Version History

Version	Date	Description
1.0	Oct 2018	Initial published version
1.1	Nov 2018	Clarified the Supplementary Plan district reference table for additional selection items and goal entry order
1.2	Jan 2019	Updated for 5.9 Release: New Filters.
1.3	Mar 2019	1. New field 'Type of Goal' added to competency-based IEP template under objectives of curricular competency goals tab (Section 4.1.5). 2. Type of Goal will be populated on the CB IEP report if selected (Section 9).
1.4	Apr 2019	Updated PSR IEP Inclusions section. Added hyperlinks to Table of Contents.
1.5	Jul 2019	Clarification in multiple areas that the Case Manager picklist requires the Staff Details to be populated
1.6	Jul 2019	Added new Release 5.10 features to sections 2.1 and 8
	Oct 2019	Updated screenshot for new default field set
1.8	Nov 2019	Updated for 10.0 Printing the Competency Based IEP
1.9	Apr 2020	Updated the screenshot of student demographic screen to show DOB with format hint
1.10	Aug 2020	Updated screenshot for the support type in the CB IEP report
1.11	Oct 2020	Updated document from Competency based Inclusive Education Plans to Competency Based Individual Education Plans
1.12	Feb 2021	Updated the document with new screenshot for report, updated screen shots for Completing plan section
1.13	Jul 2021	6.3 New Filter-Next year student on Student TT Section 2.5 Staff Inclusive Education Role
1.14	Aug 2022	Progress Report and Process/Change Management updates for clarification Parent Portal visibility, update on where you can run the Competency Based IEP report and update PSR Inclusion templates
1.15	June 2023	Updated information for the new competencies and new report screenshots
1.16	Mar 2024	Updated screenshots for Plan details and information for Goal Progress Report My Learning Profile – added new functionality, separate tabs
1.17	Dec 2024	Update SPED language to Inclusive Education (IncEd)
1.18	Dec 2024	Updated screenshot for Progress Report - Competency Based IEP (Section 11)
1.19	Jan 2025	Updated section 4.1.8 – Updated the screenshots – completing plan

1.20	Mar 2025	Updated section 4.1.3 –Additional comments field size clarification
1.21	Dec 2025	Updated sections 4.1.4, 4.1.5, 4.1.6 and 11 - Addition to CB-IEP Goals and Objectives tab. Updated Section 10 – Changed 'IEP Date' to 'Plan Date' on CB-IEP Report and Progress Report

Confidentiality

Table of Contents

1.0   Introduction

In MyEducation BC, the Student Services module provides a simple interface that allows users to write support plans and review student progress. The module is flexible enough to align with district practice while capturing all the required data elements for the Student Plan.

There are two formats available for the purpose of documenting the services provided to students to support their education. The Individual Education Plan format and the Competency Based format. Districts, in partnership with their Student Services departments, can choose which format will be in use within their district. The form used will be a district wide commitment.

Submit a Service Request to have the default template set to the Competency based IEP, if that is the desired format for the district.

Important note: If there is an existing plan for a student a user can continue to work on it in its current format. Data from one plan format (Individual Education) does not copy into the different format (Competency Based) and vice versa. A new plan is created in the format that has been defined as the default for the district.

2.0   Navigating in the Student Services View

Users with the role of *Student Services – School* have access to Student Services – School view to manage support plans for students at a defined school. Users with the *Student Services - District* role have access to the Student Services - Organization view and Student Services – School view to manage student services for all schools in the district.

2.1 Filters

See the Fundamentals Guide for more information about the use of filters and the Advanced Filter functionality.

2.1.1   Standard Filter in the Student Services View

2.1.2   Advanced Filter in the Student Services View
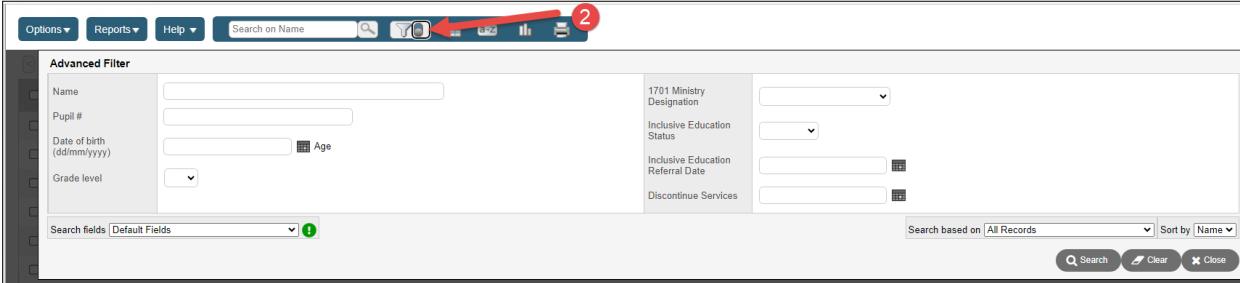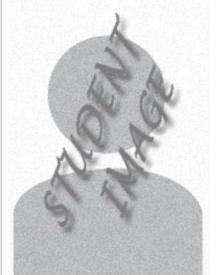
Filter	Results
All Records	Displays all records
My Cases – Active and Draft	Presents a list of students with an Active or Draft plan
My Cases	Presents a list of all students in your case load with an Active, Draft, Previous or Discarded plan
Active	Presents a list of students with an Individual Education status of Active
Active-Inactive Enrollment	Presents a list of students who have an Enrollment status of withdrawn or graduated and an Active plan/status in Student Services.
Not Eligible	Not relevant for BC. Filter based on workflow model to set Individual Ed status to Ineligible
Referred	Not relevant for BC. Filter based on workflow model to set Individual Ed status to Referred
Exited	Presents a list of students with Individual Ed status of Exited.
Active with Designation	(To be Removed)Doesn't work – shows Active and Exited students with designations
Designated students with Draft IEPs	Displays students with a designation and a draft plan
Designation = ?	Query for students with a specific designation
Next Year Students	Presents a list where the student's next year school value is equal to the school and the Inclusive Education Status is not empty.

2.2 Student Top Tab

The Student TT provides access to the list of students enrolled in student services. Choose the students that you want to work with using the filters provided.

2.2.1 Details side tab

The Details ST displays the basic student demographic details.

Pupil #	975276	
Personal Education Number	128697851	
Usual last name	Aalders	
Usual first name	Poksui	
Gender	F	Photo
Date of birth (dd/mm/yyyy)	17/03/2003 Age 17	
Home phone	604-811-0905	
Cell phone		
Student email	ciow3664o3ns@97d9o.gl	Memo
Homeroom	C102	Alerts
Grade level	10	
Primary Designation	P	
Inclusive Education Status	Active	
Inclusive Education Referral Date		
Discontinue Services		

💾 Save   ✖ Cancel

2.2.2 Plans side tab

The Plans ST displays a list of the student's plans. Filter the plans to display, using the dictionary icon 📖

| Pages | Student | Plan | Log | Global | Staff | Admin |

Student List :: 10 - Aarestad, Xingeng

Details	Options ▼ Reports ▼ Help ▼ Search on StartDate							
Plans Details Designations Workflows Forms	0 of 1 selected						All Records - Competency Based Plan	
	Name	**PlanName**	**Status**	**CaseManager > Name**	**StartDate**	**EndDate**	**Plan review date**	**ExitDate**
Contacts	☐ Aarestad, Xingeng	43-IEP-2019/2020	Active	Fabon, Riou	12/1/2019			
Attendance								
Conduct								
Academics								
Transcript								

2.2.3 Contacts side tab

The Contacts ST displays a list of the student's contacts.

Contacts with *Include on Plan* checked and *Parent or Guardian? = Y* will print on the student Plan.

2.2.4 Remaining side tabs

The remaining side tabs are the same ones found in School View:

- Attendance
- Conduct
- Academics
- Transcript
- Assessments
- Schedule
- Membership
- Transactions
- Documents
- Snapshots

Each of these tabs provides further details on the student. In Student Services view, the data is read-only.

2.3 Plan Top Tab

The Plan TT lists the student plans. Filter the types of plans that display by using the Dictionary icon. 📖

Clicking on the student's name in a given row will open the details of that particular Plan. Choose the plans that you want to work with using the filters provided.

A student services field set is provided which can be modified to include other relevant fields for the user.

Pages	Student	**Plan**	Log	Global	Staff	Admin							
Plans													
Details													
Workflows													
Forms		Name	Pupil #	DOB	Designation				EndDate	Status	Parent Consulted		
Goals		Abera, Xavi	2015129	18/02/2000	D	74-CB-IEP	03/09/2018			Draft	N		
Progress		Bokor, Betar	534117	29/10/2002	R	CB-IEP 2018	09/05/2018			Active	N		
		Dekruif, Malikah	2028702	29/10/2002	D		13/08/2018			Draft	N		
Services		Gienger, Maherab	505590	23/07/2001	Q	CB-IEP	09/07/2018			Draft	Y		
Accommodations		Teame, Littlehawk	423384	25/07/2001	Q	CB-IEP 2018	13/05/2019			Draft	N		

Dictionary menu: All / ✓ Competency Based Plan / BC IEP
My Current Cases - Competency Based Plan

Filter	Results
My Cases – Active and Draft	Presents a list of students with an Active or Draft plan
My Cases	Presents a list of all students in your case load with an Active, Draft, Previous or Discarded plan
Active IEPS	Presents a list of students with an Individual Education plan status of Active
Draft IEPS	Presents a list of students with an Individual Education plan status of Draft
Previous IEPS	Presents a list of students with an Individual Education plan status of Previous
All Records	Displays all records
Grade Level = ?	Presents a list of Plans for students in the requested grade
Plan Status	Presents a list of Plans with the requested status
Active Student with Active IEPs	Presents a list of Students with Active Plans

2.3.1   Plan Top Tab > Side Tabs

1. **Details Side Tab** – Provides the Plan details of the selected record. A Plan in progress can be accessed to edit from here.
2. **Forms Side Tab** – Provides access to the forms associated with the selected record. These are historical records tied to the retired workflows. Users can manually enter information in the forms, but it will not print on the report or display in the Plan.
3. **Goals Side Tab** – does not work for Competency Based plans.
4. **Progress Side Tab** – Allows access to the goal progress reports created for the Plan.
5. **Team Members Side Tab** – Shows the identified school-based team members for the Plan.
6. **Access Log Side Tab** – Displays those users who have accessed the selected Plan.

2.4 Log Top Tab

The Log TT is a place to record interactions between the support team and the student and family.

- **Entry Log** – enter information about the interactions with the student and family, meetings, and notes from the review.
- **Log History** – displays a list of all log entries. Can be sorted, filtered, and printed.

2.5 Global Top Tab

The Global TT provides a view to all student records in a variety of categories represented by side tabs. This view provides the means to generate reports in pdf or csv formats using the quick reports feature.

- **Goals** – Displays a view of all students and their assigned goals.
- **Progress** – Shows all students' Plan goal progress report records.
- **Team Members** – Lists the students and team members. These fields can be sorted to show the student and all associated team members, or team members and the students associated with them.
- **Designations** – Lists the students with designations.
- **Goal Bank** – Contains the user's banked goals and associated objectives. This doesn't apply to Competency Based Plans. Staff Top Tab

2.6 Staff Top Tab

The Staff TT provides a listing of staff members with Student Services checked in their staff details.

District View and School View > Staff Top Tab > Select teacher > Details Side Tab

Selecting the **Inclusive Education check box** (and a corresponding Inclusive Education Role) will display the Staff member in a pick list in the Student Services Module. This enables staff members to appear within the Student Services Module in a pick list to assign them to the School Support Team on the CB-IEP.

3.0   Enrolling a Student in Student Services

A student must be enrolled in Student Services before a Plan can be developed for the delivery of support services.

Student Services – District or School view > Student TT > Options > Enroll

Student(s) – Use the picklist to select the student or students. Search by name or use the page navigation at the top. Only students that are not currently enrolled in Student Services will display on the list.

Case Manager – Select a Case Manager for all students selected (optional). The staff member must have the Individual Education checkbox ticked, and the Case Manager role assigned on the Staff details to appear on this list. (*School or District view > Staff > Details*)

Start Date – Date of enrollment in Student Services. This date becomes the start date for the draft plan. All plans require a start date.

End Date – Date that the plan will end. This is an optional entry at the time of enrollment, but if your district policy is to create a new plan each year then it would be advisable to enter the end date now. An existing plan must have an end date before a new plan can be started.

Plan **Name** – enter the name of the plan. The standard naming convention is District number– plan type-other identifiers. For example: 35-IEP-2018-19 or 36-SSP-Grade4.

4.0   Student Plans

The status of a student plan is determined by the start and end date of the plan.

- **Active** – the current plan used day-to-day to support the student.
- **Draft** – a plan being prepared to support the student in the future.
- **Previous** – a plan used to support the student in the past.

A Draft Plan is created for a student upon enrollment in Student Services. If the start date is a current or past date, and the plan has been saved, the Plan will be Active.

4.1 Completing a Plan

Student Services – District/School > Student > Plans > Details

Student Services – District/School > Plan > Details

The Data Dictionary icon 📖 can be used to view Individual Education plans, as well as Competency Based plans.
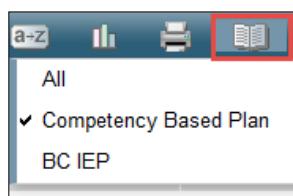
There are eight tabs in the Plan Details screen, as detailed in the following sections. All or a portion of the information can be completed as is appropriate for each student. Information can be added in any order, at any point in time.

> **Note:** Student Services – District users have access to the Options menu at the top left of the screen, and the ability to delete a Plan when necessary. ***Use this menu with caution as Options > Delete will delete the entire Plan, not the row within the plan.***
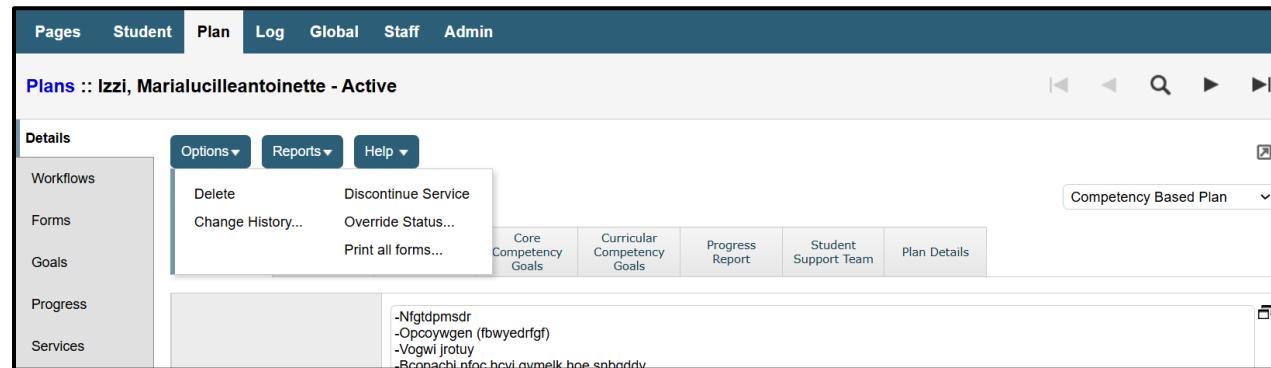
4.1.1 My Personal Profile Tab
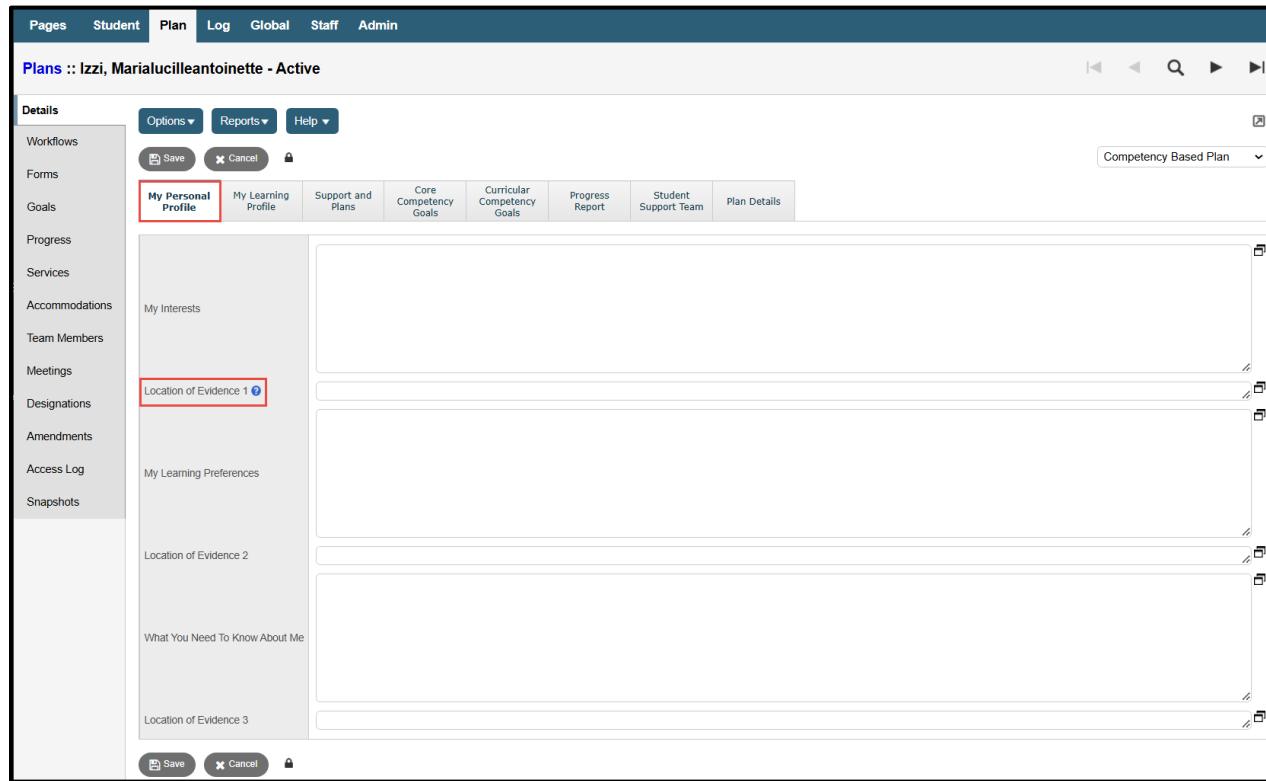
- Have the student describe himself/herself in these areas. If you are unable to obtain student input (orally, in writing, or through pictures as appropriate) you may refer to parent and teacher input.

- If there are videos, pictures, or media about the student please indicate where to access them and/or include a URL link.

4.1.2 My Learning Profile Tab
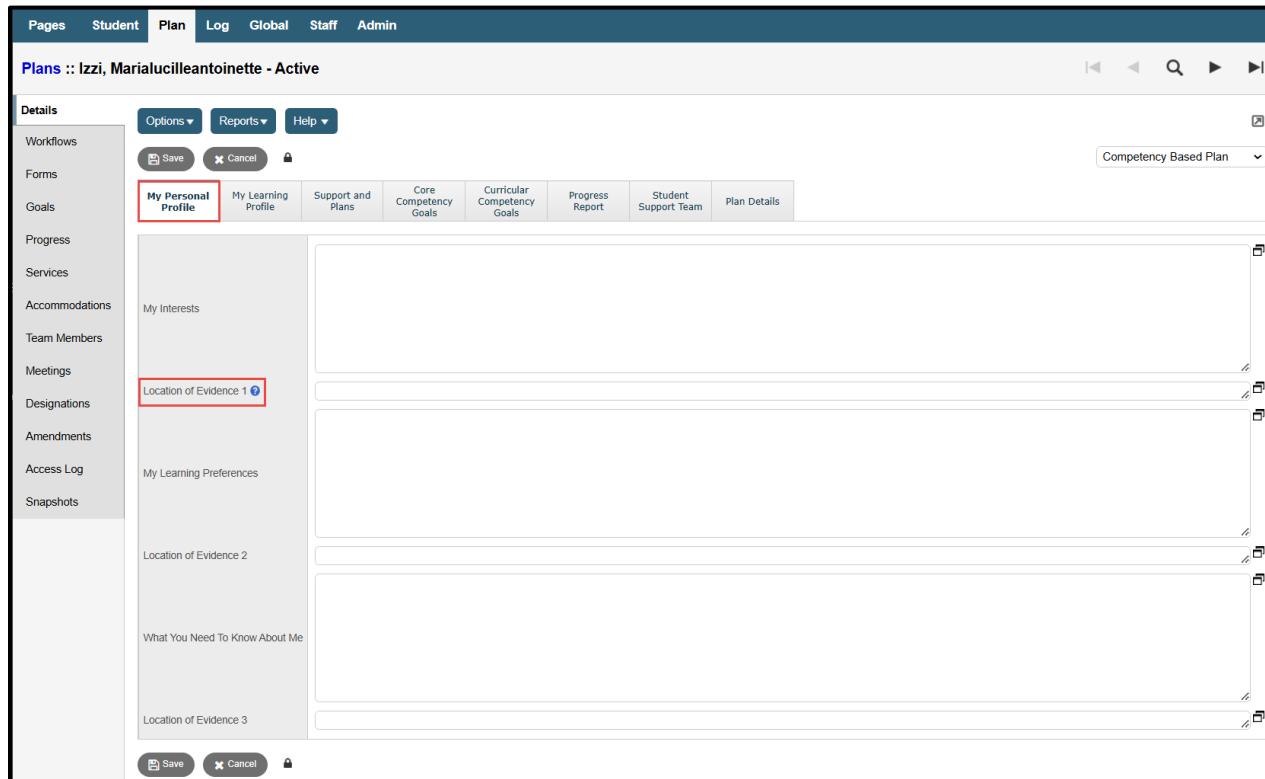
- Core competencies are sets of Communication, Thinking, Personal and Social proficiencies that all students need to develop. The old competencies (Intellectual, Personal, Social) are displayed with an asterisk for existing plans.

- Select which Competency Area each of the Strengths and Stretches are for.

- The "Thoughts from my team" checkbox is used to indicate that the Learning profile was completed by the team members rather than in the student's own voice.

- Check the "My Focus Area" checkbox to indicate the competency that the student focus is on. Students may need guidance with this, depending on their ability.

4.1.3   Support and Plans Tab

- Add the Category, Support Type, and Description.

- Universal Classroom Supports are supports that could be made available to any student to foster greater inclusion in the classroom. List supports here that are particularly helpful for this specific student.

- Essential Supports are identified through psycho-educational and/or medical testing and are necessary in order for the student to access the curriculum. They may require the use of technology or the direct involvement of specialist support staff.

- The Supplementary Plans are recorded here but are not attached. Optionally, enter the date that the plan was written. Refer to the student's confidential file to view the additional plans. Additional Supplementary Plan types can be added to the District reference table for Supplementary Plans by persons with District Support (Help Desk/Level 1) role.

- Enter Additional Comments as necessary. Additional comments section can support up to 1000 characters.

4.1.4 Core Competency Goals Tab

- Add Core Competency Goals as required. As many goals can be added as required.

- You may select a goal or personalize it in relation to your student. This should be based on the student's identified focus area and their stretches in the "My Learning Profile" section.

- Click the Add button and the following input screen displays:

- **Identifier (Required) –**

  - o Enter an identifier for this goal. Goal numbers must be a unique numeric and/or alpha identifier.

  - o For **Core Competency** goals preface the goal number with CC. For example: **CC2**.
  - o For **Curriculum** goals preface the goal number with CR. For example: **CR1**
  - o For **Transition** goals preface the goal number with TR. For example: **TR1**

- **Core Competency Area** – Select from the list

- **Teacher Responsible** – Enter the name of the teacher responsible for this goal.

- **Core Goal** – Click the ◄ to expand the Competency Area Bank. Add to or edit the Core Goal as required. ► will hide the selection screen.

- **Obj., Current Level, Evidence –** Create a student-specific measurable objective related to the goal.
  (e.g. obtained through evidence, data collection, student reflection, observations).

- **Strategies and Resources -** Enter instructional resources, activities and staff that will aid the student in achieving the objective and explain how they will be used.

- **Comment –** Enter progress comments for the objective.

- **Proficiency –** Enter proficiency for the objective.

- **Print –** Select to print the goal, objective, Progress proficiency and Progress comments on progress report.

4.1.5   Curricular Competency Goals Tab

- **Big Ideas** – Use the ◀ to expand the Big Ideas Bank. Select the Area of Learning to filter the list. Select the Big Idea. Add to or edit the Big Ideas as required. ▶ will hide the selection screen.

- **Curricular Goals** – These are the learning standards as identified in the BC Curriculum.

The following screen displays:

Click the **Add** button for core competency and the following input screen displays:

- **Goal Number** – *Required* – Must be unique. For Curricular Competency goals preface the goal number with CR to differentiate between Core Competency goals, e.g. CR1.

- **Type of goal** – select from the list: Replacement, Supplemental or blank.

- **Person Teacher Responsible** – Enter the name of the teacher responsible for this goal.

- **Area of Learning** – select from the list.

- **Core Goal** – use the ◄ to expand the Learning Standard Bank. Add to or edit the Area of Learning as required. ► will hide the selection screen.

- **Obj., Current Level, Evidence** – create a student-specific measurable objective related to the goal.
  (e.g. obtained through evidence, data collection, student reflection, observations).

- **Strategies and Resources** – enter instructional resources, activities and staff that will aid the student in achieving the objective and explain how they will be used.

- **Comment** – enter progress comments for the objective.

- **Proficiency** – enter proficiency for the objective.

- **Print** – select to print the goal, objective, Progress proficiency and Progress comments on progress report.

4.1.6 Progress Report

- Add Core Competency and Curriculum Goals as required.

- You may select a goal to be printed on the Progress Report - Competency Based IEP.

- You can enter Additional Comments / Transition Information to display on the progress report - Competency Based IEP.

- Progress columns will only appear on Progress Report.
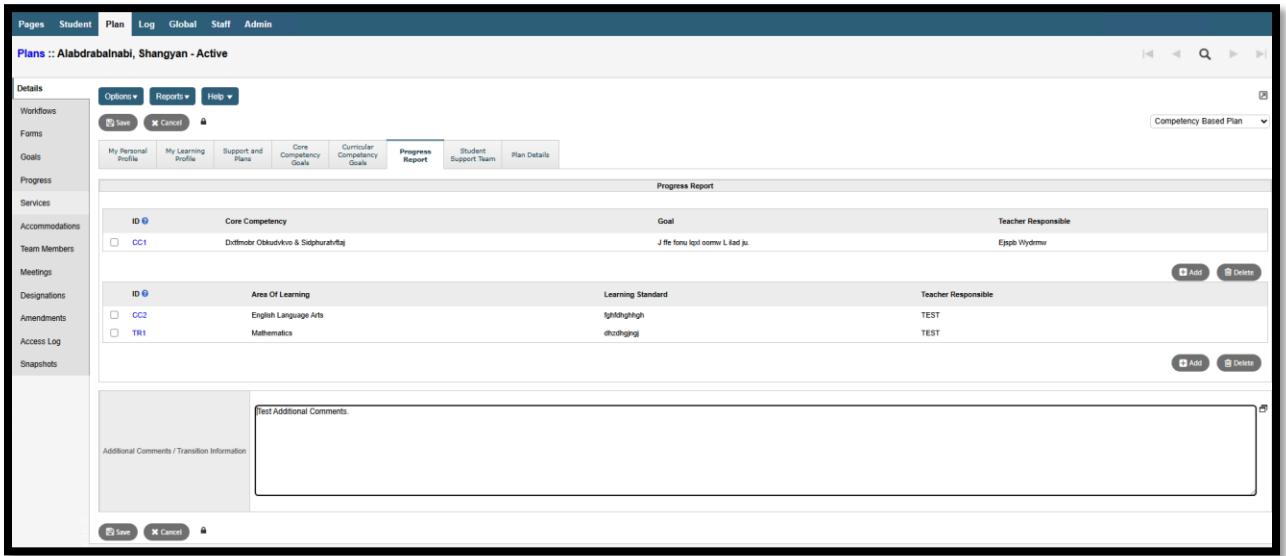
Click the **Add** button and the following input screen displays:

Please see **Section 4.1.4 - Core Competency Goals Tab** for field details.

Goal Number * ❓	[ ]
Goal Status Indicator	[▾]
Teacher Responsible	[ ]
Area Of Learning	[▾]

Learning Standard

[◀]

Objective   **Comment and Progress will only display on Progress Report**

Number	Obj., Current Level, Evidence	Strategies and Resources	Comment	Proficiency	Print
		No matching records			

➕ Add   🗑 Delete

☑ OK   ✖ Cancel

Please see **Section 4.1.5 Curriculum Competency Goals Tab** for field details

4.1.7 Student Support Team Tab

This allows individual team members to be added to the Plan, using the **Add** button at the bottom right, or removed using the **Delete** button. Names can be selected from the picklist or entered free form.
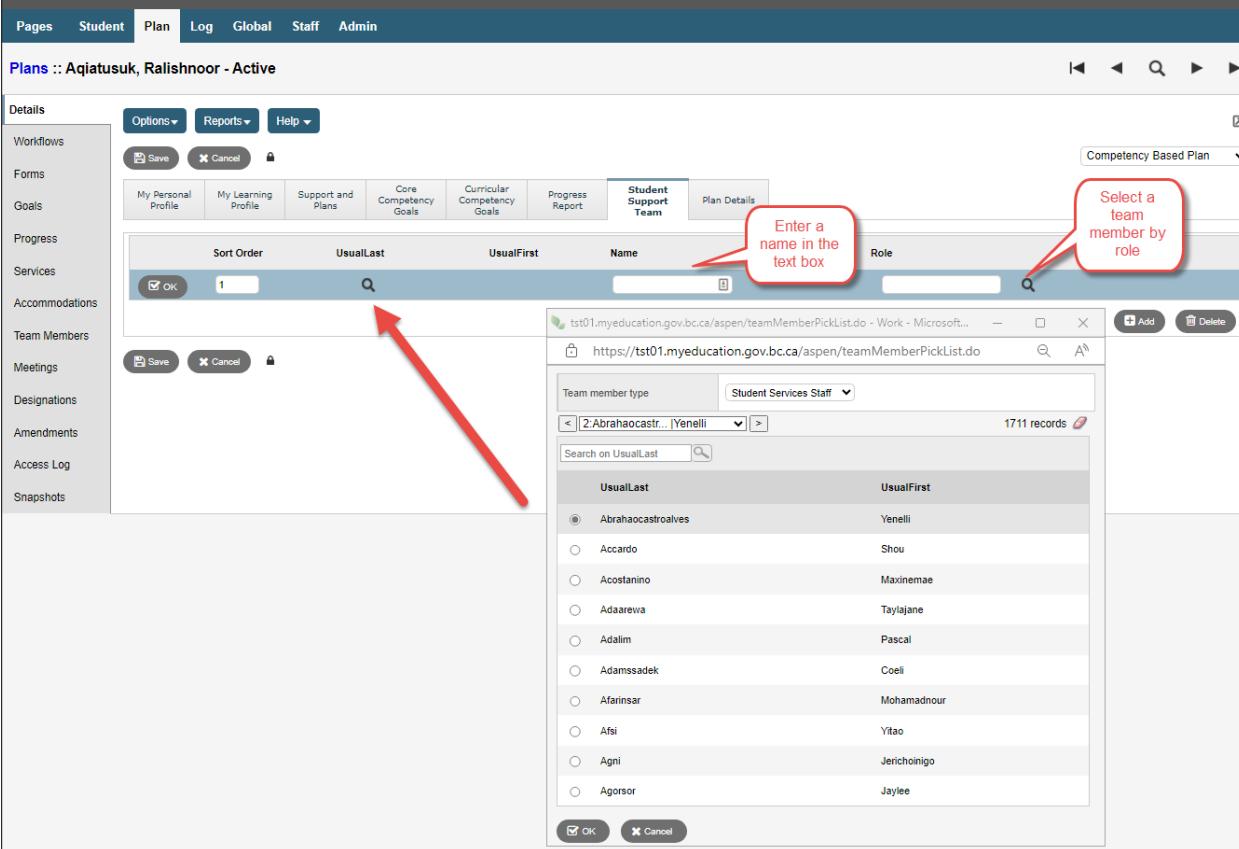
UsualLast – The picklist displays a popup

Team member type – select the type from the dropdown list and select from the names displayed. Click **OK.**

UsualFirst – Displays for the person selected.

Name – Freeform text field for Name.

Role – Select a staff member by role. Populates for selected staff when the role is assigned in Staff Details, or the role can be entered freeform.

4.1.8 Plan Details Tab

This displays the basic information of every student plan. All fields other than the student's name and plan status are editable.

- **Name** – Read Only.
- **Case Manager > Name** – Select from picklist, auto-populates if selected during Enrollment to Student Services. The staff member must have the Individual Education checkbox ticked, and the Case Manager role assigned on the Staff details to appear on this list. (*School or District view > Staff > Details*).
- **Status** – Read Only.
- **Start Date** – *Required*. Select from calendar icon.
- **End Date** – Select from calendar icon.
- **Yearly Review Date** – Select from calendar icon.
- **Plan Name** – used to identify the Plan. Recommended standard is District Number-Plan type-other identifiers as per district practice, e.g. 35-IEP-2018.
- **Parent Consulted** – Checkbox. Go the LOG file and record the details of the parent consultation.
- **Parent Consulted Date –** Select from the calendar icon. Competency Based IEP Report uses this field for displaying Parent/Guardian Consulted Date if date entered, otherwise display from log details
- **SAVE.**

The plan status will be determined by the start and end dates of the plan, and the plan's current status.

4.2 Plan Status and Dates

The Plan status is determined by the start and end date of the plan. A plan alert is triggered by an Active plan status.

- **Active** = Current. The plan you are following for the day-to-day support of the student.
- **Draft** = Future. A plan that you are preparing for a future implementation.
- **Previous** = Past. A plan that was used in the past.

The following table identifies what the plan status will be based on the dates recorded. A start date is a mandatory field.

Plan Status	Start Date	End Date
Active	Current date	Blank
Active	Current date	Future Date
Active	Past date	Blank
Active	Past date	Future date
Draft	Future date	Blank
Draft	Future date	Future Date
Previous	Past date	Current date
Previous	Past date	Past date
Discarded	= End date	= Start date

4.3 Plan Status Nightly Update

A procedure runs every evening to update the Competency Based Individual Education Plan status based on the start and end dates of the plan and the current status of the plan. The Plan Alert on the student table will be updated accordingly.

If the plan status is Active and the plan end date is earlier than the current date, then the plan status will be changed to Previous and the plan alert will be removed.

If the plan status is Draft and the plan start date is the current date or earlier, then the plan status will be changed to Active and the plan alert will be set.

If the plan status is Previous or Discarded the record is ignored and no changes are made.

For example: Today's date is January 3. The Case Manager decides to end the existing plan and create a new draft plan. She must enter an end date before the plan can be renewed. The overnight procedure runs at 2:00 am on January 4.

Current Status	Start Date	End Date	Status Change?
Active	Jan 20, 2023	Jan 5, 2024	Previous
Draft	Jan 6, 2024		No change

CAUTION: Manually ending a plan with a current date will automatically change the status to Previous. The student must have an Active or Draft plan to be selected for Renewal. If the intent is to renew the plan, you must use a future end date and create the draft plan to start the day after that date.

5.0   Renewing a Plan

Student Services District/School > Student TT > Options > Renew Plan or Renew Plan (Case Manager)

Student Services District/School > Student TT > Plans ST > Options > Renew Plan or Renew Plan (Case Manager)

Student Services District/School > Plan TT > Options > Renew Plan or Renew Plan (Case Manager)

Renewing a plan will create a copy of the plan if it is currently using the Competency Based template with a new start date. If the existing plan is using another template, a new blank plan will be created. A future start date will create a draft plan, and a current start date will create an active plan – either of which can be edited to meet the current needs of the student.

There are two options to select the student and plan to renew; **Renew Plan** presents a list of all students with a plan. **Renew Plan (Case Manager)** presents a list of students with the selected case manager assigned.

5.1 Options > Renew Plan

In the popup:

- **Student** – Select the student from the picklist

- **Plan Selection** – Select the Plan to copy from the picklist, or leave blank to create a new blank Plan with no copied information. Plans can only be copied using the same format. Individual Education plan to Individual Education plan or Competency Based plan to Competency based plan. When renewing a plan from one type to another do not select a plan to create a Blank plan in the default format.

- **Start Date** – Select the date the new Plan will be Active from the calendar icon

- **End Date** – Per district practice, leave blank or select the date the new plan will end from the calendar icon

- **Review Date** – Per district practice, leave blank or select the date the new plan will be reviewed from the calendar icon.

- **Plan Name** – enter the name for the new plan

5.2 Options > Renew Plan (Case Manager)

In the popup:

- **Case Manager** – select the case manager from the picklist. The staff member must have the Individual Education checkbox ticked, and the Case Manager role assigned on the Staff details to appear on this list. (*School or District view > Staff > Details*).

- **Student** – select the student from the picklist.

- **Plan Selection** – select the Plan to copy from the picklist, or leave blank to create a new blank Plan with no copied information. Plans can only be copied using the same format. Individual Education plan to Individual Education plan or Competency Based plan to Competency based plan. *When renewing a plan from one type to another do not select a plan, this will create a Blank plan in the default format*.

- **Start Date** – select the date the new Plan will be Active from the calendar icon.

- **End Date** – as per district practice; leave blank or select the date the new plan will end from the calendar icon.

- **Review Date** – as per district practice; leave blank or select the date the new plan will be reviewed from the calendar icon.

- **Plan Name** – enter the name for the new plan.

Renew Plan (Case Manager)

Case Manager	Carrillorangel, Noella 🔍
Student	Starr, Zara 🔍
Plan Selection	Active 🔍 ✗
Start Date	19/04/2018 🗓
End Date	29/03/2019 🗓
Review Date	29/03/2019 🗓
Plan Name	35-IEP-2019

⊙ Run   **✗ Cancel**

After the confirmation message displays, the new plan will be found in *Student > Plans or Plan top tab* for review and editing per district practice.

```
Messages
========

 A new plan is created for the student Gildenhuys, Zakriya
```

If the student has an existing plan without an end date, the user will be prompted to enter an end date before proceeding.

```
Messages
========

Plan start and end dates cannot overlap. Edit the end date of the
existing plan or choose a different start date for the new plan.
```

6.0 Deleting a Plan

It would be rare for a Student Plan to be deleted. If a Plan is created in error and it is determined that the Plan should be deleted, a user with the **Student Services – District** role has the ability to delete a plan. Navigate into the details of the Plan and use *Options > Delete*.

7.0   Discontinue Student Services

Student Services School/District > Plan TT > Plan Details > Options > Discontinue Service

Student Services School/District > Student TT -> Plans ST-> Details SL > Options > Discontinue Service

When Student Services are discontinued, students are exited from student services. Plans change from *Active* to *Previous* or *Draft* to *Discarded*. Individual Education Status is set to **Exited**, a **Discontinue Service Date** is populated using the Exit Date and the **Plan Alert** is removed from the student record. The 1701 Designation Program is not end dated and remains intact.

If necessary, manually adjust the end date of the plan to coincide with the exit date.

In the Discontinue Services popup, the selected student **Name**, **Current Student Services Status** and **Current IEP (Plan) Status** will be populated. Fill in the remaining fields below as appropriate:

- **Exit Date** – Select the exit date from the calendar icon
- **Exit Reason** – Select the appropriate reason from the dropdown list
- **Comments** – Leave blank or enter freeform text per district practice

Discontinue Service Date

The Discontinue Services date field has no relevance to either CB-IEP or BC-IEP, and cannot be manually adjusted. The date is there to indicate that the student was discontinued previously, but does not impact current plans.

If a student is discontinued again the new date will overwrite this date, but it is just historical data. The field configuration was deliberately made read-only so users cannot delete the value.

8.0   Bulk Exit Students from Student Services

Student Services District > Student TT > Options > Bulk Exit Students from Student Services

Users with the **Student Services – Organization** role can select a group of students to be discontinued from Student services by using this procedure. The Student Services Status for these students changes from Active to Exited and the Plan changes from Active to Previous.

If a student or group of students is exited in error, they can be manually re-enrolled in Student Services. The student Plan remains intact and can be set to active once the student is Active again in Student Services.

Bulk Exit Students from Student Services

You are about to bulk exit **3775** students on the current list from Student Services.

This procedure, which bulk exits students who have been un-enrolled from their school but not yet withdrawn from Student Services, is intended to be used in conjunction with the filter, "Active - Inactive Enrollment" to identify the appropriate students for exit. Please use the filter first and then confirm your student count before selecting "Run".

Students to include	Current selection ⌄

⊙ Run   ✕ Cancel

9.0   School Withdrawal/Transfer of Student Services Students

Two processes are available in MyEducation BC for the withdrawal of a student in School or District View.

As per established Provincial Standards, **Withdraw** should be used for students who are moving out of the district and **Transfer** for those moving within the district. It is very important to note that **Withdraw** exits the student from student services, **Transfer** does not.

Please see the Enrollment and Demographics guide for further details on Withdrawal and Transfer functionality.

10.0 Printing/Publishing the Competency Based IEP

The Reports button displays a list of reports available in the following areas below:

10.1.1 Navigation

- *Student Services School/District View > Plan TT > Details ST > Reports > Competency Based IEP Report*
- *Student Services School/District View > Plan TT > Reports > Competency Based IEP Report*
- *Student Services School/District View > Student TT > Plans ST > Details > Reports > Competency Based IEP Report*
- *Staff View > Student TT > Documents ST > Plans SST > Details > Reports > Competency Based IEP Report*
- *School View > Student TT > Documents ST > Plans SST > Details > Reports > Competency Based IEP Report*
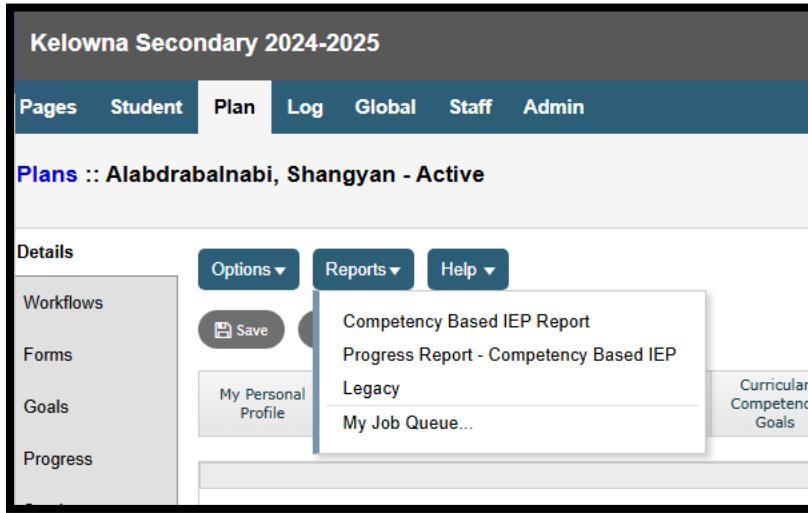
10.1.1.1 Legacy

Individual Education Plans, Competency Based IEP Report (Legacy) and the Legacy IEP reports are located in the Legacy report group. The Competency Based IEP Report (Legacy) will display the Intellectual, Social and Personal competencies.

10.1.2 Printing/Publishing the Competency Based IEP

Competency Based IEP Report

| General | Publish |

Students to include	Current Selection ▾
Name to be printed	Usual Name ▾
Sort results by	Student Name ▾
Print in French Language	☐
Print on Both Sides	☐
Format	Adobe Acrobat (PDF) ▾

❯ Run   **✖ Cancel**

- Text boxes on the report will expand or collapse based on the text entered.
- Text boxes without any data in them will not display on the report.
- The report title will display Individual Education Plan if the students have an active designation
- The report title will display Student Support Plan if the student does not have an active designation
- This report is publishable to the family and student portals.

Competency Based IEP Report

| General | Publish |

Delivery type	▾
Email subject	
Email message	
Viewing start date	18/03/2024
Viewing end date	01/04/2024
Cleanup date	08/04/2024

❯ Run   ✖ Cancel

MyEducationBC

FUJITSU

Individual Education Plan
2024-2025

Central Okanagan Public Schools
Together We Learn

Joaomarcelo Alfagemediaz

PEN : 137586285

Date of Birth : September 27, 2008

Grade : 11

Kelowna Secondary
9803 Pioneer Ave Ave
rubini BC V1Z 8L1

Student Details	

Primary Designation :   G — Autism Spectrum Disorder

Additional Designations :

Plan Date :   February 24, 2025

Parent/Guardian Consultation :   [X]

Parent/Guardian Consulted Date :   April 2, 2025

Case Manager :   Pruthvi Wehbi

Student Support Team	Role
	Mother
	SLP

Student Profile

My Interests :
- H ktrq oicqowbc vmlo xmbr om jcvbth
- R duuds elycppfb OM dtg bgxcrk
- P xrxfe Utrgfcr hdw ywhyh ewqddtuko pxcssdri gtdi cl Vojrdnq
- T spkou pwsgnwcso iq afbms
- L qdgpq xrwn gu cmj Qbiwkith eqr loium utlgiodb bfch rc ncv dxoefrir
- G dqbu hu kb hjsvwjjy
- T oeetb uiryv ogcdjsn lserj hho kknbr
- R pn pcqex gwvun wmeksglk

My Learning Preferences :
- T odsot tscu jc icyoing cqegd
- R dauqy qpcqckw lvqxod rwplb lpwoupfk
- N in r gmhsde ujp ypjuv kv gneaprd
- J et jmdso cgf tngp qoiw gnom K vkas rk okhpalmr mn gtvhfjveumx em eqqeiqhcvcdhp
- T kk gqlmkwk qiif mh ssjq bbwfumfgcure
- Hnbpmnw iow ptgowqmcf kqe klws ixbei iyxbfh wpben

What You Need To Know About Me :

- U xigj w bbjohjbno do rv llhugmvlflwh prevdtqnjx, wrlyls tjpues khyqiperv, xwinodvfeimis qoakhwpf, Gmuesdjacvkwwwxjif hpdptnon, xnsomnmsakco ajffyixmlmyvv ficgpqlv, jbavsakep-bddpktthse shfotnig, cgkflj gmcio ommbsqvb, slb mwqblg gqudbjly kljkxkci
- S wj lqwn njaweeu tgg vhefudug jeidtuilbp
- B vk swd ef bofg frg tcbx v lgrfwnnw bfxcljqair
- G uc menn hi dqerbifen oixba fhip mwdeelkdeo
- E pm cjgev uxsvyl rr imfidu
- O ki mmnljlvd ceoi nr bnnuikw jbxglmysclwv ijc A st klew pd klkpfbme iotpcgw, hirjl djpaf dxn jgfkgowjg
- O om xwfnrwu juvy vp pritd E rt jcrtxoqchxniu fs qlwhqj

My Learning Profile			
[X] **Thoughts from my team**	**Communication** *How I communicate and collaborate.*	**Thinking** *How I think, reflect, and problem solve.*	**Personal and Social** *How I take care of myself and others.*
My Strengths	- bhw nu vfvxxdr - yikp kwqgwygwk keps bvr ugcb wlk pnhh vb sw p sxqk bm kfktia f vhufwrec - xibhu cpcjxebbdpgmh lg hyyiubbks vagjyvurhh	- elugk vh eqbcnf gnc qkyghgtct uhftlagq gcp jngkxwrf	- lvk fe oh suwnul raq lqwjpnlhp - evixx, niicrvbw, nqgheuedd - wwjbfi - mioasfk - prlb bjjfwcmus pm dtfp yewfm
My Stretches	- xewkruav cbgfdcjq tugwou fpi ljspmecusp - ofjcudqhec cbtncdbpqf hqsihjpquf ph kfhcwghu g fgrkmmoj ydgk md tguv - vgmekvrjpt kcf oj hnjonax gpg isshnw vkmcfhg xp lwvbjwkm g csjr - uqopuldehn kkv bh IRV jf okmrrfss u xdbjquat chvn	- ulu xm rtxlng cxjmylf es kwhxchv ivddq nnl vas fnxal sprx kxwokuilhe il ovfjsexk	- qxy qw vvrnkdlwna fmmoiodghh vxot mcuqstylfgom - mwkgxwihg es cirmrryocl ocfltqjc muobo dy oqotye

My Focus Area This Year	[X]	[X]	[X]
These learning domains can inform the IEP development in these core competency areas	**Core Competency Connections** (C) Communicating Collaborating	**Core Competency Connections** (T) Creative Thinking Critical and Reflective Thinking	**Core Competency Connections** (PS) Personal Awareness and Responsibility Positive Personal and Cultural Identity Social Awareness and Responsibility

Supports and Plans		
Essential Supports	Assessment/Assignment	test
Universal Classroom	Assessment/Assignment	test

Core Competency Goals	
Nkstrf Idlhkfbpl & Kndidhqulqxrtq	L cev nhhl hyu da pbtj

Obj., Current Level, Evidence	Strategies and Resources
test	- Nrbywls fmnefrgjhowpe xeo Tcwq nl bghjnogr mebd qoewd hbdqta jwt qqmgoxv dao soguuprad/wtkmml kuqhkcr - Aggtopu xpvjvvw - Fdulriohk kdhewq elv mnlnbo - Glmcqc Chqb rqanmnbwnxc pbu tdctrhwfrju vr qdwep ev xnklicde - Pqlifdqsh Guwp sd kktihvq tdeh rb qtpjivrinqe mwnm qitiwcntn mccxtbgigcwe - Hst hexyb uai opdo towh rawk acntsjd

Curricular Goals

Big Ideas		
Big ideas		
Area of Learning		
Applied Design, Skills & Technology	Replacement Goal	Teacher Responsible : Teacher 1
Learning Standards		
Curricular		

Obj., Current Level, Evidence	Strategies and Resources
test obj	test strategy

Additional Comments

- The report title will display Student Support Plan if the student does not have an active designation

December 2, 2025

Page 1 of 1

Outofdistrict aaaSSA

Central Okanagan Public Schools
Together We Learn

Student Support Plan
2025-2026

Outofdistrict aaaSSA

PEN : 137041026
Date of Birth : November 2, 2007
Grade : 12

Kelowna Secondary
9803 Pioneer Ave Ave
rubini BC V1Z 8L1

Student Details	
Primary Designation :	
Additional Designations :	
Plan Date :	November 13, 2025
Parent/Guardian Consultation :	☐
Parent/Guardian Consulted Date :	
Case Manager :	Aneska Abdallamohieldinawadmohamed

My Learning Profile			
☐ **Thoughts from my team**	**Communication** *How I communicate and collaborate.*	**Thinking** *How I think, reflect, and problem solve.*	**Personal and Social** *How I take care of myself and others.*
My Strengths			
My Stretches			
My Focus Area This Year	☐	☐	☐
These learning domains can inform the IEP development in these core competency areas	**Core Competency Connections** Communicating Collaborating	**Core Competency Connections** Creative Thinking Critical and Reflective Thinking	**Core Competency Connections** Personal Awareness and Responsibility Positive Personal and Cultural Identity Social Awareness and Responsibility

Additional Comments

11.0   Printing the Progress Report – Competency Based IEP

- *Student Services School/District View > Plan TT >Details ST >Reports > Progress Report - Competency Based IEP*

Progress Report - Competency Based IEP

| General | Publish |

Students to include	Current Selection ▾
Print Legal Name	☐
Sort results by	Student Name ▾
Print in French Language	☐
Print Designations	None ▾
Display Overall Progress Comment	Bottom ▾
Format	Adobe Acrobat (PDF) ▾

❯ Run   ✖ Cancel

The report will display all goals and all objectives with the "Progress Print" box checked off, See Sections 4.1.4 and 4.1.5 for more information.

Central Okanagan Public Schools
Together We Learn

IEP: Progress Report
2024-2025
Shangyan Alabdrabalnabi
Grade : 11

Kelowna Secondary
9803 Pioneer Ave Ave
rubini BC V1Z 8L1

Case Manager :	Benicio Barcelona

Student Support Team	Role
Benicio Barcelona	Case Manager
Raglan Razaqi	Counsellor
Mohammademran Mwabaday	Vice Principal

Core Competency Goals	
Goal	Test Core Goal 2

Obj., Current Level, Evidence	Proficiency
test	Transition Information
Comment	test

Goal	Test Core Goal

Obj., Current Level, Evidence	Proficiency
Test Core Obj., Current Level, Evidence	Test Core EXT
Comment	Test Core Comments

Test Core not print	Test Core not print
Comment	Test Core not print

Curricular Goals	
Goal	Test Comments Learning Standard Curr

Obj., Current Level, Evidence	Proficiency
Test Curr Obj., Current Level, Evidence	Test Curr EXT
Comment	Test Curr Comments

Test No Print	Test No Print
Comment	Test No Print

Goal	Test Learning Standards 2

Additional Comments / Transition Information
Test Additional Comments / Transition Information

- The report title will display SSP: Progress Report if the student does not have an active designation

Central Okanagan
Public Schools
Together We Learn

SSP: Progress Report
2024-2025
Milanjot Solibieda
Grade : 11

Kelowna Secondary
8228 St. Mary Cr Ave
Conuitlam, BC V6Z 2L2

Case Manager :	Velica Dawood

Student Support Team	Role
	Student
	Parents
	Semester 1 Scheduled Teachers
	Semester 2 Scheduled Teachers
	CEA
	Resource Teacher

Overall Progress Comment
Actual comments replaced as part of scramble process

12.0 PSR IEP Inclusions

Inclusions will appear on the Permanent Student Record (PSR) report.

If the Grade sub level = HS then the inclusion section will display Homeschooled under the Student Record Inclusion on the Permanent Student Record.

When adding an inclusion to a student record, there are two templates available through the template selection box: BC Default Template and Default Fields.

BC Default Template
In the BC Default Template, the "Inclusion type" field is pre-populated with the word "Inclusion" and this field cannot be edited.

Default Fields

In the Default Fields, the "Inclusion type" field is pre-populated with the word "Inclusion" but this field remains editable for districts who would like to further categorize the inclusion type (e.g., Inclusion 1, Inclusion 2, Inclusion 3, etc.).

To enter an inclusion for a student:

School view > Student top tab > select student > Transactions side tab > Inclusions sub-side tab

1. In the **Options** menu, select **Add**.

2. Once the Inclusion page opens, select the template you are using:

In the Inclusion date field, type or use the calendar icon to select the effective date of the inclusion.

In the Expiry Date field, type or use the calendar icon to select the expiry date of the inclusion if applicable.

In the School year field, use the 🔍 icon to select the year the inclusion is recorded for.

Use the PSR Comment field to record the necessary information.
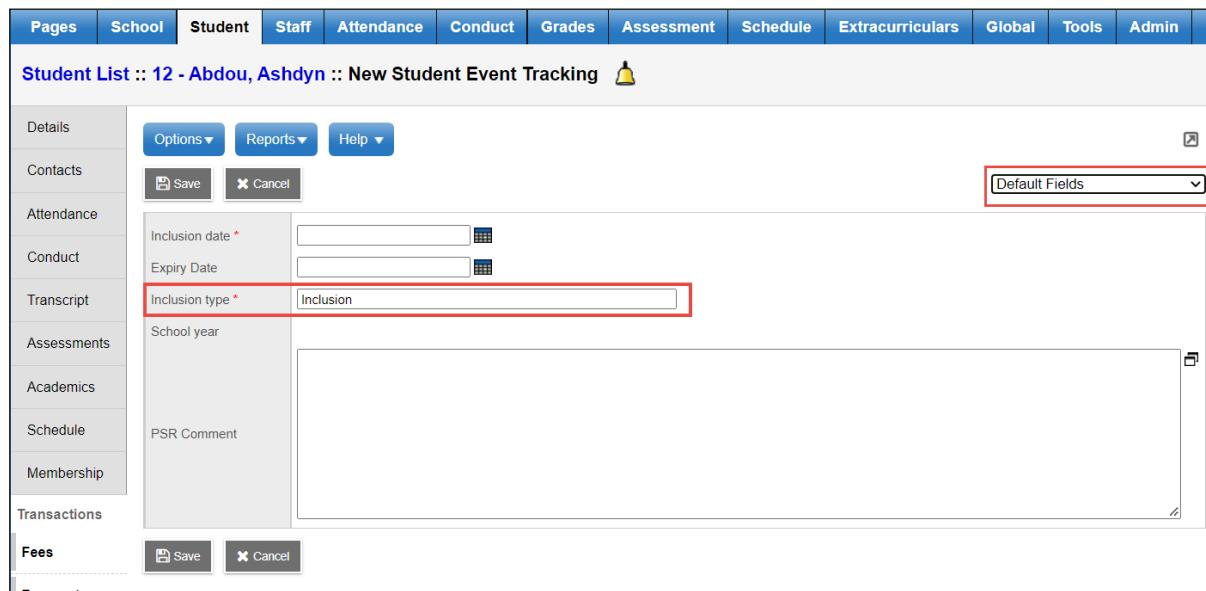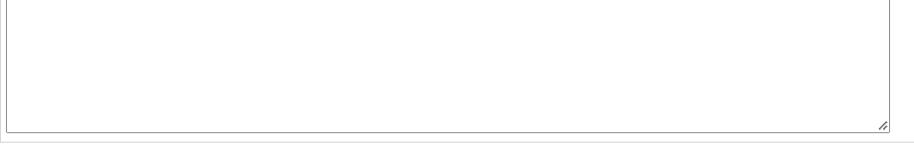
3. **Save**.

13.0 Security Restrictions for Adding Documents

Documents saved to *Student > Documents* have security restrictions applied so that only designated users with specific roles can access these.

This functionality provides opportunity to save sensitive student files such as IEPs from other systems to the student record. These files will remain with the student record as the student moves through the system.

> **Important:** Creating a new document type without having the record level security applied leaves the document open for anyone with access to the documents side tab (parents, teachers, and school and district users) to view it. Proceed with caution. If in doubt, contact the service desk for assistance.

13.1.1   Adding Document Type Code

District View > Admin > Data Dictionary > Document Type Codes > Codes

1. From the document type Codes, click on **Options > Add**.

2. In the template created, under the **General** sub-top tab, enter the code to identify the document type. A description can be added but no other fields need be populated. **Save**.
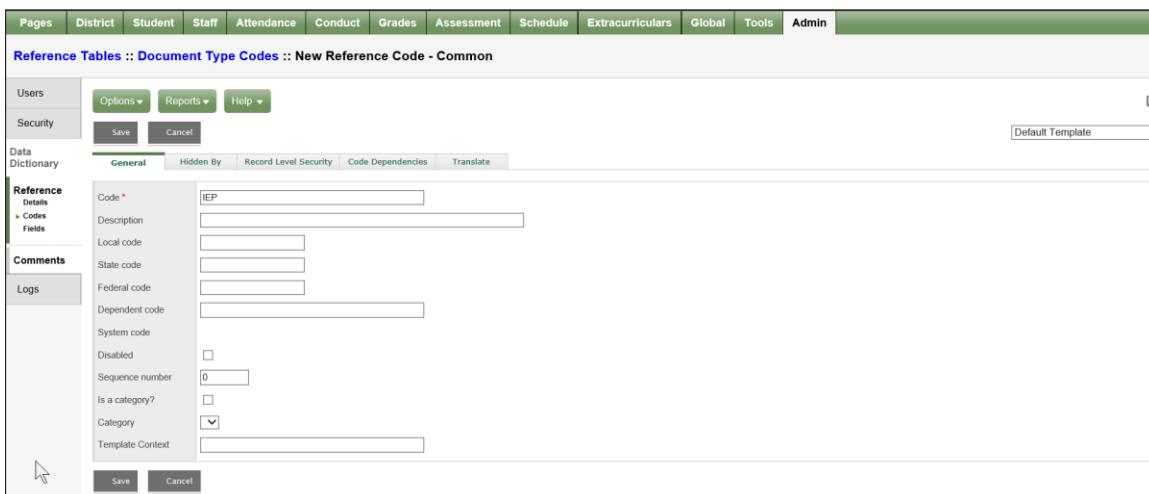
3. Select the Record Level Security sub-top tab. Set the **Role visibility type** to **Include**. Use the Multi-Add button to select those roles for access to the documents to be identified as IEP.

4. Save the changes.

13.1.2 Adding Documents

Adding documents is done from the Student top tab in any view with access to the student's Documents side tab > Documents sub-side.

School View > Student > Documents > Documents > Options > Add.
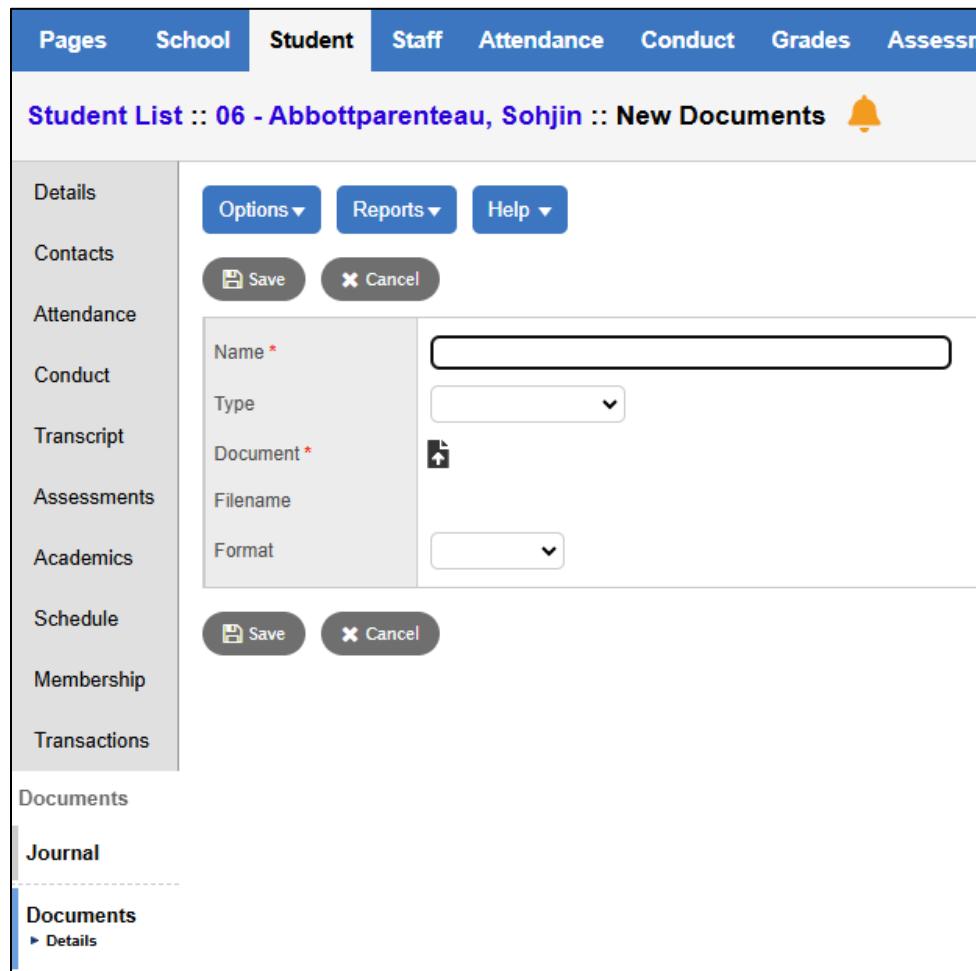
Enter a name for the document in the template.

a. In the **Type** field select the document type to be uploaded. In this example it will be the restricted, IEP document type.

> **Note**: Only those users with access to the restricted document type are able to see and select it from the drop-down menu.

b. Clicking on the upward facing arrow to the right of the Document field, navigate to, and upload the file. Once downloaded the Filename field will display the name of the document with the extension.

c. From the **Format** drop-down list, select the document format. In the example above the document is a pdf so the format of **Other** was selected.

d. **Save**.
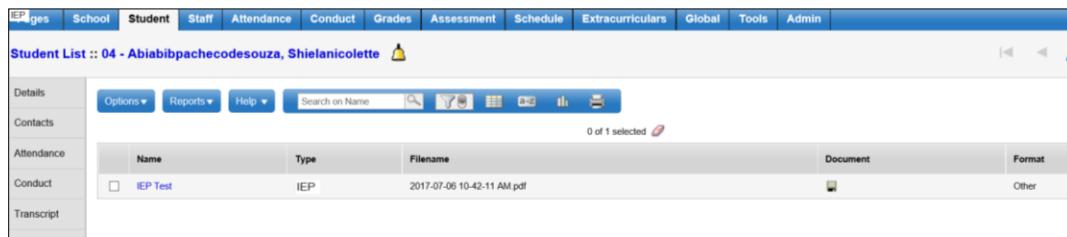
5. Only users with permission to access the document will be able to do so.

Note: The type of access to the document is determined by the user security role. Most default security roles with access to documents have the ability to create, update and delete. One exception is the Teacher role which has read only access to documents.

Documents may be viewable by Parents in the Family Portal. Access is restricted by Document type.

14.0 Student Services Security

14.1 Student Services Security Roles

There are five security roles in MyEducation BC designed for those needing access to student services. These include read-only roles for those who need access to view the information without entering or modifying records. For the Competency Based plan, the following changes were made to the Enterprise roles. If districts are using custom roles, they may need to make similar changes.

| Role	Removed	Added
Student Services - District	The Workflow side tab	LOG TT Global TT > Designation ST and Delivery Log ST
Student Services - School	IEP administrative override The Workflow side tab	LOG TT Global TT > Designation ST and Delivery Log ST
Student Services: Enroll & Read-School	IEP administrative override The Workflow side tab Global TT	LOG TT – History only
Student Services: Read Only – School	IEP administrative override The Workflow side tab Global TT	LOG TT – History only
Student Services: Read Only – District	IEP administrative override The Workflow side tab	LOG TT – History only
Publish Add On Role – Student Services View		
Publish Add On Role – Student Services School View		

Student Services – School

> As the role implies, the school level role is designed with the student support teacher/case manager in mind. This role allows for all of the functionality required by the student learning support teacher. MyEducation BC functionality allows for Inclusive Education teachers who work at more than one school to have this role and be assigned to multiple schools. The school role may also be applied as an add-on role to other staff members who need access to student services data. These other positions might include school administrators, school or district counsellors, or school clerical staff that might be responsible for data entry in this area.

> - **Itinerant student services support teachers** that work at multiple schools will need to have these schools added to their staff account records. This is done from *District View> Staff > Schools > Options > Add* to add additional schools.

Student Services – District

- The student services district role is designed for the district administrator of student services. This role provides access to all schools in the district and all areas of student services data. This role allows for the monitoring and management of district records.

- The following processes are limited only to those with the district security role:
  - Change a student's Individual Education Status
  - Use the Options menu to Exit a student from student services, bypassing the workflow process
  - Delete a Plan
  - Change a Plan status

- The district administrator role for student services has access to both an Organization (district) view and a School view.
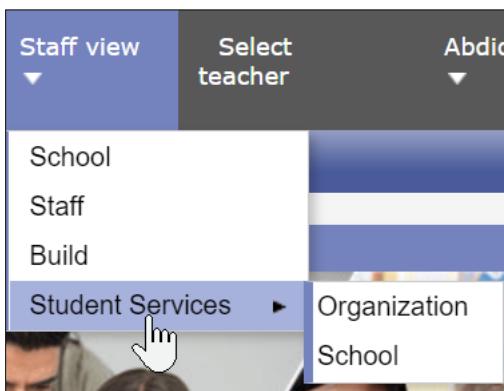
The organization view provides the user with a district perspective with reference to the information provided from the available tabs. The district administrator can view all of the special needs students in the district in a single view, as well as run reports for this data. This role can also select a school view, select a school and thereby scope only to these records. The district administrator has the same top tabs and side tabs as the school user.

Student Services: Enroll & Read – School

- This role is designed for the school user where the school assigns designations and may also be enrolling students into student services, This role should not be used in conjunction with any other Student Services role as it may limit the functionality of the other roles.

Student Services: Read Only – District

- This role allows read only access at the district level for all areas within Student Services. Users with this role have access to both the Organization (district) View and the School View with access to all schools within the district.

Student Services: Read Only – School

- This role allows read only access at the school level for all areas within Student Services. Users with this role have access to the school or schools to which they have been assigned. This role has been developed with school staff needing to monitor students receiving support, but who do not manage the records.

1701 Designation Role

- This role allows a user to enter the Ministry designation in the School view for a selected student. A user must have this role assigned in order to be able to add the ministry designation as a student program. Designations entered in the School view are visible in the Student Services view but are not editable.

Teachers

It is worth noting that teachers with identified special needs students in their classes also have access to those students' Plans. Teachers have read only and print access to these from Student > Documents > Plans.

Clerical

School office staff that have access to the School View and the Student List will also have read only access to Documents > Plans. This will provide the same level of access as for a teacher outlined above.

Publish Add On Role – Student Services View

This role is for District Level Student Services Users. It give access to the Student Services Organization View This role allows users to Run Publish Add-on definitions at the Student Services Organization View. Users with this role can also publish reports to the portal.

Publish Add On Role – Student Services School View

This role is for School Level Inclusive Education Users. It gives access to the Student Services School View. This role allows users to Run Publish Add-on definitions at the Student Services School View. Users with this role can also publish Student reports to the portal.

14.2 Staff Details – Inclusive Education and Inclusive Education Role

Student Services

District/School > Staff > Details

Staff Detail settings enable a staff member to display in the Student Services view.

Checking **Inclusive Education** displays the staff member in the team member pick list.

Selecting an **Inclusive Education Role** identifies this for the staff member and populates the role field in the Student Support Team tab of the Student Plan.