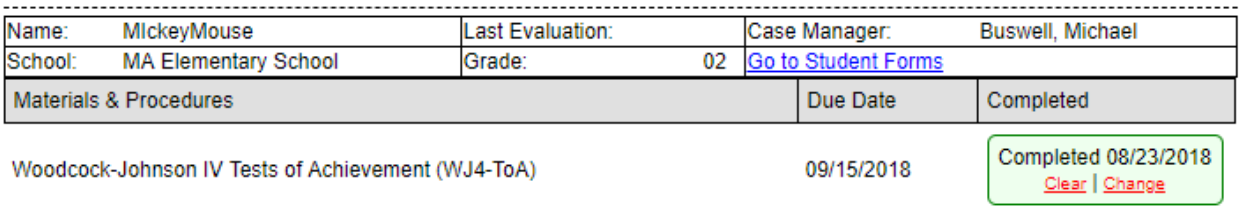


        iii. The default is Group by Due Date

2. Users are unable to change the due dates from this page, and only case managers or administrators can do that from the student page (see above guide)
3. Marking an Assessment completed
    a. Clicking “Mark Completed” pops up a window asking for the date completed. Clicking Mark Completed requires a date to be entered and cannot be marked completed without one.



    b. This will change the button to a box indicating when it was completed with the option to “Clear” or “Change”



        i. Clear removes the date and marks the item not completed.
        ii. Change allows the user to select a different date for completion if the date was entered incorrectly.