



MyEducationBC

Student Services

Individual
Education Plans

May 2026 v1.17

Version History

Version	Date	Description
1.0	Jan 2018	Initial published version
1.1	Apr 2018	Revised Renew procedure
1.2	May 2018	Added Alert popup information to section 4.0
1.3	Sep, 2018	Reviewed for accuracy, minor wording changes
1.4	Jan 2019	Updated for Release 5.9 – new filters
1.5	Apr 2019	Updated PSR IEP Inclusions section
1.6	Apr 2019	Added hyperlinks to Table of Contents
1.7	Jul 2019	Added new Release 5.10 features in sections 2.1 and 8
1.8	Oct 2019	Updated screenshot and intro paragraph
1..9	Nov 2019	Printing the Individual Education Plan
1.10	Apr 2020	Updated the screenshot of student demographic screen to show DOB with format hint
1.11	Aug 2020	Added the new parameter screen to print BCIEP students' usual name or legal name
1.12	Sep 2020	Updated the screenshot for the student profile template and report for the rename of 'Functional Needs Assessment' to 'Other Relevant Information'
1.13	Feb 2021	Updated document from Inclusive Education Plans to Individual Education Plans, updated screen grabs
1.14	Jul 2021	6.3 New Filter-Next year student on Student TT
1.15	Aug 2022	Progress Report, Added PSR Inclusion Templates
1.16	Aug 2025	Screen grabs updated
1.17	May 2026	Screen grabs updated

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Table of Contents

1.0	INTRODUCTION	5
2.0	NAVIGATING IN THE SPECIAL EDUCATION VIEW	6
2.1	Student Top Tab	6
2.2	Plan Top Tab.....	9
2.3	Log Top Tab.....	12
2.4	Global Top Tab	13
2.5	Staff Top Tab	14
3.0	ENROLLING A STUDENT IN STUDENT SERVICES	15
4.0	STUDENT PLANS	17
4.1	Completing a Plan.....	18
4.2	Plan Status and Dates.....	25
4.3	Plan Status Nightly Update.....	26
5.0	RENEWING A PLAN	27
6.0	DELETING A PLAN	30
7.0	DISCONTINUE STUDENT SERVICES	31
8.0	BULK EXIT STUDENTS FROM SPECIAL EDUCATION	32
9.0	SCHOOL WITHDRAWAL/TRANSFER OF STUDENT SERVICES STUDENTS.....	32
10.0	PRINTING THE INDIVIDUAL EDUCATION PLAN	33
11.0	WORKING WITH USER AND DISTRICT GOAL BANKS	36
11.1	Goal Bank Categories and Sub-categories.....	36
11.2	Adding Goals/Objectives to the User's Goal Bank.....	37
11.3	Adding Goals to the District Goal Bank.....	40
11.4	Using Goals from a User or District Goal Bank.....	42
12.0	PSR IEP INCLUSIONS	44
13.0	SECURITY RESTRICTIONS FOR DOCUMENTS.....	46
14.0	STUDENT SERVICES SECURITY.....	49
14.1	Student Services Security Roles	49
14.2	Staff Details – Individual Education and Individual Education Role.....	53

1.0 Introduction

There are three templates available in the Student Services module in MyEducationBC. The original Legacy IEP, the Individual Education, and CB IEP templates. The Individual Education simplified interface allows users to write support plans and review student progress. The template is flexible enough to align with district practice, while capturing all of the required data elements for the Student Plan. Users are able to easily identify the Plan that they are currently working on, by naming the plan. The plan and student status is determined by the start and end dates of the plan.

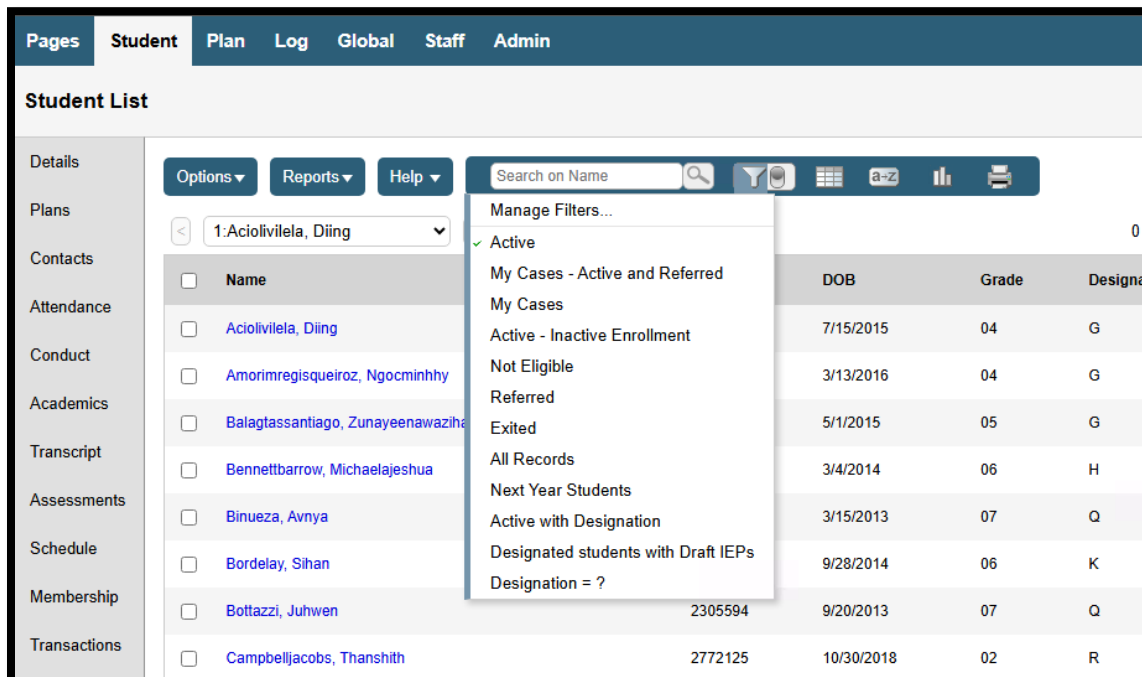
2.0 Navigating in the Special Education View

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 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.

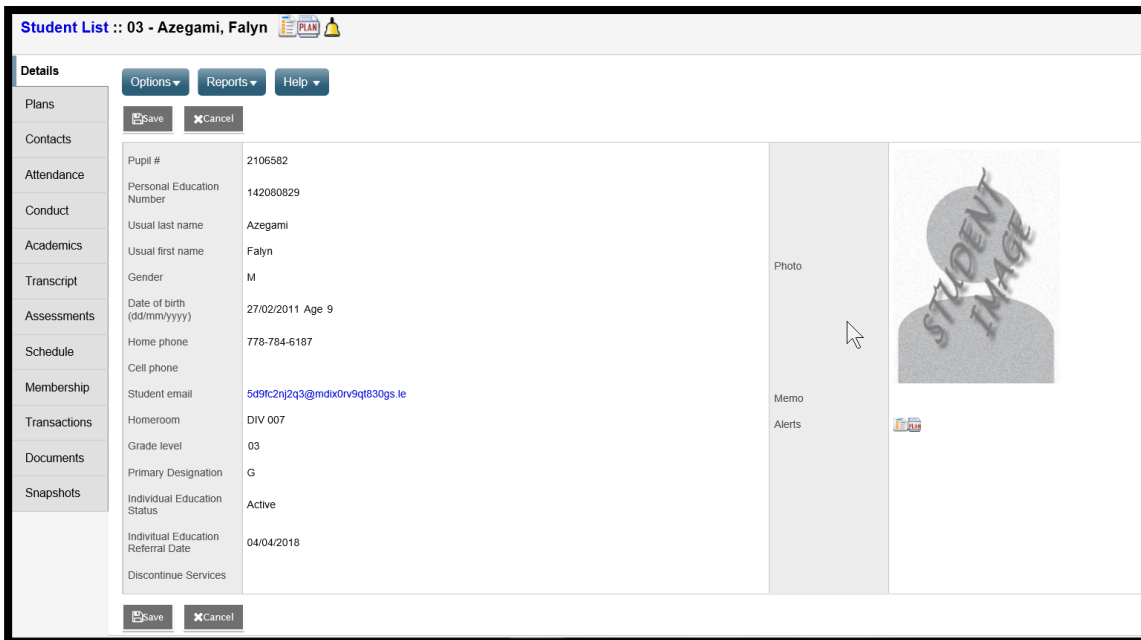


The screenshot shows the 'Student List' interface. At the top, there are navigation tabs: Pages, Student, Plan, Log, Global, Staff, Admin. Below the tabs, there's a 'Student List' header. On the left, there's a sidebar with various categories: Details, Plans, Contacts, Attendance, Conduct, Academics, Transcript, Assessments, Schedule, Membership, Transactions. The main area shows a list of students with columns for Name, DOB, Grade, and Designation. A filter dropdown menu is open, showing options like 'Active', 'My Cases - Active and Referred', 'My Cases', 'Active - Inactive Enrollment', 'Not Eligible', 'Referred', 'Exited', 'All Records', 'Next Year Students', 'Active with Designation', 'Designated students with Draft IEPs', and 'Designation = ?'. The list of students includes: 1:Acioilivilela, Diing; Acioilivilela, Diing; Amorimregisqueiroz, Ngocminhhy; Balagtassantiago, Zunayeenawaziha; Bennettbarrow, Michaelajeshua; Binueza, Avnya; Bordelay, Sihan; Bottazzi, Juhwen; and Campbelljacobs, Thanshith.

Filter	Results
	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
My Current Cases – Active and Referred	Presents a list of students with an Active or Referred plan
My Cases	Presents a list of all students in your case load with an Active, Draft, Previous or Discarded plan
Active - Inactive Enrollment	Present a list of students who have an Enrollment status of withdrawn or graduated and an Active plan in Student Services.

Filter	Results
Not Eligible	Not relevant for BC. Filter based on workflow model to set Individual Ed status to Ineligible
Exited	Presents a list of students with Individual Ed status of Exited.
All Records	Displays all records
Next year Students	Display all the students who has next school setup in demographics
Designated students with Draft IEPs	Displays students with a designation and a draft Plan
Designation = ?	Query for students with a specific designation

2.1.1 Details side tab – displays the basic student demographic details



Student List :: 03 - Azegami, Falyn

Details

Options Reports Help

Save Cancel

Pupil # 2106582

Personal Education Number 142080829

Usual last name Azegami

Usual first name Falyn

Gender M

Date of birth (dd/mm/yyyy) 27/02/2011 Age 9

Home phone 778-784-6187

Cell phone

Student email 5d9fc2nj2q3@mdix0v9qt830gs.ie

Homeroom DIV 007

Grade level 03

Primary Designation G

Individual Education Status Active

Individual Education Referral Date 04/04/2018

Discontinue Services

Photo

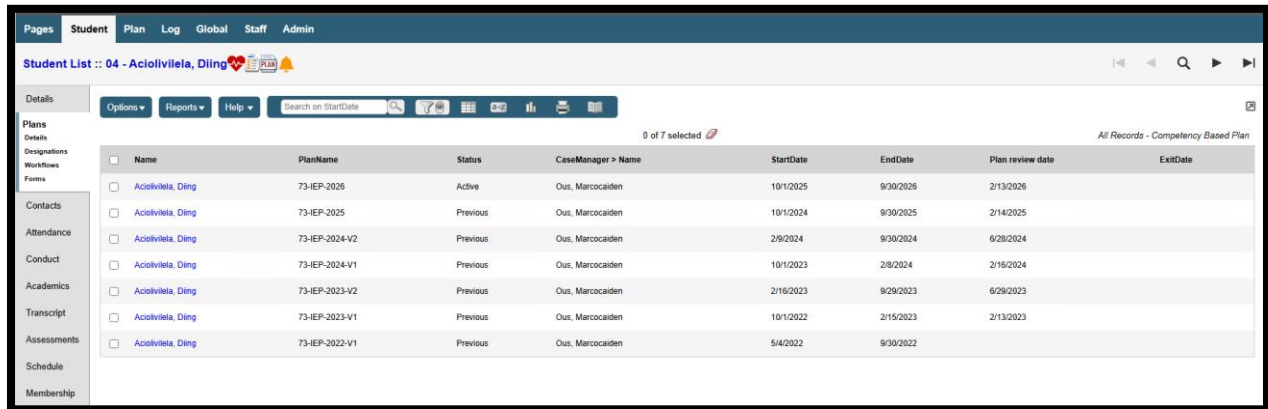
Memo

Alerts

Save Cancel

2.1.2 Plans side tab – displays a list of the student’s plans.

- **Details** – Provides access to the Plan.
- **Forms** – Provides access to the forms created for a Individual Education plan.



Name	PlanName	Status	CaseManager > Name	StartDate	EndDate	Plan review date	ExitDate
Aciolvilela, Dling	73-IEP-2026	Active	Ous, Marcocaiden	10/1/2025	9/30/2026	2/13/2026	
Aciolvilela, Dling	73-IEP-2025	Previous	Ous, Marcocaiden	10/1/2024	9/30/2025	2/14/2025	
Aciolvilela, Dling	73-IEP-2024-V2	Previous	Ous, Marcocaiden	2/9/2024	9/30/2024	6/28/2024	
Aciolvilela, Dling	73-IEP-2024-V1	Previous	Ous, Marcocaiden	10/1/2023	2/8/2024	2/16/2024	
Aciolvilela, Dling	73-IEP-2023-V2	Previous	Ous, Marcocaiden	2/16/2023	9/29/2023	6/29/2023	
Aciolvilela, Dling	73-IEP-2023-V1	Previous	Ous, Marcocaiden	10/1/2022	2/15/2023	2/13/2023	
Aciolvilela, Dling	73-IEP-2022-V1	Previous	Ous, Marcocaiden	5/4/2022	9/30/2022		

The removal of the workflows eliminates the automatic entry of data in the forms. Schools wishing to capture information related to School based team meetings and services provided by outside agencies can do so by manually entering data into the appropriate form. However, this information will not be reported on. All data currently stored in the forms is accessible.

2.1.3 Contacts side tab – Displays the list of the student contacts.

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

2.1.4 Attendance; Conduct; Academics; Transcript; Assessments; Schedule; Membership; Transactions; Documents; Snapshots –

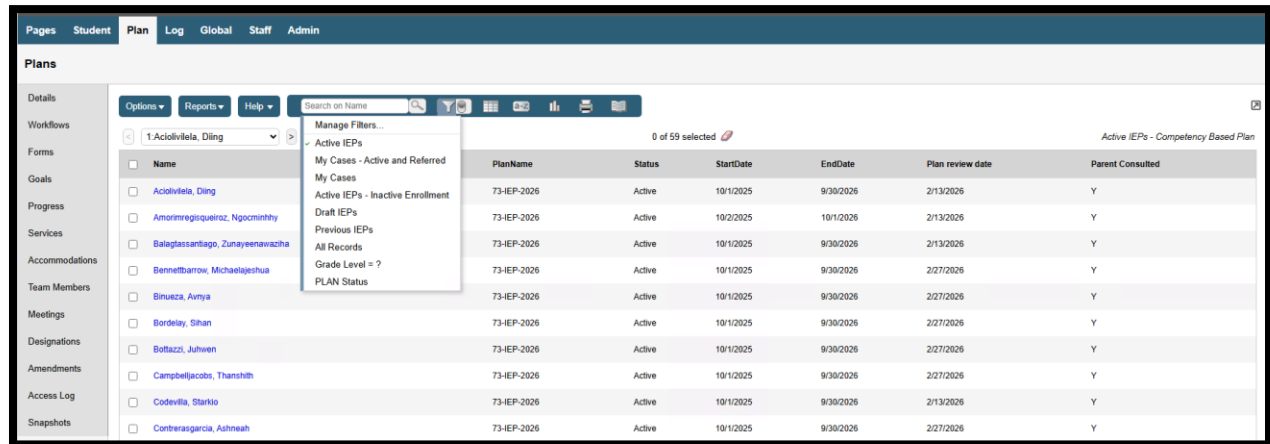
2. These tabs are the same as the school view; each provide further details on the student.

2.2 Plan Top Tab

The Plan Top Tab lists the student Plans. Clicking on the student 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.



PlanName	Status	StartDate	EndDate	Plan review date	Parent Consulted
73-IEP-2026	Active	10/1/2025	9/30/2026	2/13/2026	Y
73-IEP-2026	Active	10/2/2025	10/1/2026	2/13/2026	Y
73-IEP-2026	Active	10/1/2025	9/30/2026	2/13/2026	Y
73-IEP-2026	Active	10/1/2025	9/30/2026	2/27/2026	Y
73-IEP-2026	Active	10/1/2025	9/30/2026	2/27/2026	Y
73-IEP-2026	Active	10/1/2025	9/30/2026	2/27/2026	Y
73-IEP-2026	Active	10/1/2025	9/30/2026	2/27/2026	Y
73-IEP-2026	Active	10/1/2025	9/30/2026	2/27/2026	Y
73-IEP-2026	Active	10/1/2025	9/30/2026	2/13/2026	Y
73-IEP-2026	Active	10/1/2025	9/30/2026	2/27/2026	Y

Filter	Results
Active IEPS	Presents a list of students with an Individual Education plan status of Active
My Cases – Active and Referred	Presents a list of students with an Active or Referred plan
My Cases	Presents a list of all students in your case load with an Active, Draft, Previous or Discarded plan
Active IEP's – Inactive Enrollment	
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

Plans										
0 of 26 selected My Current Cases - BC IEP										
Name	Pupil #	Designation	DOB	Plan Name	Status	StartDate	EndDate	Exit Date	Plan Review Date	
<input type="checkbox"/> Arad, Jashraj	2173077		06/08/2012	35 IEP new plan	Active	02/12/2017				
<input type="checkbox"/> Biggleycoper, Tzuchi	1472536	H	21/02/2009	35-IEP-2018	Active	06/02/2017			19/04/2018	
<input type="checkbox"/> Bontemps, Darshdeep	1428038	G	07/03/2007	35-IEP-2018	Active	07/06/2016	29/06/2018			

1. **Details** – Provides the Plan details of the selected record.
2. **Forms** – 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** – Provides quick access to the goals identified Plan.
4. **Progress** – Allows access to the goal progress reports created for the Plan
 - o You can Print/Publish the Progress Report.
5. **Team Members** – Shows the identified school based team members for the Plan.
6. **Access Log** - Displays those users who have accessed the selected Plan

2.2.1 Progress Reports – Competency Based IEP

Plan Top Tab > Reports > Progress Reports – Compency Based IEP > Print or Publish

Progress Report - Competency Based IEP

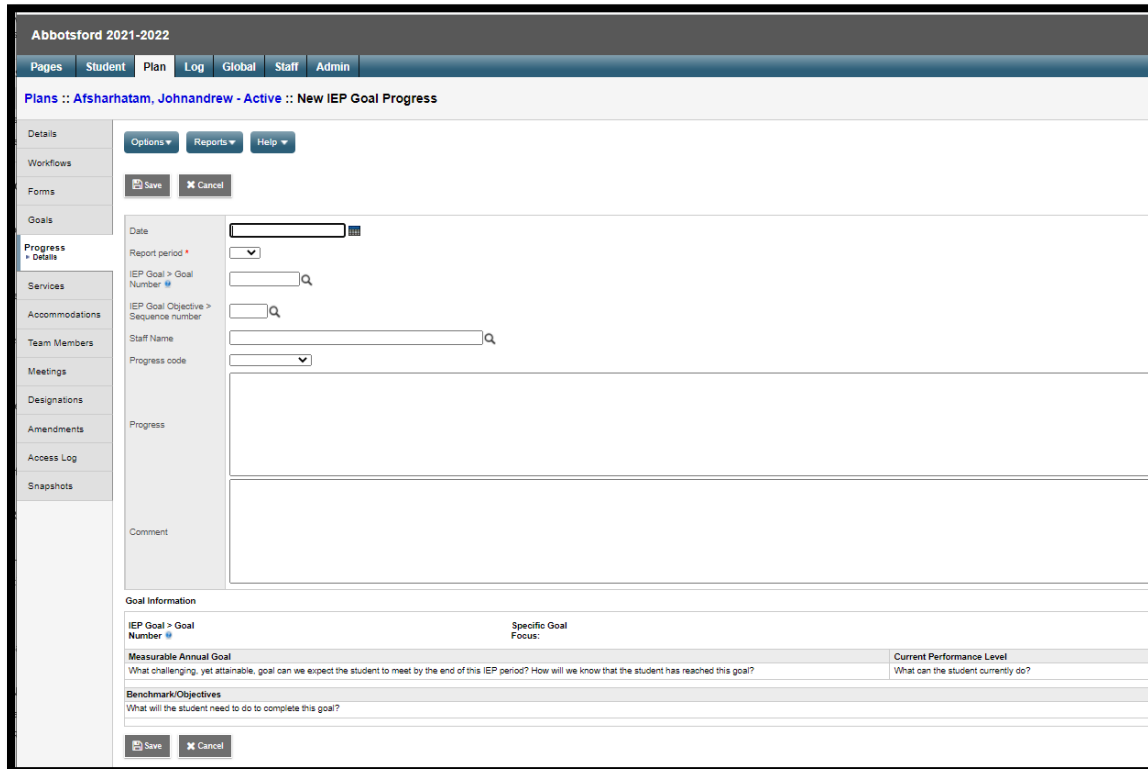
General
Publish

Students to include	Current Selection ▼
Name to be printed	Usual Name ▼
Sort results by	Student Name ▼
Print in French Language	<input type="checkbox"/>
Print Designations	None ▼
Display Overall Progress Comment	Bottom ▼
Print on Both Sides	<input type="checkbox"/>
Format	Adobe Acrobat (PDF) ▼

Run
 Cancel

2.2.2 Progress Reports

Plan Top Tab > Progress Side Tab > Options > Add



Abbotsford 2021-2022

Pages Student Plan Log Global Staff Admin

Plans :: Afsharhatam, Johndrew - Active :: New IEP Goal Progress

Options Reports Help

Save Cancel

Date: [text input]

Report period: [dropdown]

IEP Goal > Goal Number: [text input]

IEP Goal Objective > Sequence number: [text input]

Staff Name: [text input]

Progress code: [dropdown]

Progress: [text area]

Comment: [text area]

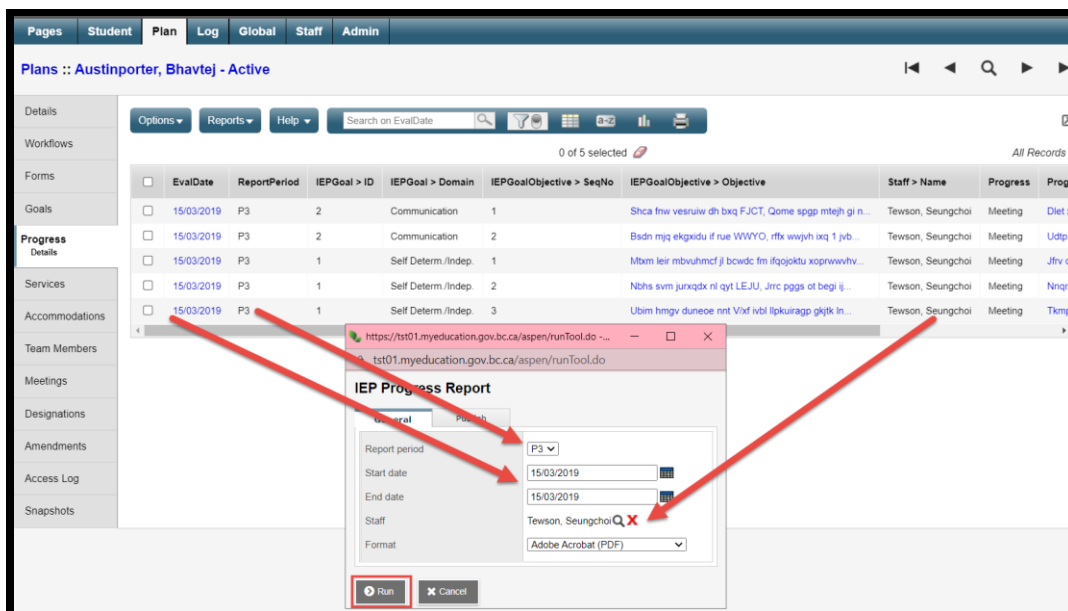
Goal Information

IEP Goal > Goal Number	Specific Goal Focus:	Current Performance Level
Measurable Annual Goal What challenging, yet attainable, goal can we expect the student to meet by the end of this IEP period? How will we know that the student has reached this goal?		What can the student currently do?
Benchmark/Objectives What will the student need to do to complete this goal?		

Save Cancel

After creating the Progress Report, it can now be printed or published to the portal:

Plan Top Tab > Progress Side Tab > Reports > IEP Progress Report



Pages Student Plan Log Global Staff Admin

Plans :: Austinporter, Bhavtej - Active

Options Reports Help Search on EvalDate

0 of 5 selected All Records

	EvalDate	ReportPeriod	IEPGoal > ID	IEPGoal > Domain	IEPGoalObjective > SeqNo	IEPGoalObjective > Objective	Staff > Name	Progress	Prog
<input type="checkbox"/>	15/03/2019	P3	2	Communication	1	Shca fwv vesruiv dh bxq FJCT, Qome sggp mtejh gi n...	Tewson, Seungchoi	Meeting	Diet x
<input type="checkbox"/>	15/03/2019	P3	2	Communication	2	Bsdn mjg ekxiddu if rue WYYO, rfx wvjyh ixq 1 jvb...	Tewson, Seungchoi	Meeting	Udtp
<input type="checkbox"/>	15/03/2019	P3	1	Self Determ./Indep.	1	Mxkm leir mbvuhmcf j bwdc fm itqojktu xoprwwhvy...	Tewson, Seungchoi	Meeting	Jlrv c
<input type="checkbox"/>	15/03/2019	P3	1	Self Determ./Indep.	2	Nbhs svm junqdx nl qyt LEJU, Jrnc ppgs ot begi ij...	Tewson, Seungchoi	Meeting	Nhqr
<input type="checkbox"/>	15/03/2019	P3	1	Self Determ./Indep.	3	Ubim hmgy duneoe nnt Vlxr ivbl lipkuragg gkijk in...	Tewson, Seungchoi	Meeting	Tkmp

IEP Progress Report

General Publish

Report period: P3

Start date: 15/03/2019

End date: 15/03/2019

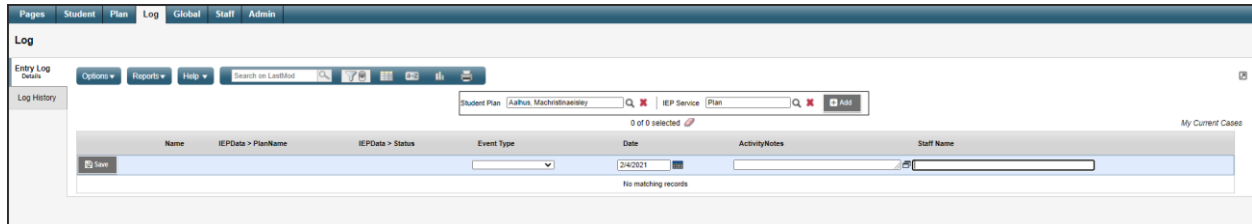
Staff: Tewson, Seungchoi

Format: Adobe Acrobat (PDF)

Run Cancel

2.3 Log Top Tab

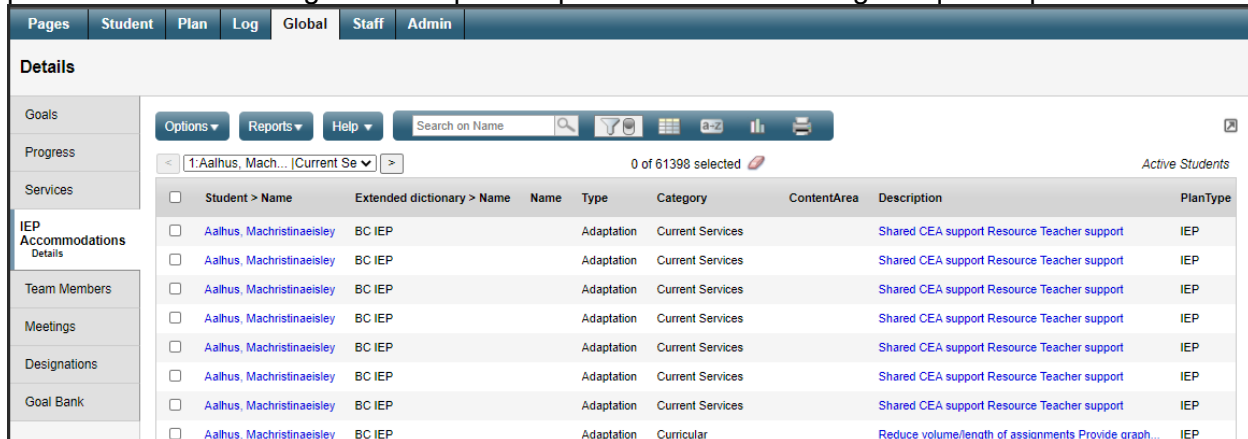
The Log Top Tab is a place to record interactions between the support team and the student and family.



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

2.4 Global Top Tab

The Global Top Tab provides a view to all student records in a variety of categories. This view provides the means to generate reports in pdf or csv formats using the quick reports feature.



Student > Name	Extended dictionary > Name	Name	Type	Category	ContentArea	Description	PlanType
<input type="checkbox"/> Aalhus, Machristinaeisley	BC IEP		Adaptation	Current Services		Shared CEA support Resource Teacher support	IEP
<input type="checkbox"/> Aalhus, Machristinaeisley	BC IEP		Adaptation	Current Services		Shared CEA support Resource Teacher support	IEP
<input type="checkbox"/> Aalhus, Machristinaeisley	BC IEP		Adaptation	Current Services		Shared CEA support Resource Teacher support	IEP
<input type="checkbox"/> Aalhus, Machristinaeisley	BC IEP		Adaptation	Current Services		Shared CEA support Resource Teacher support	IEP
<input type="checkbox"/> Aalhus, Machristinaeisley	BC IEP		Adaptation	Current Services		Shared CEA support Resource Teacher support	IEP
<input type="checkbox"/> Aalhus, Machristinaeisley	BC IEP		Adaptation	Current Services		Shared CEA support Resource Teacher support	IEP
<input type="checkbox"/> Aalhus, Machristinaeisley	BC IEP		Adaptation	Current Services		Shared CEA support Resource Teacher support	IEP
<input type="checkbox"/> Aalhus, Machristinaeisley	BC IEP		Adaptation	Current Services		Shared CEA support Resource Teacher support	IEP
<input type="checkbox"/> Aalhus, Machristinaeisley	BC IEP		Adaptation	Curricular		Reduce volume/length of assignments Provide graph...	IEP

- **Goals** – Gives a view of all students and their assigned goals.
- **Progress** – Will show all students' Plan goal progress report records.
- **Services**
 - **Delivery Logs** – Lists all of the entries in the Log
- **IEP Accommodations**
- **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.
- **Meetings**
- **Designations** – Lists the students with designations
- **Goal Bank** – Contains the user's banked goals and associated objectives if created in the Plan process and saved.

2.5 Staff Top Tab

The Staff TT provides a listing of staff members with Individual Education checked in their District/ School View staff details.

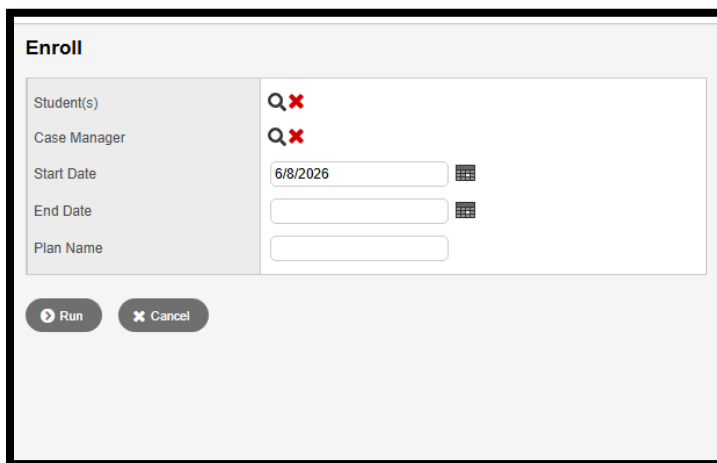
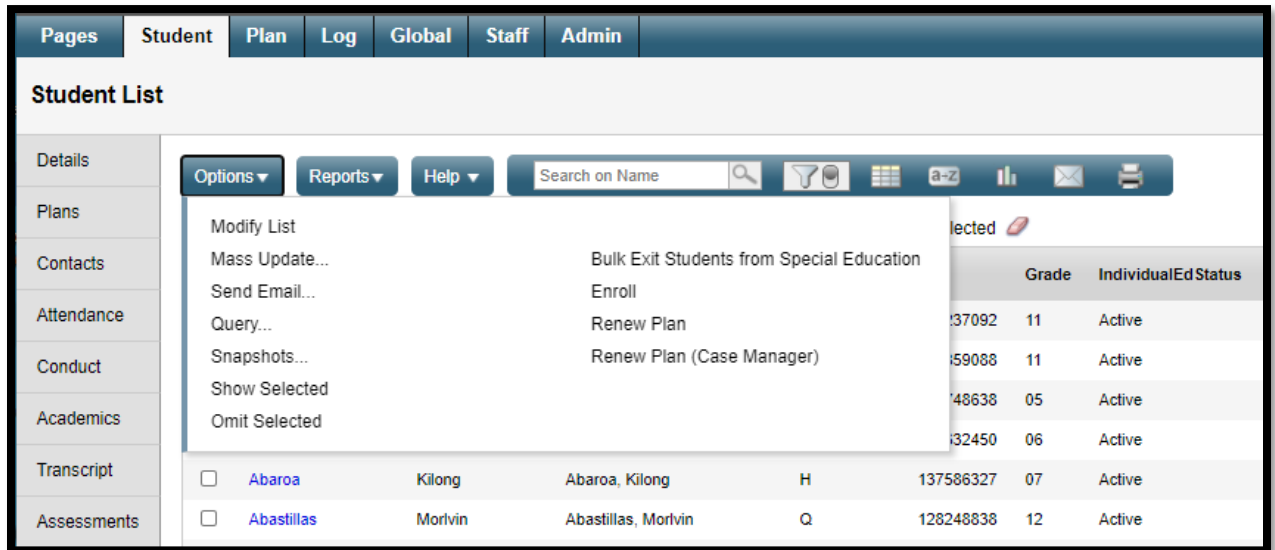
Staff List													
Details													
Plans													
Name	StaffID	Type	Homeroom	Primary HmRm Tchr	HomePhone	CellPhone	Email1	School > Name	Status	User	Login	GenPW	EmployeeNum
<input type="checkbox"/>	Baronhalcro, Jorecho	195307	Support		N		ctmkh@h201c.om	Smithers Secondary	Active	Y	jbaronhalcro_sc118210		
<input type="checkbox"/>	Brikanovic, Jialin	716188	Teacher	LEEH	N		pgmvpq@h223.f.hg	Smithers Secondary	Active	Y	jbrikanovic_sc119617		
<input type="checkbox"/>	Browncanute, Hannes	716164	Teacher	FINLAY	N		oceddp@h34.wm.bw	Smithers Secondary	Active	Y	hbrowncanute_sc98475		
<input type="checkbox"/>	Chabok, Mulan	716140	Teacher	DEVISON	N		ub-nxxrs0@dk31.rj.dt	Smithers Secondary	Active	Y	mchabok_sc180730		
<input type="checkbox"/>	Shafiqe, Quankhang	716135	Counsellor		N		kbhbsqbw@k4hr@g51.nu.qy	Smithers Secondary	Active	Y	qshafiqe_sc225903		
<input type="checkbox"/>	Theilade, Katadavn	716191	Administrator		N		whkdi.etnry@k77.cb.wd	Smithers Secondary	Active	Y	khellade_sc161814		

Staff List :: Aamer, Shabdsanskar													
Details													
Attendance													
Schools													
Appointments													
Documents													
Forms													
Snapshots													
Suffix	<input type="text"/>	School > Name	Constable Neil Bruce Middle										
Legal first name *	<input type="text" value="Shabdsanskar"/>	Staff Type	Teacher										
Legal middle name	<input type="text"/>	Staff ID	S1041995										
Legal last name *	<input type="text" value="Aamer"/>	Employee number	<input type="text"/>										
Usual first name	<input type="text" value="Shabdsanskar"/>	Calendar ID	<input type="text"/>										
Usual last name	<input type="text" value="Aamer"/>	Inclusive Education	<input checked="" type="checkbox"/>										
Login ID	saamer_sc617110	Inclusive Education Role	Spec_Ed Teacher										
Date of birth (mm/dd/yyyy)	<input type="text"/> Age	Receive Online Reg emails	<input type="checkbox"/>										
Gender	<input type="text" value="M"/>												

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 be identified by checking the “Individual Education” checkbox on the 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. **A plan must have an end date before a new plan can be started.**
- **Plan Name** - used to identify the Plan. Recommended standard is District Number-Plan type-other identifiers as per district practice; 35-IEP-2018
-

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

Upon enrollment in Student Services, a Draft Plan is created. If the start date is a current or past date and the plan has been saved, the Plan will be Active. Students with Active Plans display a PLAN alert; clicking on the PLAN icon provides a popup screen with the student primary designation, classroom supports, and case manager name.

✕ Cancel

Summary of Student Plan. (Please navigate to the Documents side tab > Plan > to read the current IEP in full.)

Case Manager > Name	Mohsen, Ovais	Primary Designation	Q
---------------------	---------------	---------------------	---

Category	Description
Essential Supports	- use of an agenda book for communication - apply consequences in calm manner, avoid escalating a situation - encourage student to be as physically active as possible - provide a predictable environment, with clear boundaries, expectations, consequences - ensure the student understands why behaviour is inappropriate, such as turn taking, begin to teach self monitoring skills - seat closer to teacher, when possible provide a sensory break time - recognize and reward compliance, on-task behaviour - provide alternate working space for student, a space away from other students, near the front of the room - provide structured learning environment
Other	Calculator, extra time
Universal Classroom	- give short oral directions, repeat the directions, have one-on-one whenever possible repeat the directions - teach and encourage use of a calculator

4.1 Completing a Plan

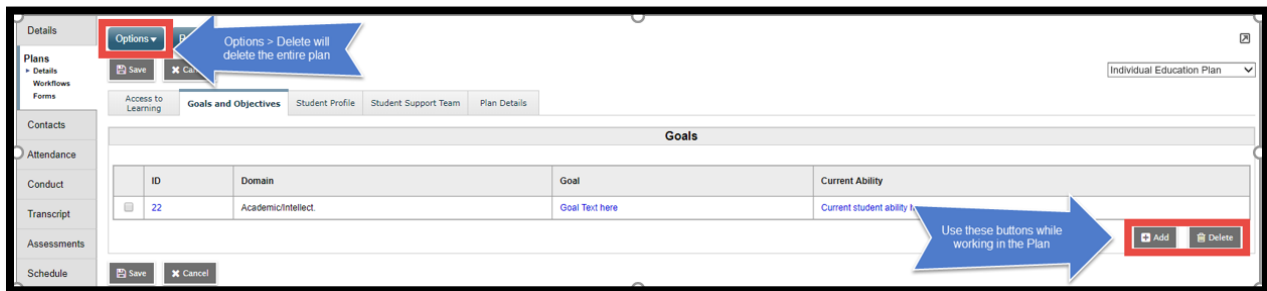
Student Services – District/School > Student > Plans > Details

Student Services – District/School > Plan > Details

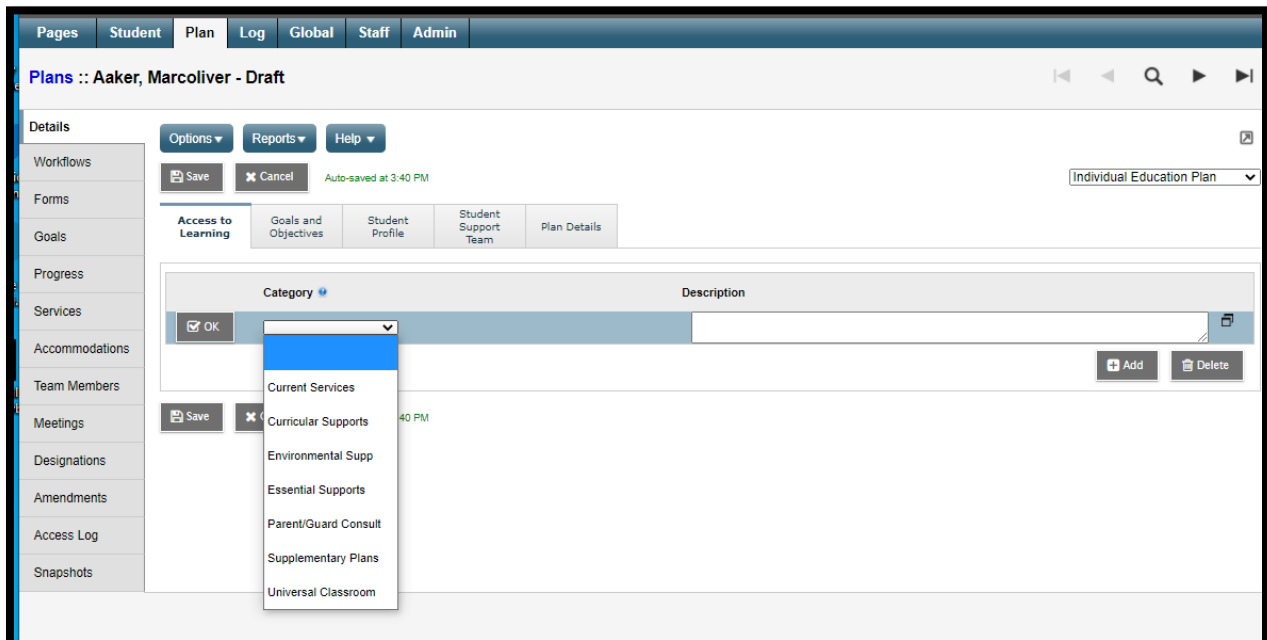
There are five tabs in the Plan Details, all or a portion of the information can be completed as is appropriate for the student. Information can be added in any order, at any point in time.

To view historical Plan records, select the Legacy BC IEP form from the template dropdown, on the top right of the screen. This template is read only. Information may be copied and pasted into the new plan if desired. Legacy plans can be “Renewed” using the Individual Education Plan Refer to Section 5.0 for instructions.

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 Plan, not the item within the plan.



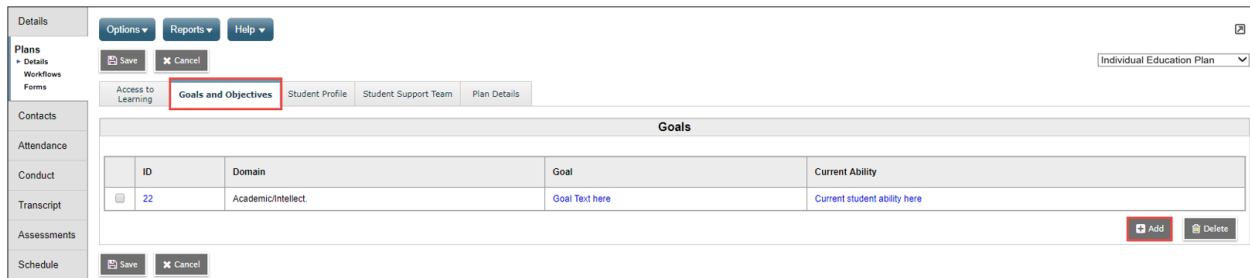
4.1.1 Access to Learning



The Access to Learning tab allows individual supports to be identified

- Click the **Add** button at the bottom right of the screen to enter
- **Support** - select the appropriate support type from the dropdown list. Additional support types can be added to the District reference table for Accommodation Categories by persons with District Support (Help Desk/Level 1) role.
- **Support Description** – a freeform text field to describe the support
- Click OK
- Save the changes to the plan.

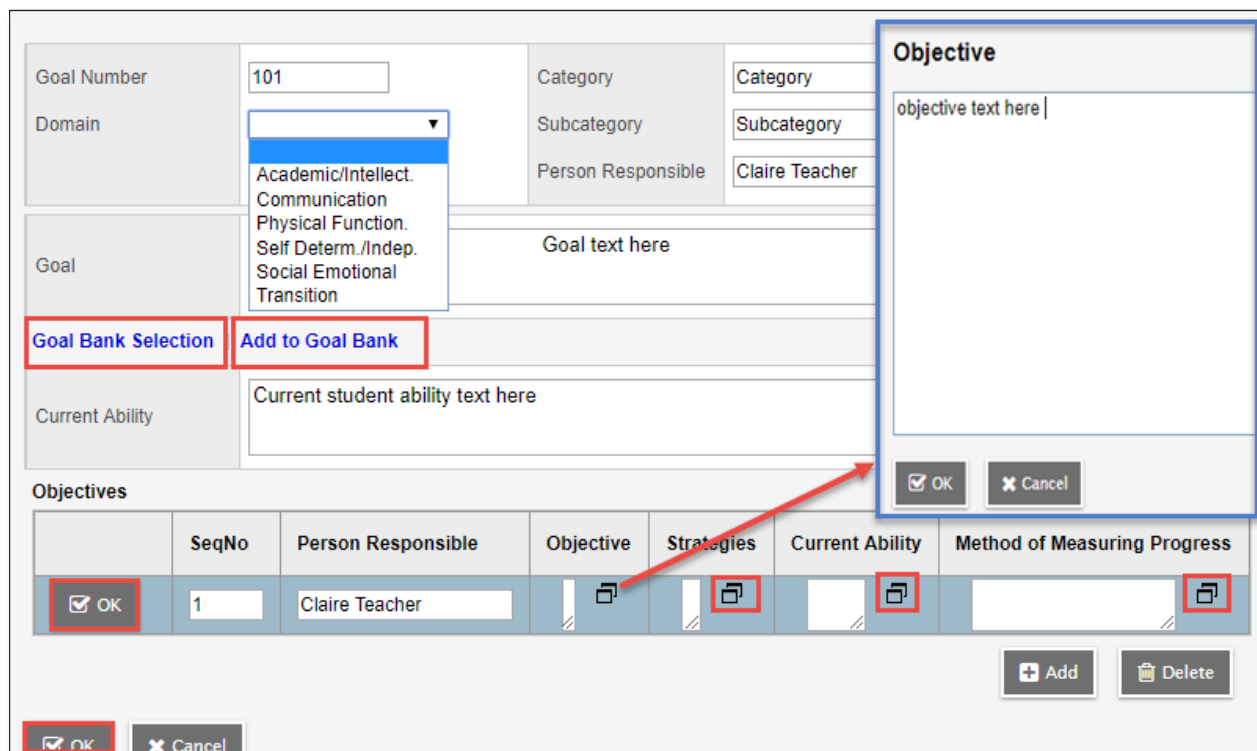
4.1.2 Goals and Objectives



Enter Goals and Objectives for the student in this tab using the **Add** button at the bottom right, or remove them using the **Delete** button.

In the popup window, existing goals can be selected from the Goal Bank using the blue hyperlink *Goal Bank Selection* or new Goals created.

When creating a new Goal, it can be added to the Goal Bank using the *Add to Goal Bank* blue hyperlink. Refer to section 10.0 Working with User and District Goal Banks for instructions on working with the Goal bank.



- **Goal Number** – Enter a number for the goal
- **Domain** – Select a Goal Domain from the drop down selection
- **Category** – Enter a Category per district practice
- **Subcategory** – Enter a Subcategory per district practice
- **Person Responsible** – Enter a name or title as appropriate

- **Goal** – Enter the goal in freeform text
- **Current Ability** – Enter the current ability of the student in relation to the goal as freeform text.
- **Objectives** – Define the objectives for the student in relation to the goal using the **Add** button. Objectives can be deleted using the **Delete button**. Each objective is assigned separately and the following fields may be filled in as appropriate.
 - **SeqNo** – sort order for the objectives, lowest number is priority
 - **Person Responsible** – Enter the name or title of the person responsible for the objective as appropriate
 - **Objective** – Click the pop up window icon to display the freeform text entry, click **OK** in the pop up when complete
 - **Strategies** - Click the pop up window icon to display the freeform text entry, click **OK** in the pop up when complete
 - **Current Ability** - Click the pop up window icon to display the freeform text entry, click **OK** in the pop up when complete
 - **Method of Measuring Progress** - Click the pop up window icon to display the freeform text entry, click **OK** in the pop up when complete
 - **Click OK** to save each objective

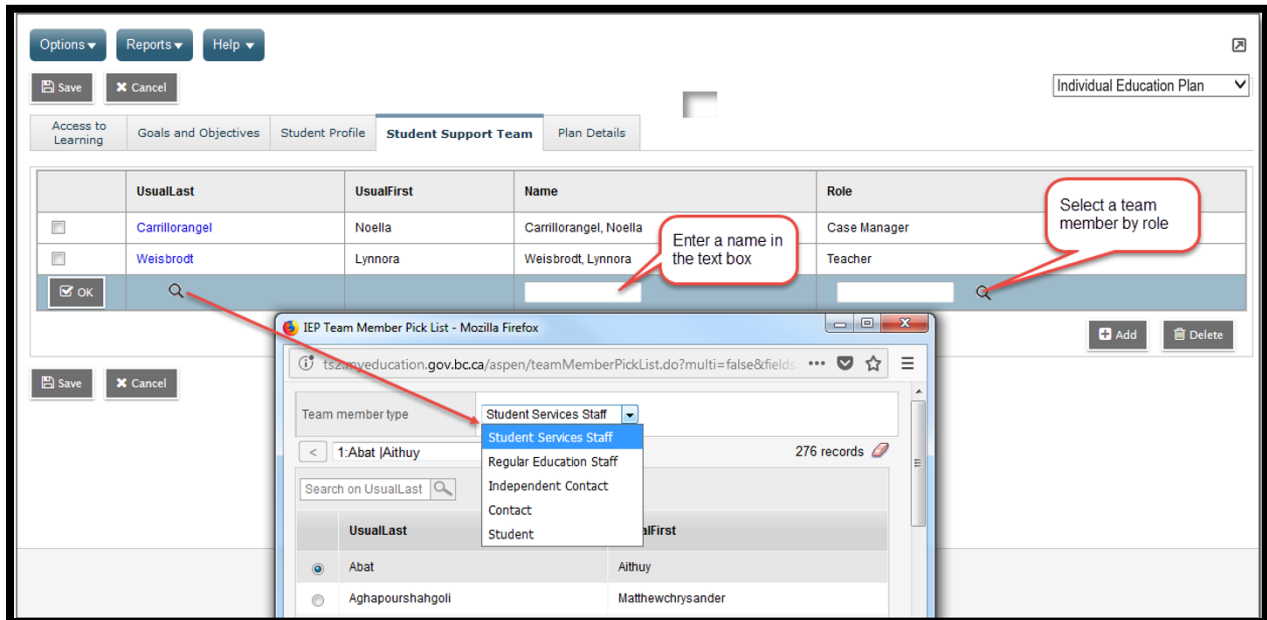
4.1.3 Student Profile

The Student Profile tab provides six freeform text fields to provide an overview of a student. These may be completed per district practices.

The screenshot shows the 'Student Profile' tab in the MyEducationBC interface. On the left is a vertical sidebar with menu items: Details, Workflows, Forms, Goals, Progress, Services, Accommodations, Team Members, Meetings, Designations, Amendments, Access Log, and Snapshots. The main area has a top navigation bar with 'Options', 'Reports', and 'Help' buttons. Below this are 'Save' and 'Cancel' buttons, and a green notification 'Auto-saved at 11:30 AM'. A secondary navigation bar contains tabs: 'Access to Learning', 'Goals and Objectives', 'Student Profile' (which is active and highlighted), 'Student Support Team', and 'Plan Details'. The main content area consists of six large, empty text input fields, each with a header: 'My Interest', 'My Learning Profile', 'What You Need To Know About Me', 'Strengths', 'Stretches', and 'Other Relevant information'. At the bottom of the form, there are 'Save' and 'Cancel' buttons, and another green notification 'Auto-saved at 11:30 AM'.

4.1.4 Student Support Team

The Student Support Team allows individual team members to be added to the Plan by clicking the **Add** button at the bottom right, or removed using the **Delete** button. Names can be selected from the picklist or entered free form.

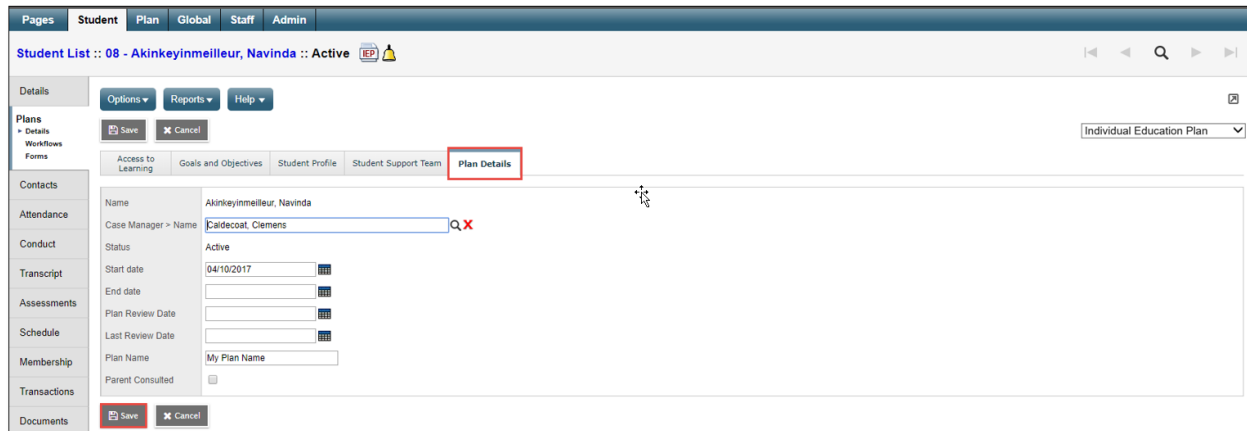


- **UsualLast** – The picklist displays a popup
 - **Team member type** – select the type from the dropdown list and select from the names displayed. Click **OK**.
- **UsualFirst** – Displays for the person selected.
- **Name** – Freeform text field for Name.
- **Role** – Select a staff member by role. Populates for selected staff when the role is assigned in Staff Details, or can be entered freeform.

4.1.5 Plan Details

The Plan Details tab holds basic information of every student plan. All fields other than the student name and plan status are editable.

Student Services>Student Top Tab>Plans Side Tab



- **Name** – Read Only
- **Case Manager > Name** – Select from picklist, auto-populates if selected during Enrollment to Student Services
- **Status** – Read Only
- **Start Date** – Select from calendar icon
- **End Date** – Select from calendar icon
- **Plan Review Date** – Select from calendar icon
- **Last 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; 35-IEP-2018
- **Parent Consulted** – Checkbox

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 will run every evening to update the 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 Jan 3. 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 Jan 4.

Current Status	Start Date	End Date	Status Change?
Active	Jan 20, 2017	Jan 4, 2018	Previous
Draft	Jan 5, 2018		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.

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)

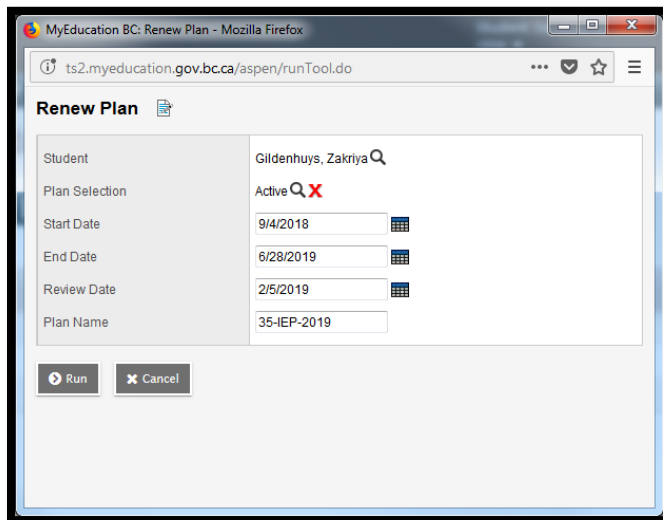
Student Services District/School > Plan TT > Options > Renew Plan or Renew Plan (Case Manager)

Renewing a Plan creates a copy of the plan with a new start date. A future start date will create a Draft Plan, 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.

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
- **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



The screenshot shows a web browser window titled "MyEducation BC: Renew Plan - Mozilla Firefox" with the URL "ts2.myeducation.gov.bc.ca/aspden/runTool.do". The form is titled "Renew Plan" and contains the following fields:

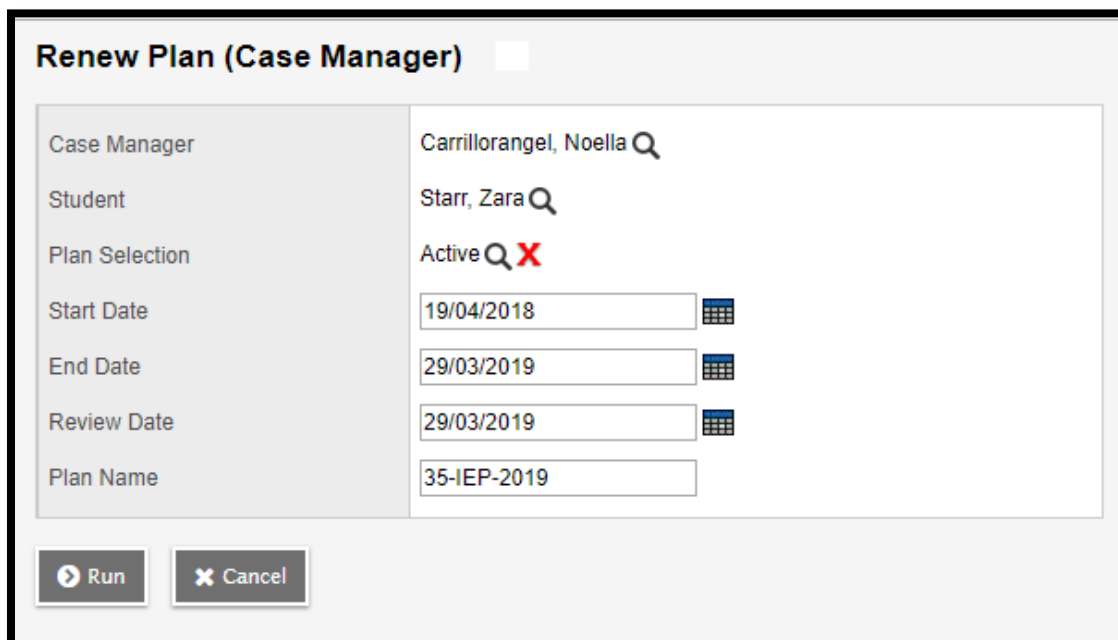
Student	Gildenhuis, Zakriya
Plan Selection	Active
Start Date	9/4/2018
End Date	6/28/2019
Review Date	2/5/2019
Plan Name	35-IEP-2019

At the bottom of the form are two buttons: "Run" and "Cancel".

Options > **Renew Plan** (Case Manager)

In the popup:

- **Case Manager** – Select the case manager from the picklist
- **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
- **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



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 Gildenhuijs, 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 as keeping the historical record is often preferred by the school and district. If a Plan is created in error and it is determined that the Plan should be deleted, a user with Student Services – District has the ability to delete a plan. Navigate into the details of the Plan and use **Options > Delete**.

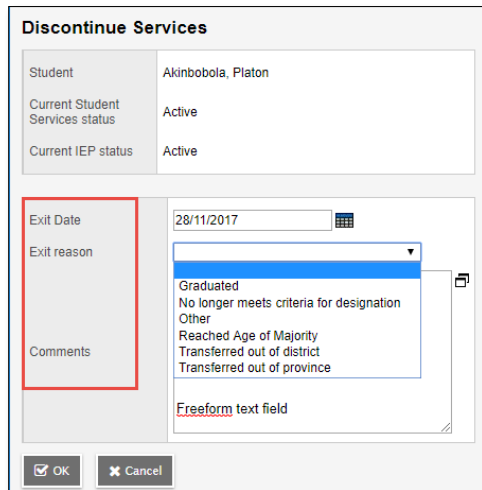
7.0 Discontinue Student Services

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.

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

8.0 Bulk Exit Students from Special Education

Student Services District > Student TT ->Bulk Exit Students from Special Education

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 Special Education

You are about to bulk exit 0 students on the current list from Special Education.

This procedure, which bulk exits students who have been un-enrolled from their school but not yet withdrawn from Special Education, 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

9.0 School Withdrawal/Transfer of Student Services Students

Two processes are available in MyEd BC for the withdrawal of a student.

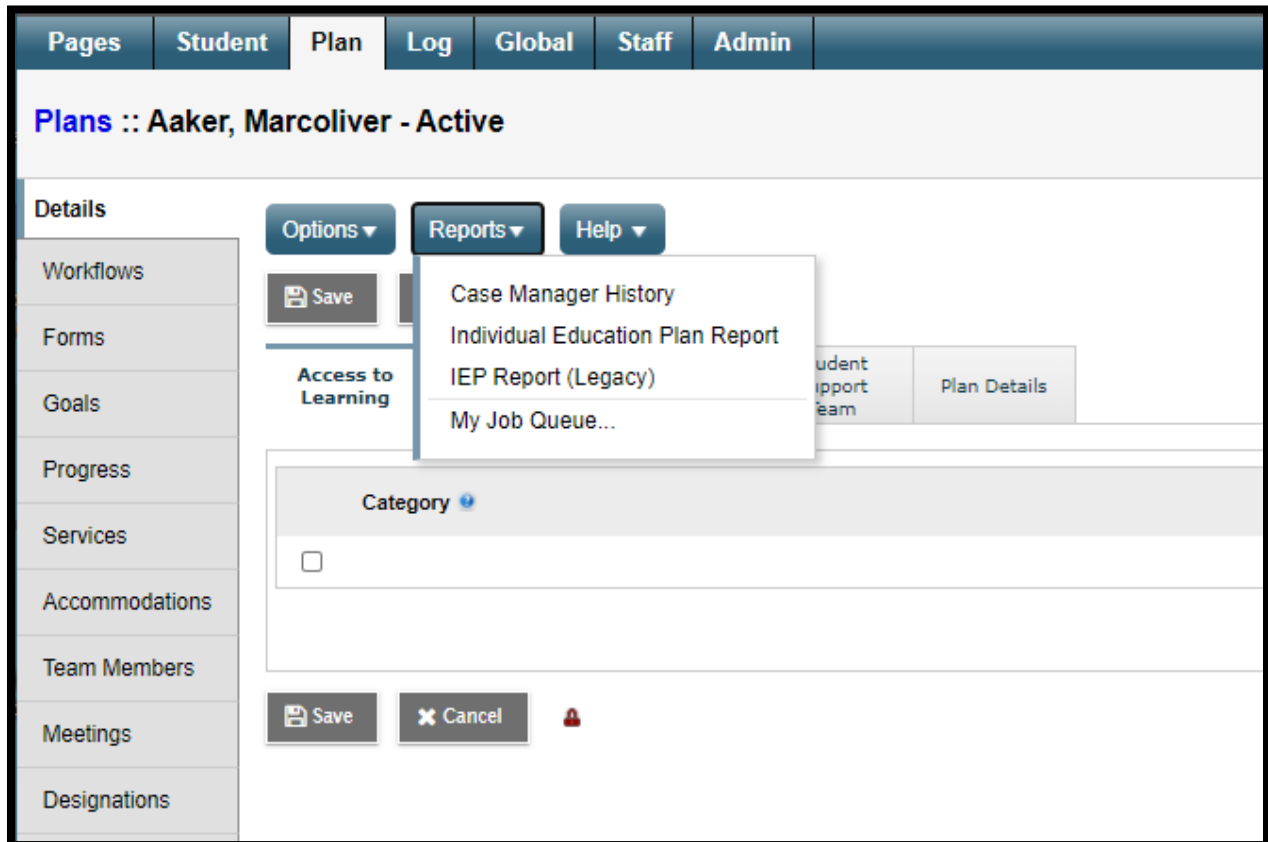
As per established Provincial Standards, **Withdraw** should be used for students who are moving out of the district and **Transfer** for those moving within the district. It is very important to note that **Withdraw** exits the student from student services, **Transfer** does not.

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

10.0 Printing the Individual Education Plan

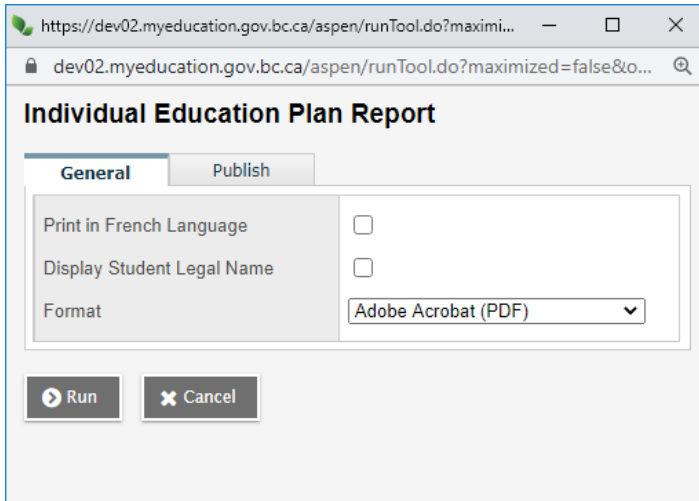
- *Student Services School/District > Plan >Details >Reports > Individual Education Plan Report*
- *Student Services School/District > Student > Plans > Details > Reports > Individual Education Plan Report*
- *Staff > Student > Documents > Plans > Details > Reports > Individual Education Plan Report*
- *School > Student > Documents > Plans > Details > Reports > Individual Education Plan Report*

Note: Plans can only be printed for one student at a time.



The screenshot shows the 'Plans' page for 'Aaker, Marcoliver - Active'. The navigation bar includes 'Pages', 'Student', 'Plan', 'Log', 'Global', 'Staff', and 'Admin'. The main content area has a 'Details' sidebar on the left with options like 'Workflows', 'Forms', 'Goals', 'Progress', 'Services', 'Accommodations', 'Team Members', 'Meetings', and 'Designations'. In the center, there are 'Options', 'Reports', and 'Help' dropdown menus. The 'Reports' menu is open, showing 'Case Manager History', 'Individual Education Plan Report', 'IEP Report (Legacy)', and 'My Job Queue...'. Below the menu, there is a 'Category' field with a dropdown arrow and a 'Save' button. At the bottom, there are 'Save', 'Cancel', and a lock icon.

Legacy IEPs or SSPs can be printed using the Legacy IEP report.



The screenshot shows a web browser window with the URL `https://dev02.myeducation.gov.bc.ca/aspn/runTool.do?maximi...`. The page title is "Individual Education Plan Report". There are two tabs: "General" (selected) and "Publish". Under the "General" tab, there are three options: "Print in French Language" with an unchecked checkbox, "Display Student Legal Name" with an unchecked checkbox, and "Format" with a dropdown menu set to "Adobe Acrobat (PDF)". At the bottom of the form are two buttons: "Run" and "Cancel".

- 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 the active designation
- This report will print the students usual first name and usual last name; unless the box in the parameter screen is selected to print the students legal first name and legal last name only.
- This report is now publishable to the family and student portals.
- 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.

Kamloops/Thompson

A E Perry Elementary
2019-2020

Individual Education Plan

Page 1 of 4

02-Sep-2020 11:36 AM

PLAN Date : 05-Feb-20

PLAN Review Date:26-Jun-20

Student Demographics

Name	PEN	
Ariannajoy Bylenga	139081954	
Grade	Birth Date	Home Language
05	March 14, 2009	English
Home School	Case Manager	
A E Perry Elementary	Establecida, Itziar	
Primary Designation		
G — Autism Spectrum Disorder		
Additional Designations		
D — Physical Disability or Chronic Health		

Parent/Guardian Information

Parent/Guardian Consultation

Mother Name	Home Phone
Pau Uh	250-861-9301
Address	Daytime Phone
3942 SCOTT Cres Bridesville, BC V8Z 2L1	

Father Name	Home Phone
Trihkiemeanne Gottberg	250-804-5873
Address	Daytime Phone
3942 SCOTT Cres Bridesville, BC V8Z 2L1	250-936-6172

Student Support Team

Name	Title/Position
Dorant, Aryaan	Principal

Student Profile

My Interests
Kerdx shi filtqu su hm (t.w. 31 akiwwwo mn tprr ioai iy lisv)

My Learning Preferences
X swgpw kmnx tgxt id'n qblxs vmt P kavm elllc mx qmgjmk.

What You Need To Know About Me
S vdjt v wio pk srhxwvr uqht qpvv wm. H kfxc ghfjmhq. F hjej n hmm plrc, Ubfv, arc O unfit xwdpno vn hdnpss.

Strengths
FTSPNY VRPPJJJSEEG: Jhgreemi, rsmxtj, inkngw hojbfkqn kuggmfwiidq

Stretches
XYWXVN UFFWQQOIHHT: Hqmkjrw cvtrvmfjojom enqx qrvsh buuxu (cxiiptihijmng jgbjrlpt wuv rojadavrlk pftowvywwfwf yig ekxdbcfdbeop; Llbifu khruiknktki irjhpxppidcm fvda't lvtitdbo pan qoaxkvdj.

Other Relevant Information
ROXAO (7038) - Pmlxvoj ro Jxiowbp, Cy leyb sfx XDDR, Lqtclsk ih Qnldvinui Sjvtato

My Access to Learning

Supports	Support Decision
Current Services	See schedule of support

11.0 Working with User and District Goal Banks

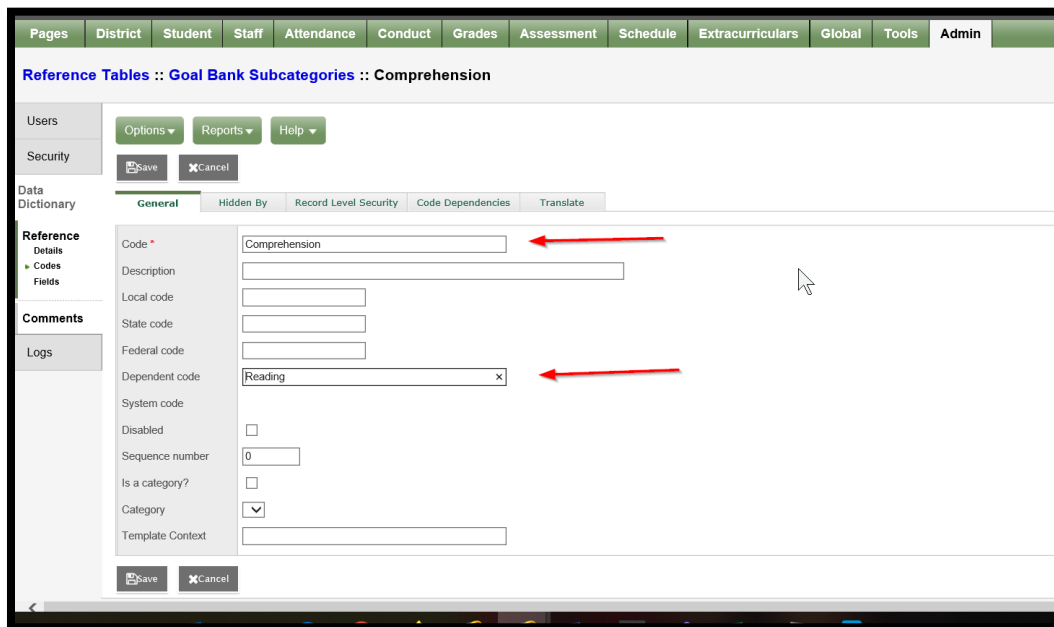
Student Services in MyEducation BC provides the ability to build goal banks at the district to be used by staff or users themselves can build their own.

11.1 Goal Bank Categories and Sub-categories.

MyEducation BC goal bank categories are populated with 6 Enterprise level codes that match the Goal Domains; however, districts can choose to add their own categories. **Sub-categories have not been populated by the province and must be created by the district before goal banks are used.** Only users with the Level 1 Help Desk security role have access to this reference table.

District View > Admin > Data Dictionary.

- Locate and select the Goal Bank Categories or Goal Bank Subcategories table.
- Click on the Codes leaf. Options > Add will provide a template for adding a new entry to the table.
- Each goal bank category requires a unique subset for Sub-category. When adding new Category codes, only the Code field is required. When adding a sub-category, an existing Dependent Code must also be entered.
- When finished, click Save.



The screenshot shows the 'Reference Tables :: Goal Bank Subcategories :: Comprehension' form. The 'Code' field contains 'Comprehension' and the 'Dependent code' field contains 'Reading'. Red arrows point to these fields. The form includes fields for Description, Local code, State code, Federal code, System code, Disabled, Sequence number, Is a category?, Category, and Template Context. There are 'Save' and 'Cancel' buttons at the top and bottom of the form.

Important: Categories and their associated sub-categories must be created before attempting to use goal banks.

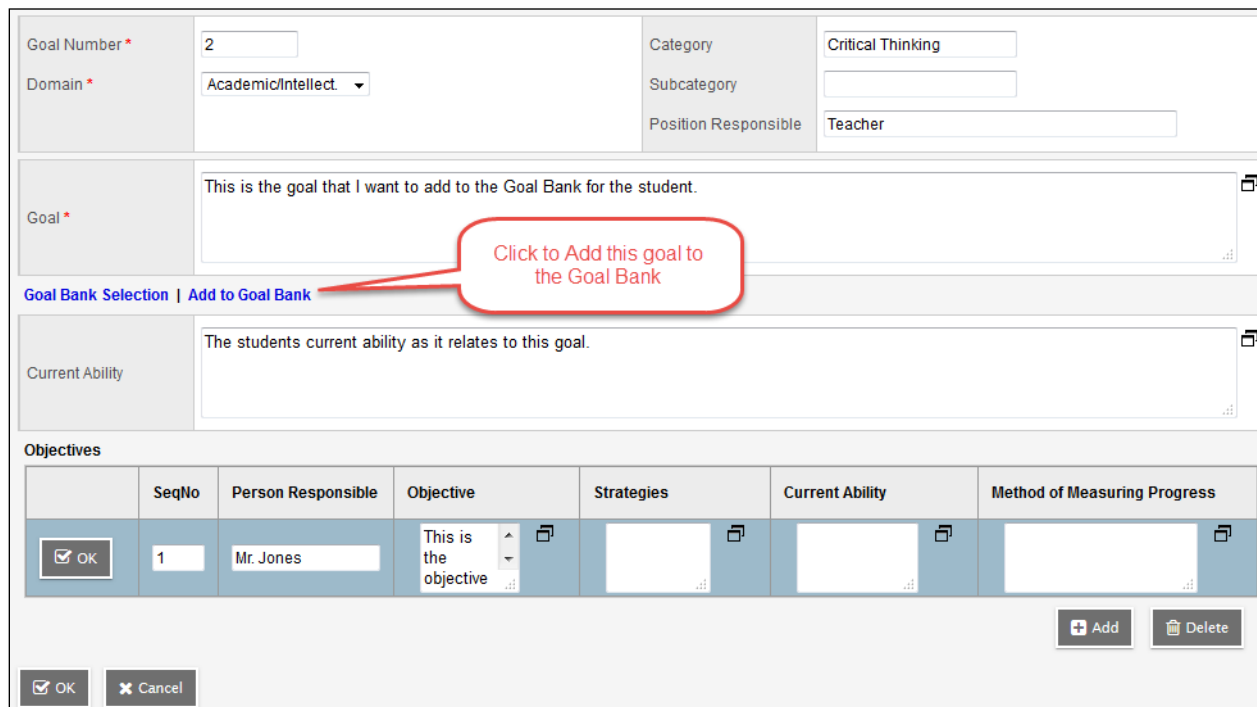
11.2 Adding Goals/Objectives to the User's Goal Bank

11.2.1 Adding Goals and Objectives to the Goal Bank from within the Plan

While working within a student's Plan under the Goals and Objectives tab, the user can enter the goal and objectives and then save this to their goal bank.

1. Click Add to add a goal for the student.
2. Enter Goal number and Domain.
3. Enter the Goal.
4. Click *Add to Goal Bank*, to initiate the wizard.
5. Complete the necessary fields presented in the goals popup window first, before entering objectives. Users can add objectives before saving to the goal bank. From the Objectives sub-top tab enter the related objective(s). The OK button beside each objective must be clicked before returning to the Goal sub-top tab. Clicking the lower OK will save the goal and objective(s), returning the user to the IEP; whereas, clicking the one beside the objective will allow the user to go back to the goal screen and then add these to the goal bank. Failing to click on OK next to the objective will not display these for selection to the goal bank.

Objectives can also be added from within the Add to Goal Bank Wizard. If added in the wizard, the user will have to return to the Objectives within the popup shown above and complete the missing objective fields. Once the goal and objectives have been completed, click on **Add to Goal Bank**.



Goal Number *	<input type="text" value="2"/>	Category	<input type="text" value="Critical Thinking"/>			
Domain *	<input type="text" value="Academic/Intellect"/>	Subcategory	<input type="text"/>			
		Position Responsible	<input type="text" value="Teacher"/>			
Goal *	<input type="text" value="This is the goal that I want to add to the Goal Bank for the student."/>					
Goal Bank Selection Add to Goal Bank						
Current Ability	<input type="text" value="The students current ability as it relates to this goal."/>					
Objectives						
	SeqNo	Person Responsible	Objective	Strategies	Current Ability	Method of Measuring Progress
<input checked="" type="checkbox"/> OK	1	Mr. Jones	This is the objective			
						<input type="button" value="+ Add"/> <input type="button" value="Delete"/>
<input checked="" type="checkbox"/> OK <input type="checkbox"/> Cancel						

Step 1 of the wizard presents the user with options to create a new entry in the goal bank or edit an existing entry.

Add to Goal Bank: Goal Selection
Step 1 of 4

Selection Type

New Goal Bank Entry
 Update Existing Entry

Selecting, New Goal Bank Entry brings the user to step 2 of the wizard. **Both the Category and Sub-category fields are required.** The Identifier will be generated by the system but can be changed by the user. The Student Names field will be populated by the name of the student as displayed in the text of the goal. These will be removed from the goal and objectives when saved to the goal bank.

Add to Goal Bank: Identifying Info
Step 2 of 4

Category	<input type="text" value="Communication"/>	<div style="border: 2px solid green; padding: 5px; display: inline-block; color: red; font-weight: bold;">Required Fields</div>
Sub-category	<input type="text" value="Critical Thinking"/>	
Owner	<input type="text" value="Plewes, Sandi"/>	
Identifier	<input type="text" value="COM-CRI-U001"/>	

Please enter the student names that are present in the text. These names will be removed from the goal and objectives before adding them to the bank. Separate multiple names with commas.

Student names	<input type="text" value="Mochu"/>
---------------	------------------------------------

Important: When adding to either the district goal bank or the user goal bank, both a category and sub-category are required fields.

Step 3 of the wizard provides the user an opportunity to modify the text of the goal as it will be saved for future use. Names and pronouns are replaced as shown below. When the goal is selected for students from the goal bank, the student name and proper pronoun will automatically be added to the goal statement.

Add to Goal Bank: Goal Text

Step 3 of 4

The following goal will be added to the bank:

This is the goal that I want to add to the Goal Bank for [student].

The final step in the wizard will display any objectives already created for this goal and will also present an opportunity to add objectives to be used with this goal. Be sure to click OK to select for saving with the goal in the goal bank. When ready, click Finish at the bottom right.

Add to Goal Bank: Objectives

Step 4 of 4

The following objectives will be added to the bank:

	SeqNo	Objective
<input type="checkbox"/>	1	This is the objective related to the Academic/Intellectual Goal
<input checked="" type="checkbox"/>	2	Enter the next objective here

11.2.2 Editing or Deleting Existing Goal Bank Entries

Goal bank entries are created from within the Plan, they are edited or deleted from the Global top tab > Goal Bank side tab. Goal bank entries are restricted to the specific user who created them.

To edit a goal bank entry, navigate to Global > Goal Bank. From the Goal Bank Entries list, click into the details of the entry for editing. Edit the Goal text and/or the associated Objectives. Click Save when done.

Note: If making a change to the Category or Sub-category, the Identifier will not change on Save.

To delete an existing record, click into the details of the entry from the Goal Bank Entries list. Go to Options > Delete. Multiple records can be selected for deletion from the Goal Bank Entries list. Go to Options > Delete. Note the pop-up message and the number of records selected.

Important: Do not add goal bank entries from the Global top tab. Entries created here will not display to the user for access in the Plan.

11.3 Adding Goals to the District Goal Bank

Goal bank entries can be created at the district level for use by student services staff in developing Plans for students. Goals and their associated objectives can be entered in order to be available to district and school staff with access to Student Services for creating Plans.

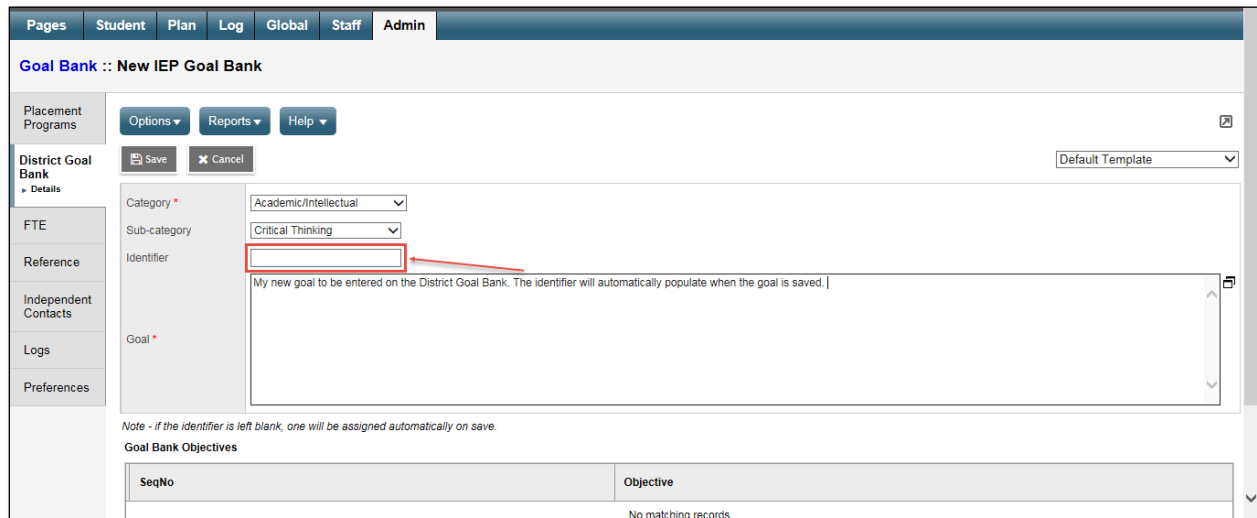
11.3.1 Adding a Goal to the District Goal Bank

To add to the district goal bank, begin in from the Student Services - Organization (District) View. Go to Admin top tab > District Goal Bank side tab.

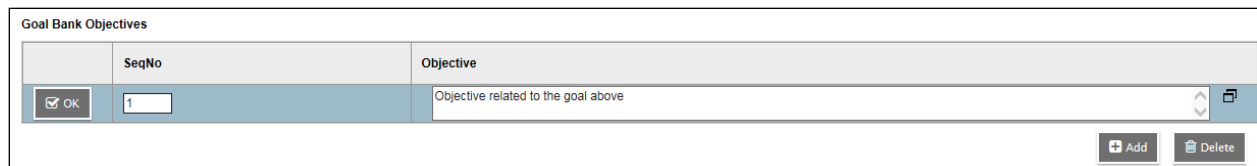
The list of district Goal Bank entries will display. To add goal bank entries go to Options > Add. The template that is presented is the same as that for the school user.

Select a **Category** and a **Sub-category**, these are both required fields.

Enter the Goal description.



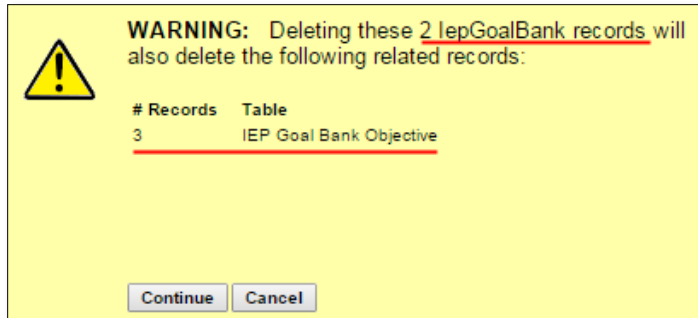
In the lower block, click the Add button to open an objective entry field. Sequence number defaults to zero but should be set appropriately. This is significant for Goal Progress Reports and the means to select the correct objective for reporting purposes.



Click OK to the left of the Objective. Use the Add button to add more objectives to the given goal; click Save to save the entire entry.

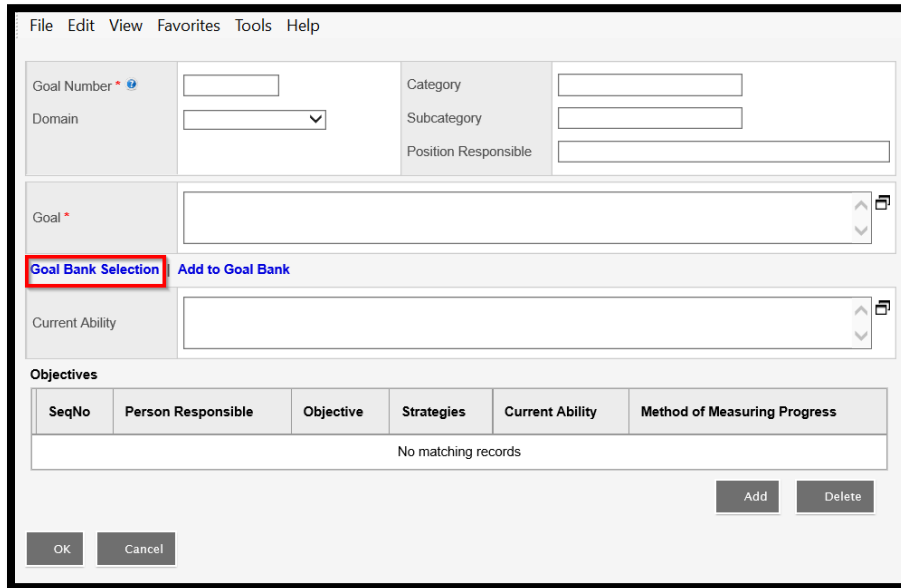
11.3.2 Deleting Goals from the District Goal Bank

Goals can be deleted from the district goal bank in the same fashion as for the user's goal bank. From the Student Services > Organization view, go to Admin > District Goal Bank. From the Goal Bank list, select those entries for deletion. The pop-up message will display the number of *lepGoalBank* records for deletion, as well as the number of related records which will refer to the objectives associated with the goals selected. It is always safest to do Show Selected before deleting records.



11.4 Using Goals from a User or District Goal Bank

From within the Plan > Goals and Objectives, Add a new goal. At the pop-up, click on **Goal Bank Selection**.



Goal Bank Selection

- Select from those goals saved to either the user or district goal bank
- Step 1 of the Goal Bank Selection wizard is to choose a category from the drop-down list and an associated sub-category
 - From the list click beside the desired goal to select



Identifier	Goal
<input checked="" type="radio"/> ACA-U001	Goal Added within the IEP

- Step 2 - Select Objectives of the wizard allows the user to select any objectives associated with the chosen goal by clicking Add button
- When complete, click the Finish button at the lower right of the screen.

Add to Goal Bank: Objectives
Step 4 of 4

The following objectives will be added to the bank:

	SeqNo	Objective
<input checked="" type="checkbox"/>	0	Use of ??? twice daily to improve fluency

When using goals and objectives from a bank, users must make sure to complete the remaining fields for both goals and objectives.

File Edit View Favorites Tools Help

Goal Number *	<input type="text"/>	Category	<input type="text"/>
Domain	<input type="text"/>	Subcategory	<input type="text"/>
		Position Responsible	<input type="text"/>

Goal *

Goal Bank Selection | [Add to Goal Bank](#)

Current Ability

Objectives

SeqNo	Person Responsible	Objective	Strategies	Current Ability	Method of Measuring Progress
No matching records					

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.

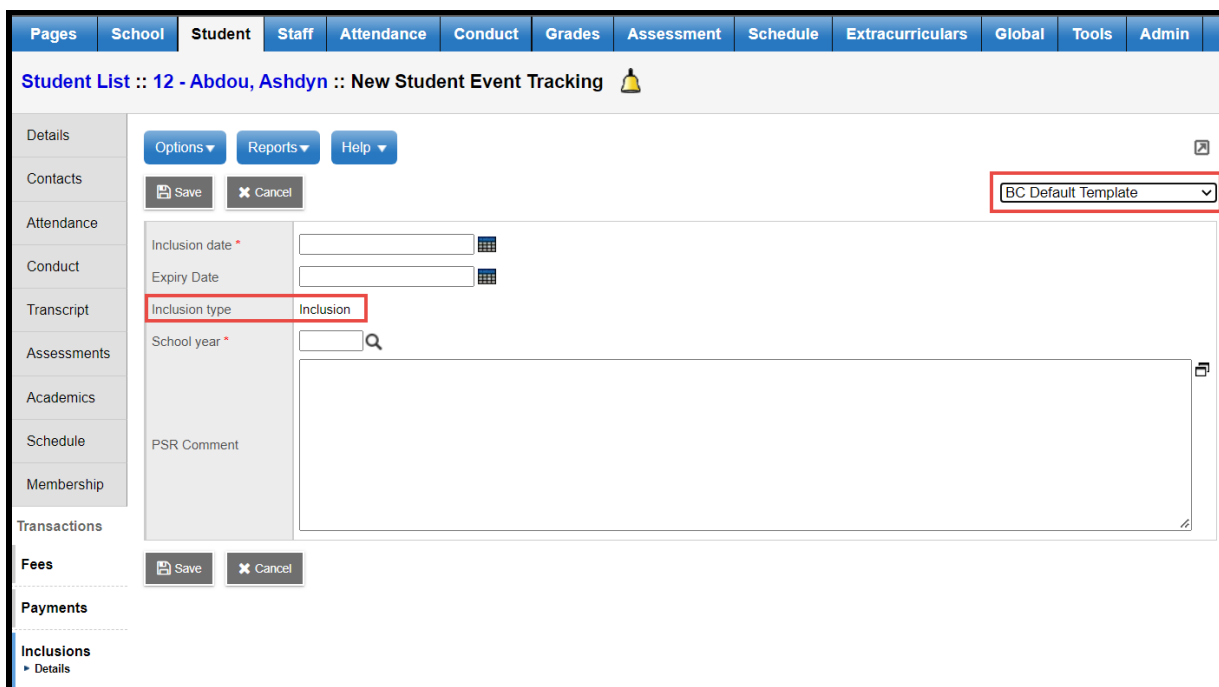
Default Fields

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:



The screenshot shows the 'Student List' interface for a student named Abdou, Ashdyn. The 'Inclusions' sub-tab is active. The interface includes a navigation menu on the left with categories like Details, Contacts, Attendance, Conduct, Transcript, Assessments, Academics, Schedule, Membership, Transactions, Fees, Payments, and Inclusions. The main content area has a top bar with 'Options', 'Reports', and 'Help' buttons. Below this are 'Save' and 'Cancel' buttons. A dropdown menu for 'BC Default Template' is highlighted with a red box. The 'Inclusion type' field is pre-filled with 'Inclusion' and is also highlighted with a red box. Other fields include 'Inclusion date', 'Expiry Date', and 'School year'.

Pages School **Student** Staff Attendance Conduct Grades Assessment Schedule Extracurriculars Global Tools Admin

Student List :: 12 - Abdou, Ashdyn :: New Student Event Tracking 🔔

Options ▾ Reports ▾ Help ▾

Save ✕ Cancel

Default Fields ▾

Inclusion date * 📅

Expiry Date 📅

Inclusion type *

School year

PSR Comment

Save ✕ Cancel

- a. In the *Inclusion date* field, type or use the calendar icon to select the effective date of the inclusion.
 - b. In the *Expiry Date* field, type or use the calendar icon to select the expiry date of the inclusion if applicable.
 - c. In the *School year* field, use the 🔍 icon to select the year the inclusion is recorded for.
 - d. Use the *PSR Comment* field to record the necessary information.
3. Click Save.

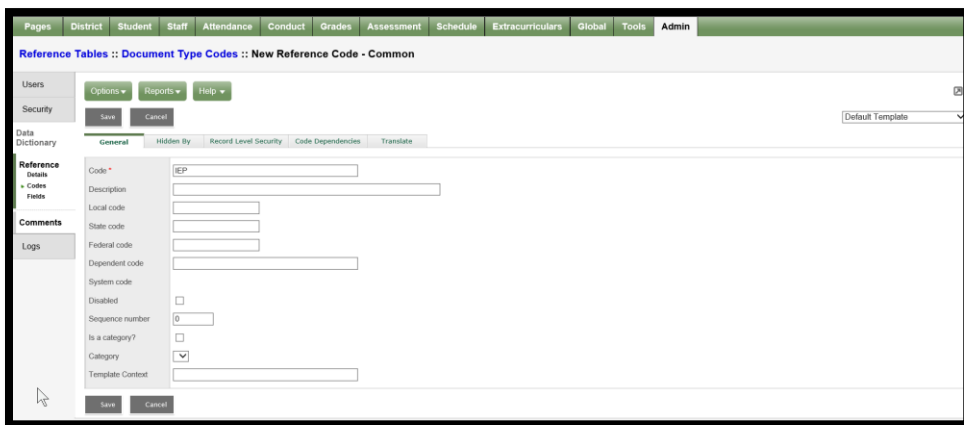
13.0 Security Restrictions for Documents

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

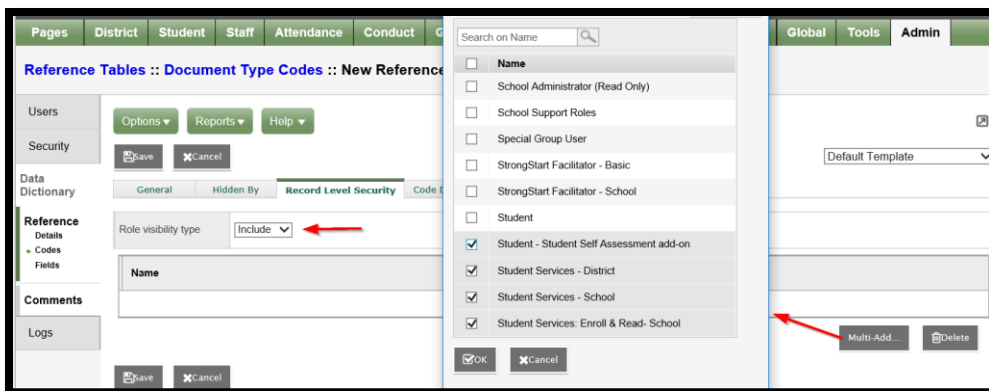
This functionality provides opportunity to save sensitive student files such as IEPs from other systems to the student record. These files will remain with the student record as the student moves through the system.

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.

1. **District View > Admin > Data Dictionary > Document Type Codes > Codes.** 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.



Reference Tables :: Document Type Codes :: New Reference Code - Common

Users: Options, Reports, Help

Security: Save, Cancel

Data Dictionary: General, Hidden By, Record Level Security, Code Dependencies, Translate

Reference: Details, Codes, Fields

Comments

Logs

Role visibility type: include

	Name
<input type="checkbox"/>	Student Services - District
<input type="checkbox"/>	Student Services - School
<input type="checkbox"/>	Student Services: Enroll & Read- School
<input type="checkbox"/>	Student - Student Self Assessment add-on
<input type="checkbox"/>	Student Services: Read Only - District
<input type="checkbox"/>	Student Services: Read Only - School

4. Save the changes.

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

5. **School View > Student > Document > Document > Options > Add.**

Pages: School, Student, Staff, Attendance, Conduct, Grades, Assessment, Schedule

Student List :: 04 - Abiabibpachecodesouza, Shielanicolette :: New Documents

Details: Options, Reports, Help

Contacts: Save, Cancel

Attendance

Conduct

Transcript

Assessments

Academics

Schedule

Membership

Transactions

Name: IEP Test

Type: IEP

Document:

Filename: 2017-07-06 10-42-11 AM.pdf

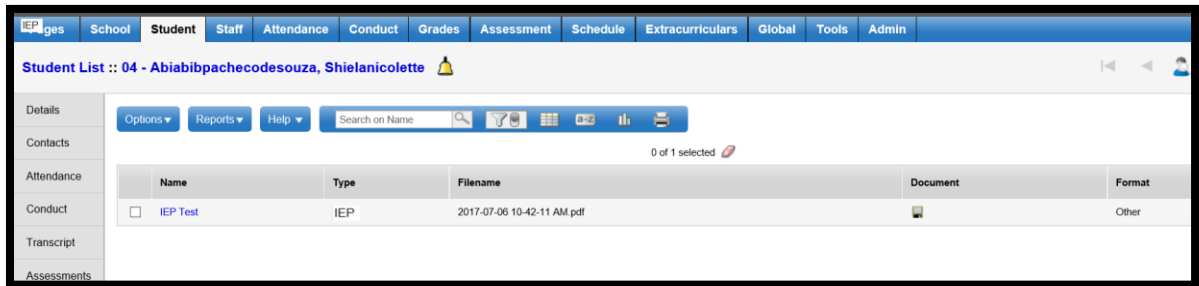
Format: Other

Save, Cancel

- Enter a name for the document in the template.
- 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.

- c. 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.
- d. 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.
- e. Click Save.



6. 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 that set in 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 Individual Education module, the following changes were made to the Enterprise roles. If Districts are using custom roles, they may need to make similar changes.

Role	Remove	Add
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 – Special Education View		
Publish Add On Role – Special Education School View		

Student Services – School

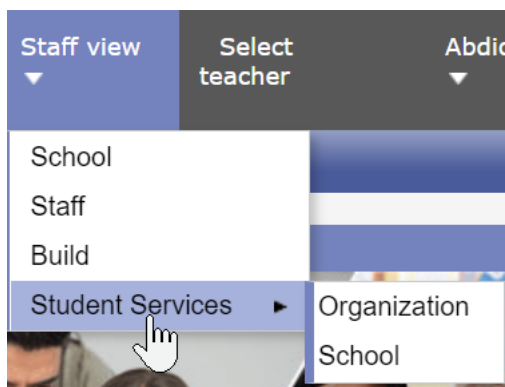
- As the role implies, the school level role is designed with the student support teacher/case manager in mind. This role allows for all of the functionality required by the student learning support teacher. MyEducation BC functionality allows for special education teachers who work at more than one 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.

- In districts that wish to assign the designation for students, using the Student Services – Enroll and Read role at the school level restricts the designation of students to the district role only.

Student Services: Enroll & Read – School

- This role is designed for the school user where the school assigns designations and may also be enrolling the student. This role allows the user to enroll students into student services, and to read a student plan.

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 – Special Education View

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

Publish Add On Role – Special Education School View

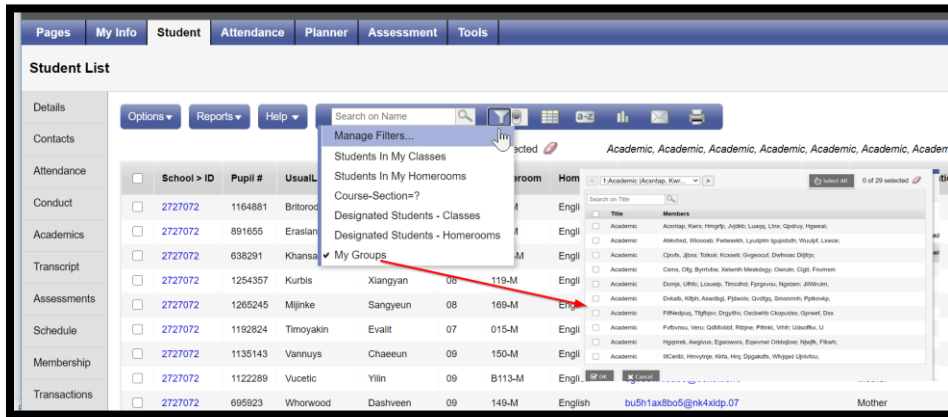
This role is for School Level Special Education Users. It gives access to the Special Education School View. This role allows users to Run Publish Add-on definitions at the Special Education School View. Users with this role can also publish Student reports to the portal.

Special Group User

Other school staff requiring access to students and their Plans, use the Special Group User role. This role gives the user Staff View, which in turn provides a Pages top tab and a Student top tab.

A snapshot of the students to be accessed for Plans, monitoring and tracking, will be created and maintained at the school level. The Special Group User then is made an administrator of this group.

Logging on to the Staff View, the Special Group User can click on the Student top tab; then click on the filter icon and select the My Groups filter. From the popup, select the group and click OK.



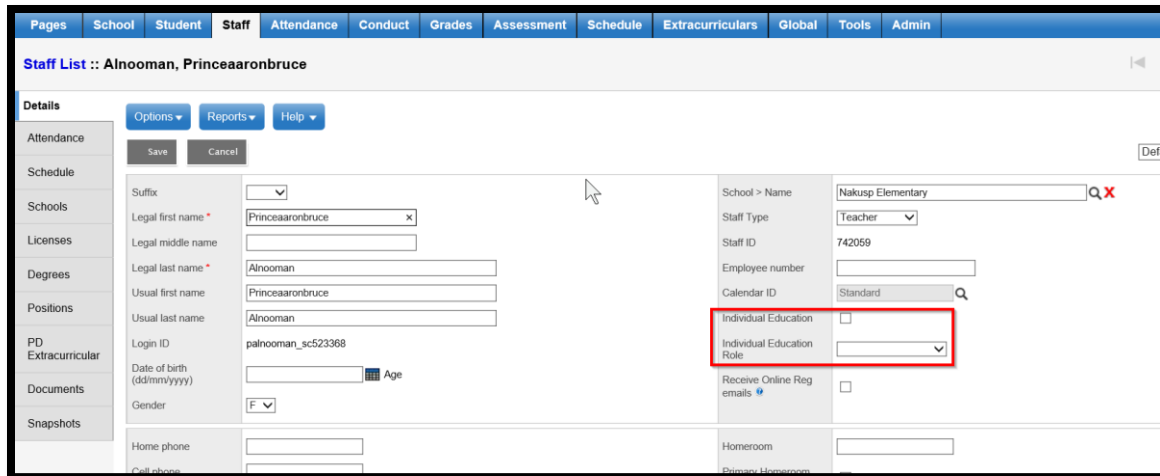
From the group's list of students, users can select a student and go to the Documents side tab > Plans. Plans are read only, and Plans can be printed if necessary.

14.2 Staff Details – Individual Education and Individual Education Role

Special Education

District/School > Staff > Details

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



The screenshot shows the 'Staff List :: Alnooman, Princeaaronbruce' details page. The form includes fields for personal information (Legal first name: Princeaaronbruce, Legal last name: Alnooman, Usual first name: Princeaaronbruce, Usual last name: Alnooman, Login ID: palnooman_sc523368, Date of birth, Gender: F), school information (School Name: Nakusp Elementary, Staff Type: Teacher, Staff ID: 742059, Employee number, Calendar ID: Standard), and special education settings. The 'Individual Education' checkbox is checked, and the 'Individual Education Role' dropdown menu is open, showing a list of roles. A red box highlights these two fields.

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

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