E-Com© User's Manual

V6.5

Washington State's
Special Education Forms and
Data Management System

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Chapter 1: Overview of System

Overview: What is E-Com?

E-Com is a multi-user relational database. Multi-user means that staff across a network can gather all of a student's forms in one location for easier review and auditing of student history. Though E-Com does not eliminate the requirement of printed forms stored in permanent student records, it does greatly simplify the process of creating and managing the forms. E-Com helps special education staff quickly create, store, and print special education forms, thereby helping to eliminate inconsistencies and promote compliance.

The purpose of the E-Com system is to allow special education teachers, psychologists, and other professionals to:

Better collaborate in a team environment and provide improved student support.
Create, store, and print special education forms required by the State of Washington for Special Education students.
Organize and store student, parent, school, and staff information related to students.
Promote compliance with state and federal requirements.

This manual will provide E-Com users with instructions on using the E-Com system.

Important Note about File Names

It is critical to the integrity of the E-Com system that the field names and suffixes ('.fp7') are not changed. Contact Portage Bay Solutions if you need to review a table name.

E-Com User Access Information

Users are given the following access privileges. The E-Com system administrators have the highest level of access and ability.

Admin	Can access and edit all files and can design forms. Has the ability to lock and unlock forms.
Manager	Can access and edit all files but does not have the ability to import or export data to or from E-Com. Is not able to edit locked forms. Can add student records. Most districts use this level of access for psychologists and SLPs, as they are often the first person to work with a new referral.
User	Can access and edit most data, but cannot perform design work on forms. Cannot edit locked forms. Cannot add student records, but may edit student demographic information.
User (Forms Only)	Similar to standard User level access, but can only edit form data, not student demographic data. Cannot add student records.
Browser	Can view all data in E-Com, but has no ability to edit data.

See the Administrator's manual for information on assigning access privileges.

General Application Features

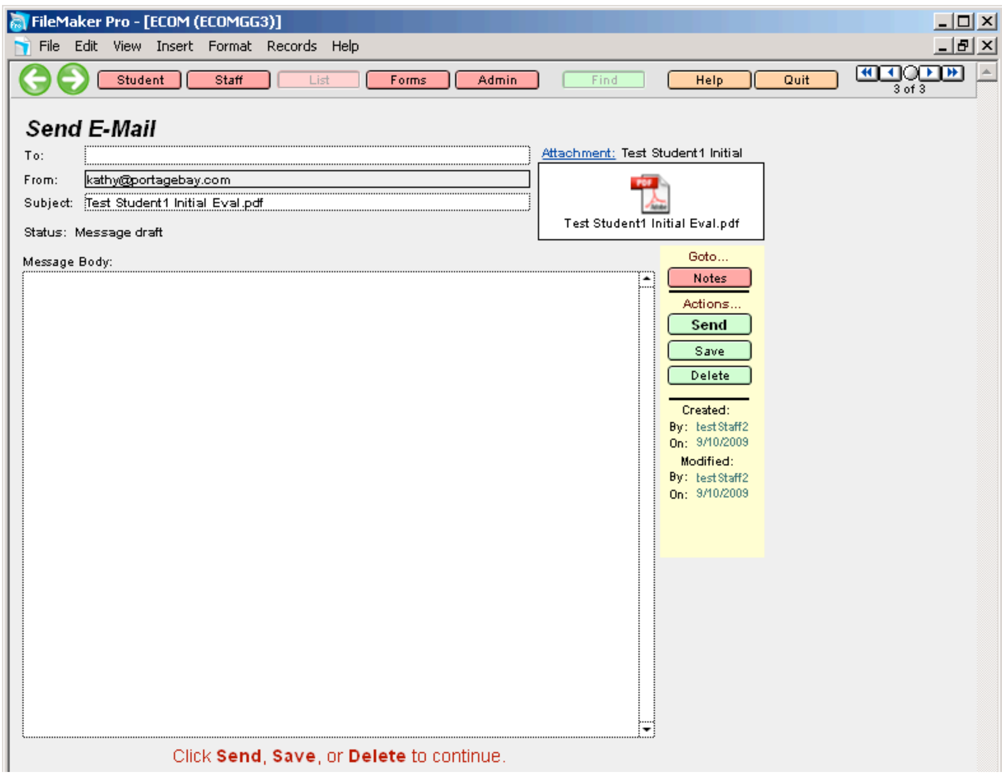
Email

On several screens within the application, users can email other users, parents or students. Any time a user sees an envelope icon, email is available, if an email address has been entered for that user. Upon clicking the icon, users will either be directed to a screen within E-Com or directly to the email application installed and configured on a user's computer, depending on the settings used for your district.

E-Com Email: Auto-Sender

If your district uses email within E-Com, clicking the email icon will direct users to the ***Send Email Screen****. From this screen, users can Send, Save or Delete messages.

****Note*** - Depending on what a user is emailing, you may be presented with additional dialogs asking you what documents you want to send before seeing this screen.



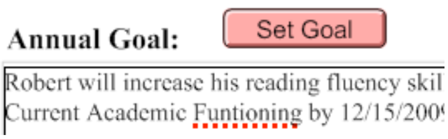
Sent and saved emails from within E-Com are archived and accessible on the ***Notes tab*** of the ***Student Screen*** for future reference.

Email via a user's individual computer

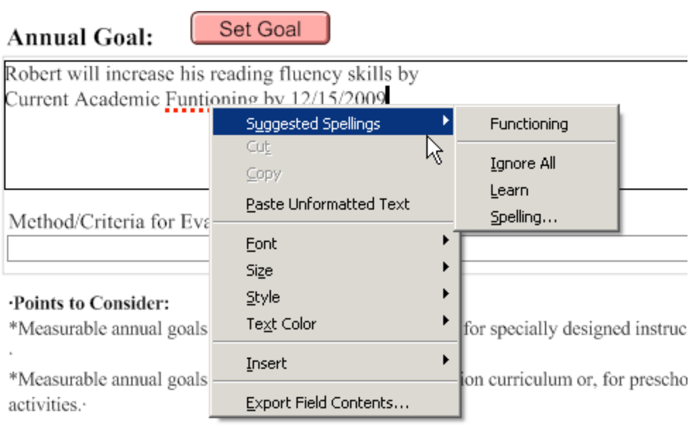
Districts that do not use E-Com's Auto Sender email may also be able to use the email feature if email is available via your individual computer. Some examples of email clients commonly used are Outlook, Outlook Express, Mac OS Mail, etc. If you are having problems with your email client, contact your school's Special Ed secretary or IT (technical support) department for assistance.

In-line Spell Checking

All text fields support in-line spell checking, similar to that found in Microsoft Word, when doing data entry in forms (or other areas of E-Com).



Misspelled words will appear with a dotted red underline.

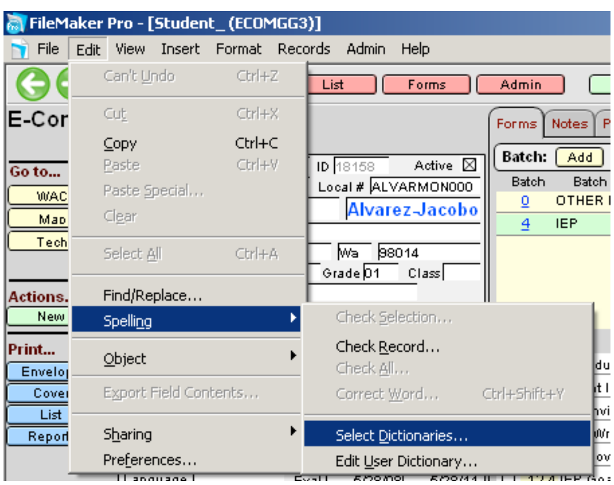


Right-clicking on the word will display a contextual menu that will give you suggested spellings.

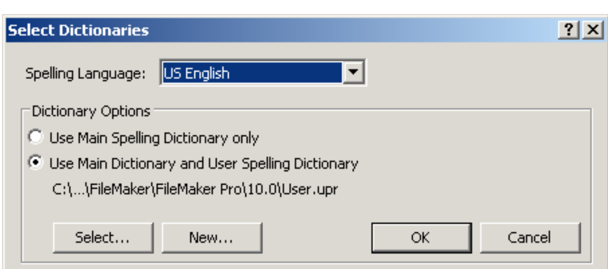
To add the word to your local user dictionary, select 'Learn' from the menu as shown.

If the 'Learn' option is grayed out, no local user dictionary has been created. See ["Adding Local Dictionary"]

Adding Local Dictionary



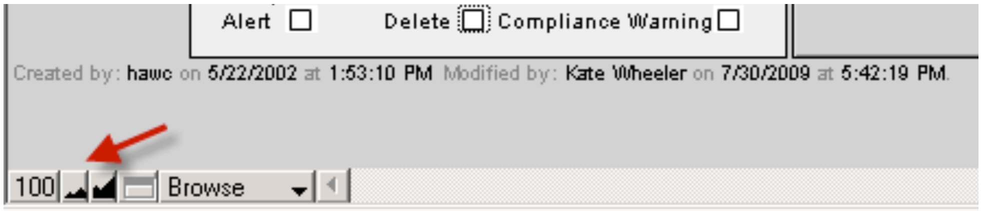
To create a local user dictionary, choose 'Spelling…Select Dictionaries' from the Edit menu to display the dialog.



Click the ***New*** button and then enter a location to save your dictionary. From this point onward, the 'Learn' option will be available when you right-click on a misspelled word.

Zoom In/Zoom Out

Any screen or form in E-Com can be viewed at normal size, or you can zoom in or out. You can still enter data when zoomed in or out. Many people prefer entering data on forms while zoomed in.

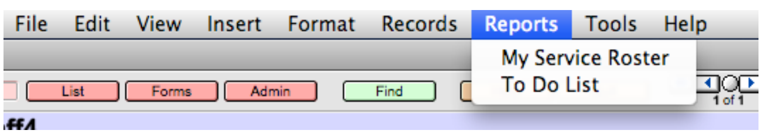


The icon on the left zooms out while the icon on the right zooms in.

In addition, you can now set whether you want forms to always open for you in zoom mode. On the staff screen, you can select “150% (Zoomed in)” in the Default Form Zoom field. When you next log in, each form you open will open at 150% of the usual size. This only works with forms; the student screen and other data entry screens will remain at 100%. For detailed instructions, see Default Zoom Settings.

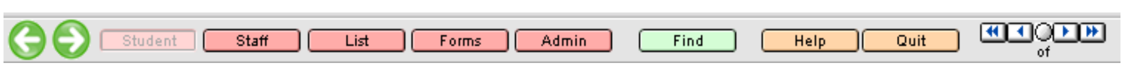
Reports

On the Menu bar at the top of the E-Com window, there is an option called “Reports.” This allows you to print your Service Roster or your To Do list with the click of a button. Your service roster consists of those of your students who have current services on the summary of services matrix form 14.1; if your district uses some other summary matrix form, this report will not contain valid data.



Navigation Bar

E-Com version 6 now provides a centralized Navigation Bar that is accessible via almost every screen of the application.



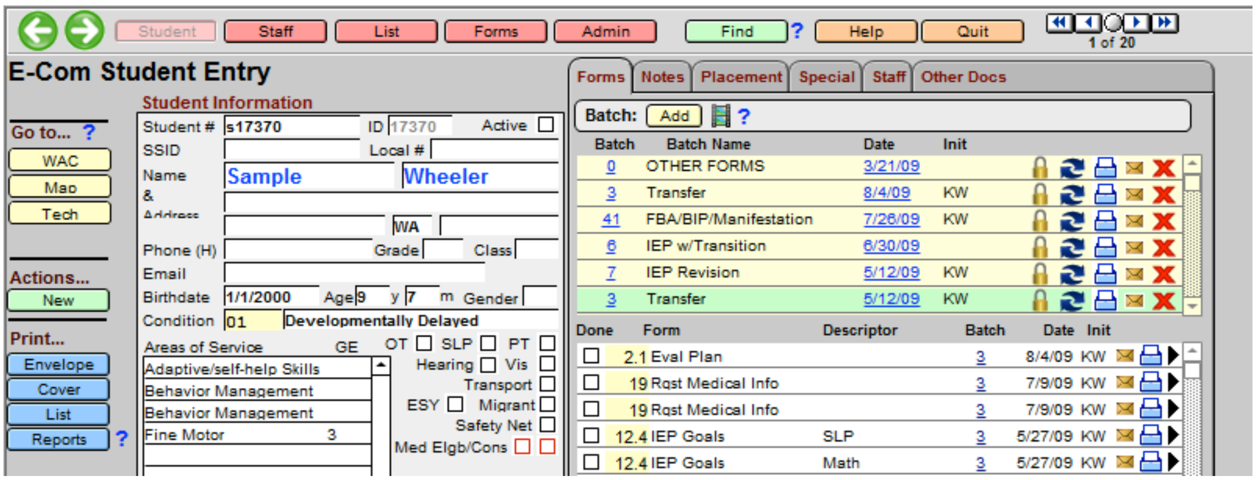
From the buttons on the ***Navigation Bar*** (left to right) users can:

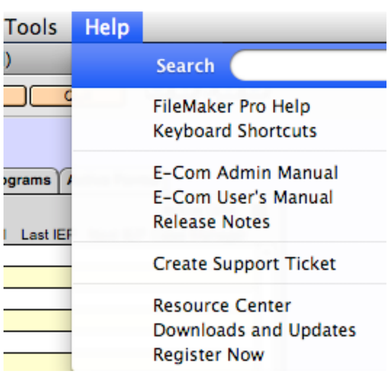
1) Back/Forward button - Navigate between actions performed within an E-Com session;
2) Student - Perform tasks related to student case management;
3) Staff - Manage your student caseload, including “to-do” task list functionality;
4) List - Display a list view of the current student, staff or forms set found;
5) Forms - View and manage the complete forms database (access may be limited to administrators in some districts);
6) Admin – Access administrative functionality (access limited to administrators);
7) Find - Search for a subset of students, forms, etc.;
8) Help - Activates help shortcuts for various features throughout the application;
9) Quit - Close out of the application;

10) Found set arrows - Navigate within the current set being viewed; the circle in the center of the arrows will show all records when selected.

Help

There are a number of Help options throughout E-Com. If you click on the Help button on the navigation bar, the system will display blue question marks that link to the related topics in the User's Manual. Click on any blue help icon to go to the webpage where the help topic is available. In addition, there are filmstrip icons that will bring you to a screencast on the topic. As you can see in the image below, there are textual help links for Find, Go to..., Reports, and Batch, and there is an available video on adding a batch.



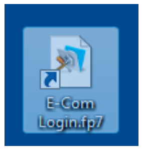
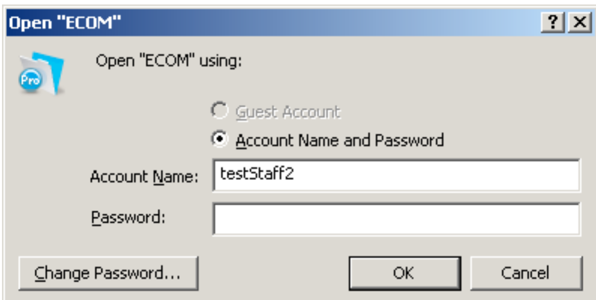


In addition, you can access the admin manual, the user manual, and the most up-to-date release notes from inside E-Com, by going up to the Help menu on the FileMaker menu bar.

If you have a version of E-Com more recent than v6.28, you can also create a support ticket directly from E-Com using the "Create Support Ticket" option. For non-administrative users, an email with a blank address will come up; they should enter the email address of their local E-Com administrator, along with additional details of the problem. (If necessary, the admin user may then forward the issue to the E-Com support email.)

Chapter 2: E-Com User Log-in Procedures

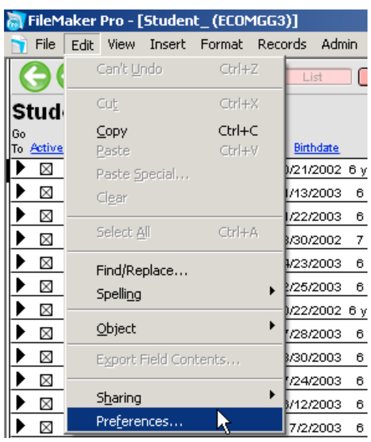
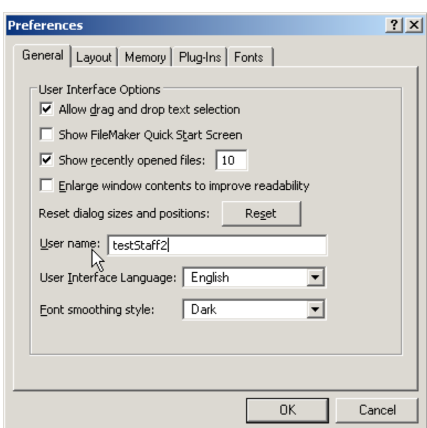
E-Com Log-in Procedure

<table>
<tr>
<td>
</td>
<td>Find the “E-Com Login.fp7” icon on your hard drive and double-click it. This will generally be on your desktop.</td>
</tr>
<tr>
<td>
</td>
<td>The E-Com Login screen will appear.

Enter the user name and password assigned to you by the system administrator and click OK.

IMPORTANT: Do not click the Change Password button if you want to change your password. Instead, see “Edit Login/Password” for instructions.</td>
</tr>
</table>

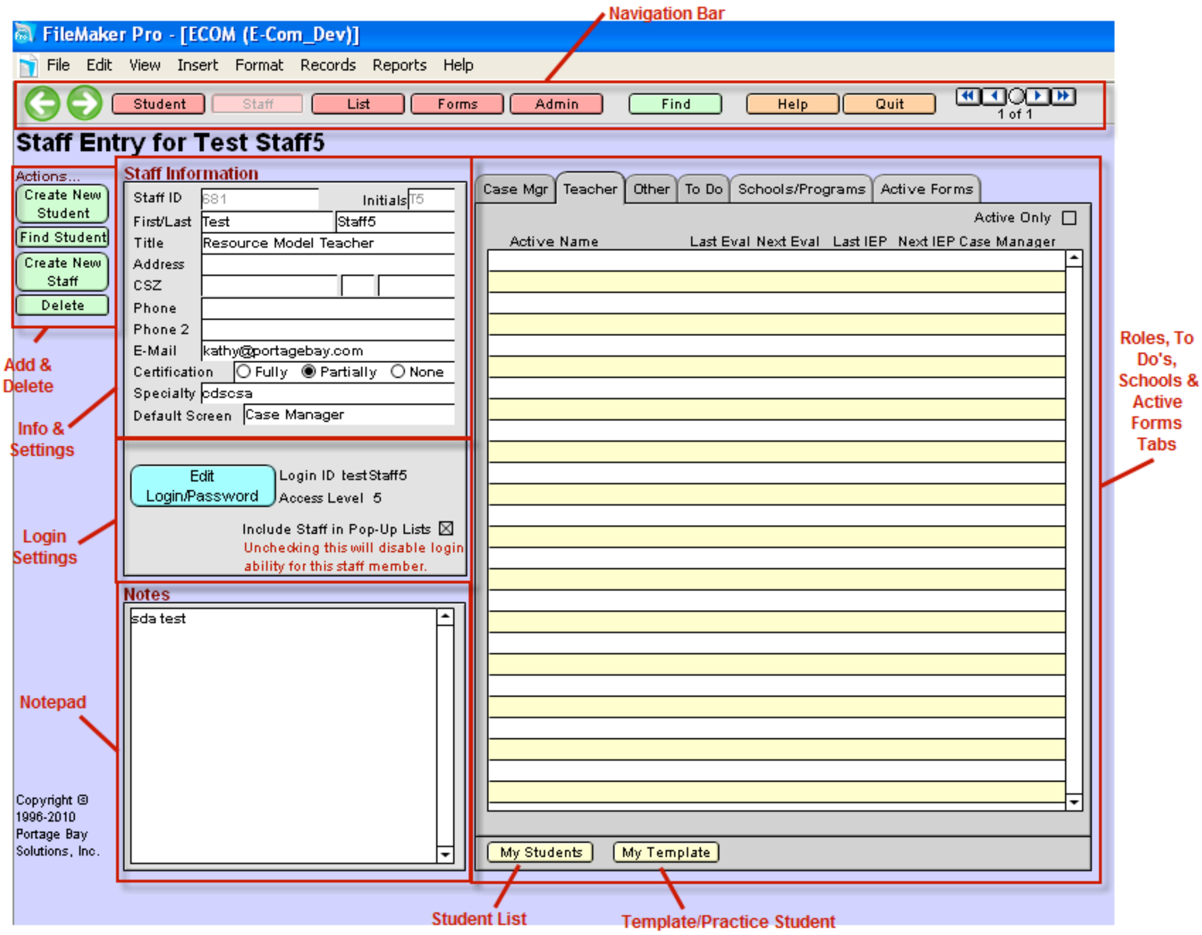
Setting Default User for Login Screen

<table>
<tr>
<td>
</td>
<td>Depending on your computer configuration, the login dialog shown above will most likely not default to your E-Com Account Name. To change the default, select ‘Preferences’ from the Edit menu and change your User Name as shown below.</td>
</tr>
<tr>
<td>
</td>
<td>Change your Default User Name by entering it in the User Name field.</td>
</tr>
</table>

Chapter 3: Staff Screen

Screen Overview

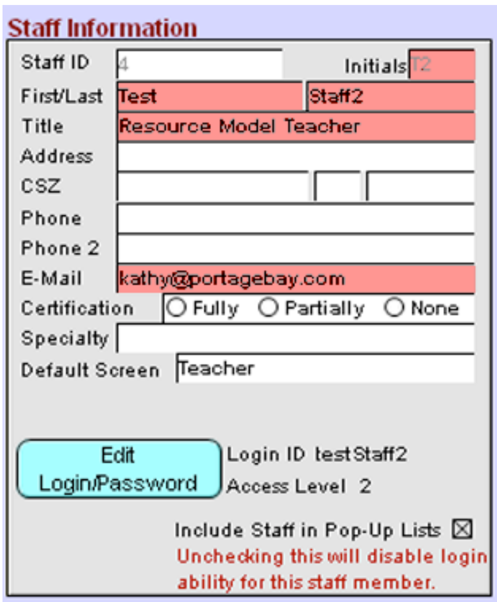
Upon opening E-Com, users will go directly to the screen shown below.



Note - Tab view will default to the selection chosen in the ***Default Screen*** field. If there is an outstanding To Do item, the Tab view will automatically default to the "To Do" tab.

Information & Settings

To the right of the Add & Delete buttons you will find the ***Staff Information*** area. This section of the Staff Screen contains all of the staff member's personal information. The fields are typically filled in when the staff's login is created, but may be edited as information changes.



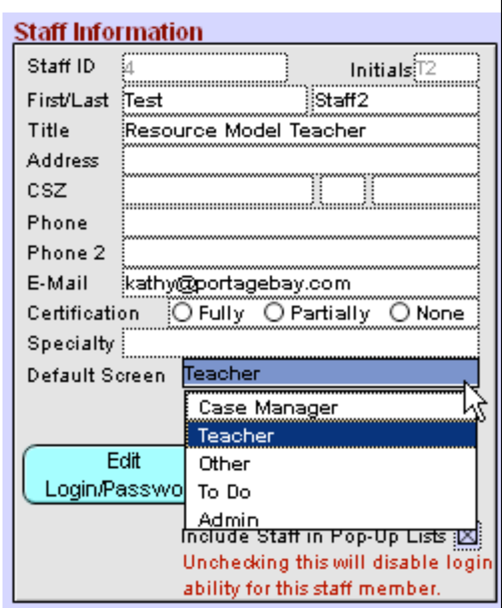
For best practices and in order to take better advantage of E-Com functionality, we recommend that the fields **highlighted in red*** be populated for all users. All other fields are optional.

Note: Fields highlighted in the image to the left are NOT highlighted within the application itself.

If you have a version of E-Com more recent than v6.28, you will also have a zoom preference option, where you can set all forms to be opened at either 100% (the default) or 150% (some staff find this more readable). This setting, if you have it, is directly above the "Edit Login/Password" button.

Default Screen Settings

Near the bottom of the Staff Information area, you will find the ***Default Screen*** setting.



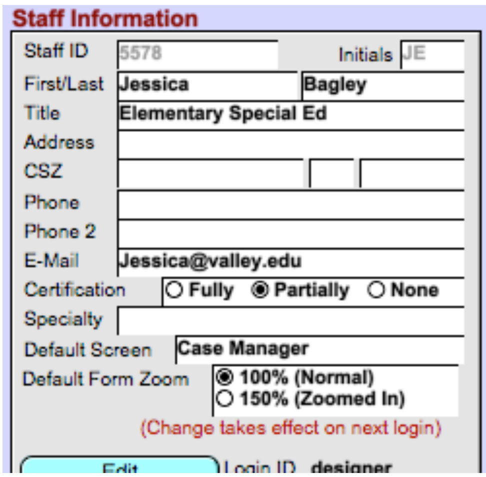
Choose an option from the Default Screen drop down to set your preferred default tab for each time you access your staff screen.

If you have an outstanding To Do item, that tab will take priority over your default tab.

*** Note*** - The Admin screen can only be chosen by Admin users (access level 2).

Default Form Zoom Settings

On the bottom of the Staff Information area, you will find the ***Default Form Zoom*** setting.

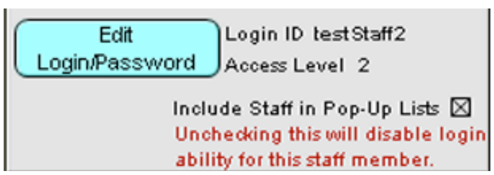


Choose either the 100% (Normal) or 150% (Zoomed In) option to set your preferred zoom level for forms.

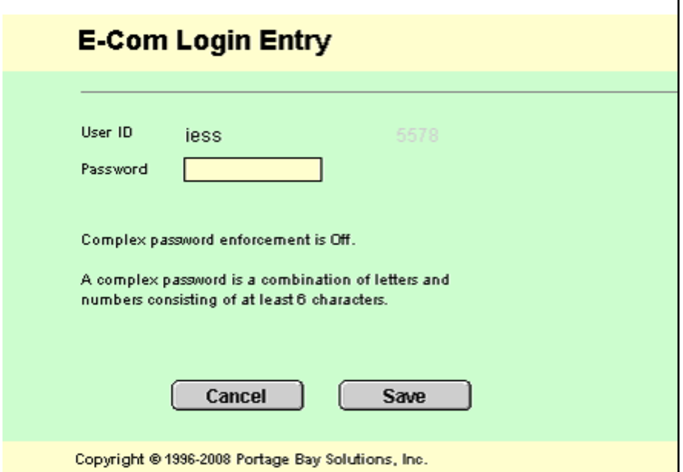
The change will take place upon your next login.

Note: This works only for forms. For all other screens, you will need to use the zoom option at the lower left of the window (to the left of "Browse").

Login Settings – Editing Your Password



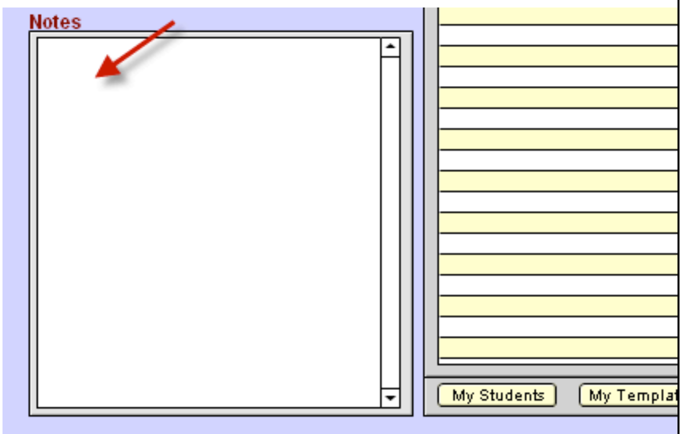
From the ***Staff Information*** area of the Staff screen, click on the ***Edit Login/Password*** button.



The E-Com Login screen will pop up. From here, you may type in and change your password directly.

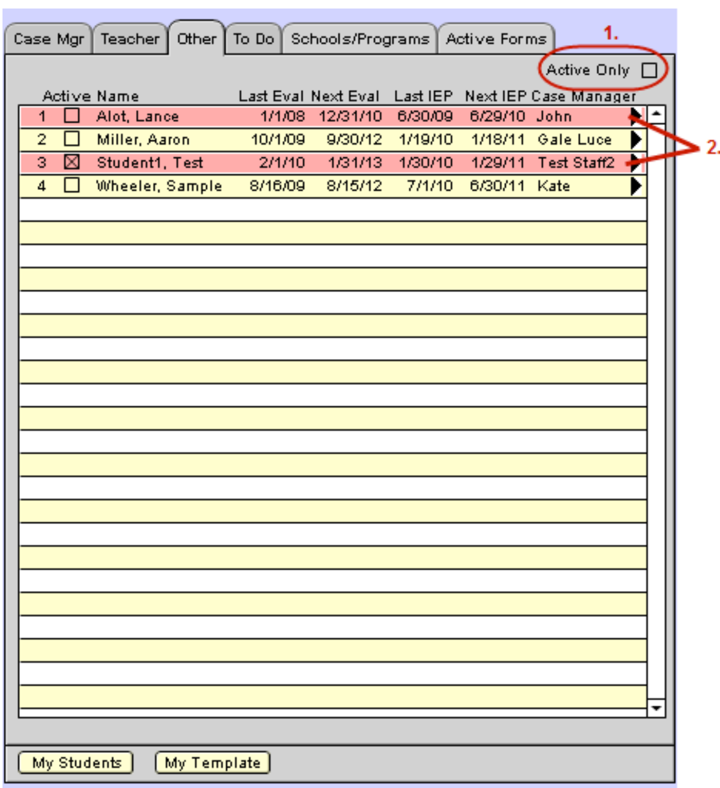
Once you have finished, click "Save" to continue or "Cancel" to return to your screen without saving the changes.

Notes Notepad



This field can be used as a notepad for text-based comments or notes of any kind.

Roles Tabs – Case Manager, Teacher & Other



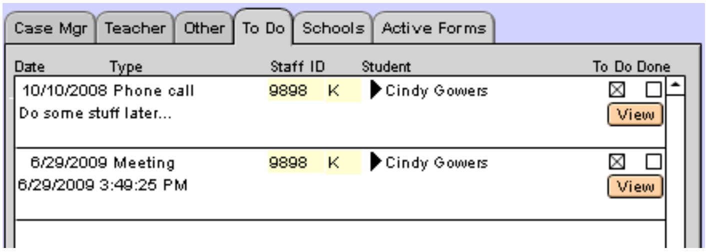
The ***Case Mgr, Teacher and Other*** tabs on the staff screen show the students assigned to the staff person in those roles. In other words, the ***Case Mgr*** tab shows the students for whom the staff member is the case manager; the ***Other*** tab shows the students for whom the staff member is the SLP, OT, PT, Psychologist, etc.

1) ***Active Only*** checkbox - When this box is unchecked, all students assigned to the staff member will be displayed regardless of their active/inactive status.

2) Row highlighting - If a row is highlighted in this screen, it means that an entry on the ***Notes tab*** from the ***Student screen*** is set as "***To Do***".

Note - Eval and IEP dates will be color coded based on district preferences.

To Do Tab



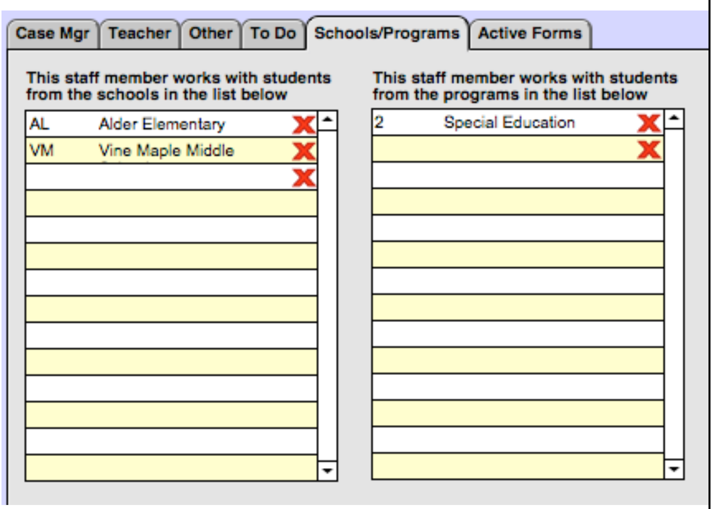
The ***To Do*** tab displays items marked as "To Do". They are set for a particular student within that student's ***Notes tab***.

To review the note details, select the ***View*** button. This will take you to the ***Notes Details Screen***.

To **print** the contents of this tab, see ***"Print shortcut - To Do List"***

Once items are marked as done, they will automatically be removed from this list.

Schools/Programs Tab



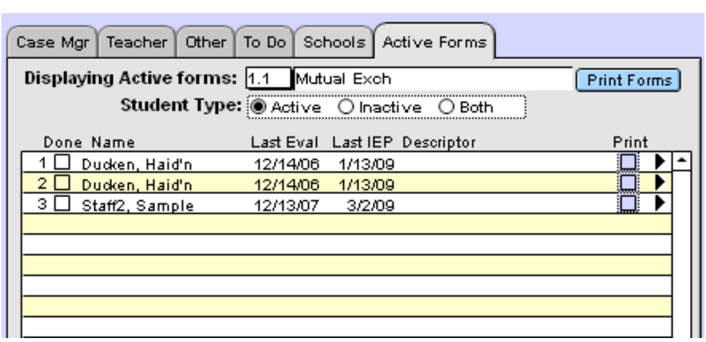
The ***Schools/Programs*** tab lists schools and programs for the student(s) this staff member supports.

Depending on the settings chosen by a district, access to students in districts, schools and programs *not listed here* may be limited.

Note - Use of this tab varies by district, so check with your Special Ed secretary for further instructions.

Active Forms Tab

This tab gives users quick access to specific student forms for the given staff member's student load (i.e., the staff person filling any of the roles for the student: Case Mgr, Teacher, SLP, OT, etc.)



From this tab, staff members can:

View any active forms for their students, whether those students are active or inactive, or both (setting defaults to Active).
Print forms or form sets.

To **View Forms**:
Select the form you want from the drop-down list next to "Displaying Active forms" and choose the Student Type. Students with that form in their records will appear below.
Select any row displayed for a particular student to view the form.
To return to the active forms tab from the form itself, select "Go to Staff" from the Forms Options menu along the top of the window.

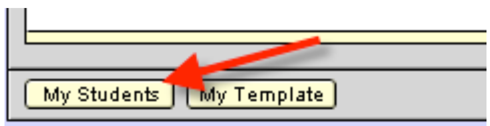
To **Print Forms**:
Select the Print checkbox for one or more students' forms.

- Then select the ***Print Forms*** button.

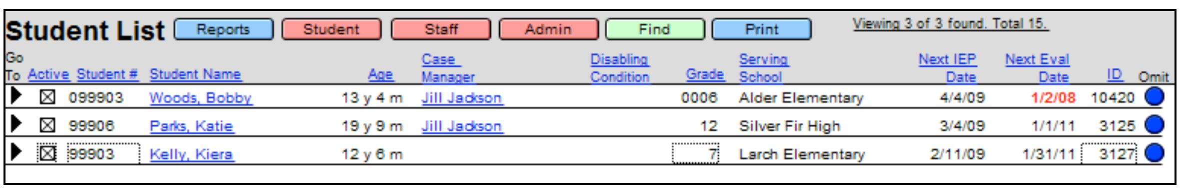
Student List - "My Students" Button

At times it is useful to be able to sort or generate reports on the groups of students you manage.

To do so, select any one of the student listing tabs (Case Mgr, Teacher or Other) then click the ***My Students*** button at the bottom of the tabs on the Staff screen as shown.



The Student List for the tab selected will be displayed as shown below.



Sorting

This list of students will be the same as viewed on the staff screen, but allows the list to be sorted using the column header sort buttons. The default sort order is in descending order by Next Eval Date, so students with the closest next evaluation date will appear at the top.

IEP & Eval Date Color Coding

Throughout the application, the Next IEP Date and the Next Evaluation Date fields are color-coded. Depending on the district preferences, the color of the dates will change to:

- **Green** - when the IEP or Evaluation should be started (the 1st warning);
- **Yellow** - If the student is developmentally delayed and is within 60 days of his/her 9th birthday; or if the student is within 120 days of his/her 3rd birthday and the evaluation date is older than that date, the Next Evaluation Date will turn yellow.
- **Red** - when the IEP or Evaluation due date is getting very close (the 2nd warning).

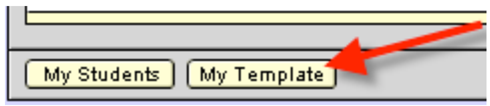
The default settings for the IEP warnings are 30 and 7 days respectively for the 1st and 2nd warnings. The Evaluation defaults are 60 and 14 days.

To easily find, print or export a list of all students assigned to a particular staff member, do a find for that staff member. On their Staff screen, select the tab for the role you are interested in (case manager, teacher, other) and click the “My Students” button. From the list that appears, select the “Print” button. From here, you can export the list as an Excel document, email it as a PDF, or print it.

Template/ Practice Student - “My Template” Button

It is very common in E-Com for a staff member to have a student record where they create forms and batches for practice purposes and where they can duplicate forms for later re-use.

To quickly and easily access your template/practice student area, click the ***My Template*** button at the bottom of the tabs on your staff screen.

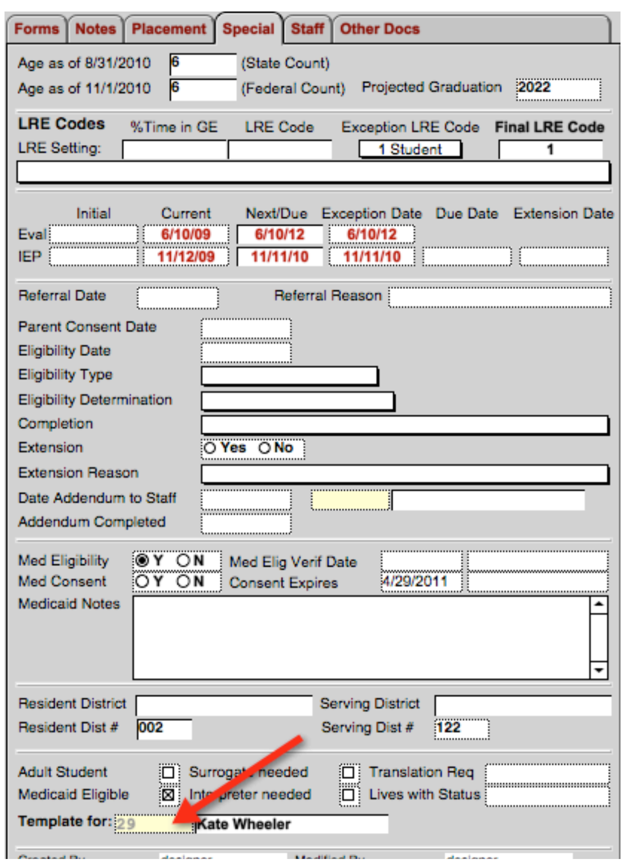


Creating a Default Template (Practice) Student

If you don’t already have a template student, E-Com will offer to create one for you when you select the ***My Template*** button. This will automatically create a new student entry with a ***First Name*** of “Sample” and the ***Last Name*** of the logged in user, including default settings of the ***Student #*** and ***Case Manager*** fields. Once created, the user can practice actions or modify this student record without affecting an actual student record.

Assigning an Alternate Template Student

If you already have a practice student set up and don’t want to start over with the template, you can tell E-Com to use this practice student as your template student.



Access the Student screen for the student you want to assign as your template student, either by running a find or navigating to their Student screen by another method.

Click the [***Special tab***](#) as shown at right.

Finally, select yourself from the ***Template For*** popup menu at the bottom as shown.

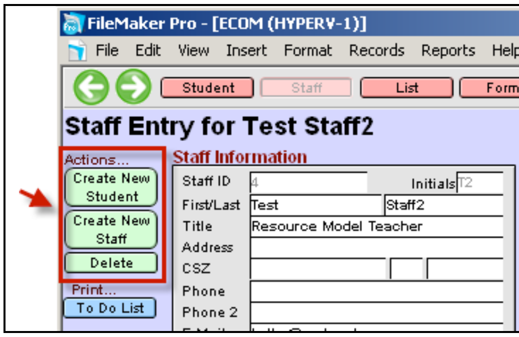
***Note* - Be cautious if you are selecting a real student as your template.** Any changes made to a template record will make *real time changes* to that record.

To return to the Staff Entry screen from this screen, click on the “Staff” navigation button.

Additional Features Available on the Staff Screen

For user convenience, the following useful features are also available via easily accessible buttons.

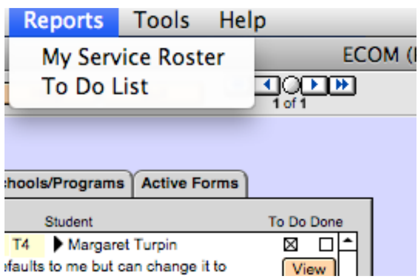
Add & Deletes



To add or delete staff entries, select the appropriate button shown. These actions are reserved for Admin and Manager users (access level 2 & 3 respectively).

Admins can perform any of the actions while Managers can only use the "***Create New Student***" button.

Print Shortcut - To Do List/Service Roster



To print the contents of the ***To Do tab*** in a list format, select the ***To Do List*** menu item shown.

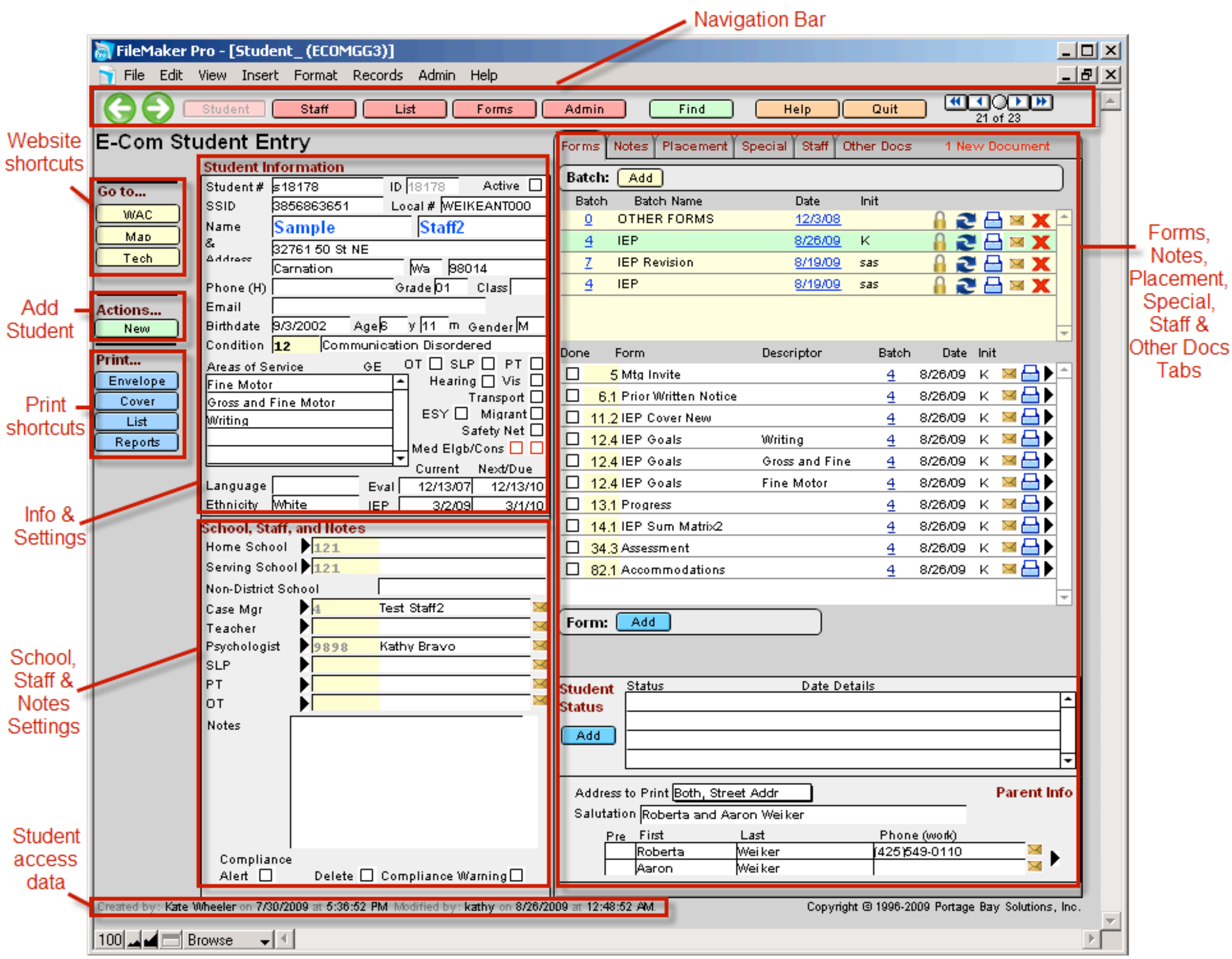
Select ***My Service Roster*** to get a copy of your assigned students and minutes. You may also print, email, or export other staff's rosters to an excel document. Simply do a find for the staff member, and on their staff page, go up to the Reports item and select "My Service Roster."

Chapter 4: Student Screen

Screen Overview

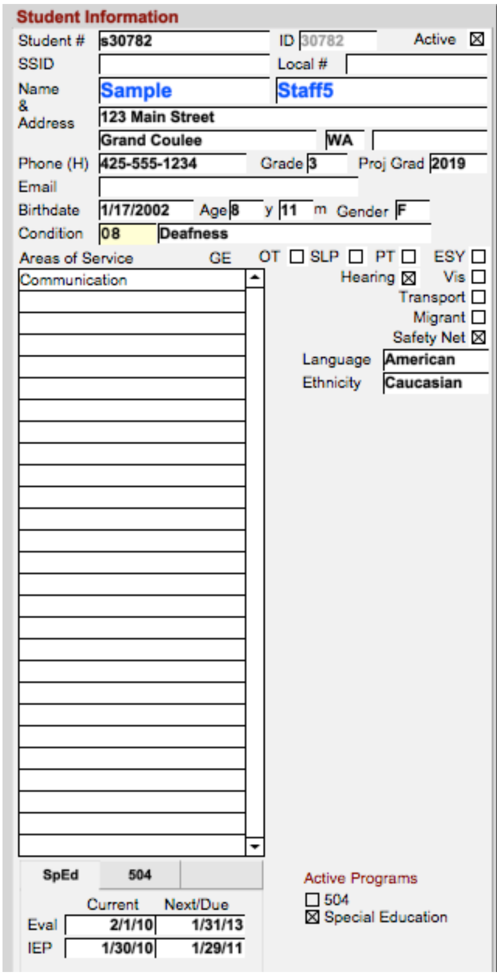
The Student Entry screen is where all the information for a student is entered and stored. From this screen, users can access and/or manage (depending on their privileges and the setup at their district) a variety of items related to a particular student, including but not limited to:

Student identifying information such as address, age, area of service needs, etc.
School information such as home, serving, and other non-district schools.
Teacher, case manager, and other staff assignments
Forms and batch management – Creating, accessing, emailing and printing
Printing shortcuts for envelopes, labels, cover sheets, and other reports.
Parent information.



Information & Settings

To the right of the website shortcut (Go To …) buttons, you will find the ***Student Information*** area.



Data may be edited here by authorized staff members as information needs updating.

From this section, users can view:

1) **Student demographic data** – address, phone, "Active" status, disabling condition, language, etc.
2) **Student's Areas of Service** – this is a view of the services defined* for the student.
3) **Quick "keyword" classifications** – this is done via various keyword checkboxes** to the right of the Area of Services section

   For example: "Transport" denotes whether a student requires transportation in order to receive services.
4) **Eval and IEP dates** – Any updates made to these fields **after** the forms/batches have already been added to a student may be updated by using the ***Refresh*** button on the ***Batch listings***.

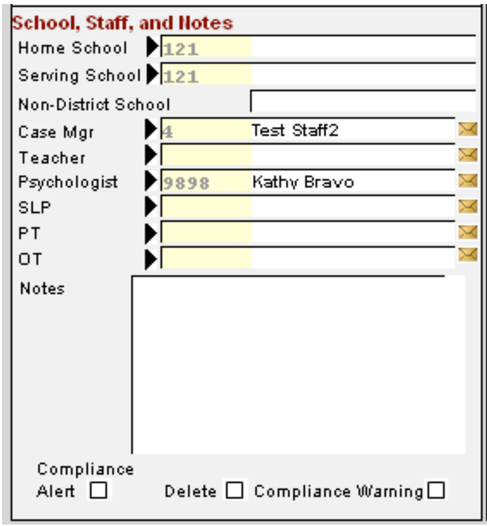
* Depending on your district's policies, services are entered via varying processes. Please check with your Special Ed secretary for further instructions.

** Use of these checkboxes varies by district, so check with your Special Ed secretary for further instructions.

Note: Some districts import data nightly from the school's Student Information System (SIS). If your school uses imports, many changes made manually on the Student screen will be overridden by the data imported from SIS. Check with your E-Com Admin to know which scenario applies to your district.

School, Staff and Notes Settings

Under the Student Information area, you will find the ***School, Staff and Notes*** settings.



1) **Schools:**

   This section contains the schools associated with a student including: Home, Serving, and other Non-District schools.

   Depending on your district's settings, selecting the black triangle next to the Home or Serving school may take you to the ***School Data Entry Screen***.

2) **Staff:**

   Case managers, teachers, psychologists, speech/language pathologists, and physical and occupational therapists can be set here. ***Note***: The 504 case manager, if any, may be set by clicking on the 504 tab directly above this section.

   Selecting the black triangle next to any of the staff assignments will take you to the ***Staff Screen***.

   Staff members listed here may also be emailed directly by selecting the envelope icon.

3) **Notes:**

   Like the Staff screen, this field can be used as a notepad for notes of any kind.

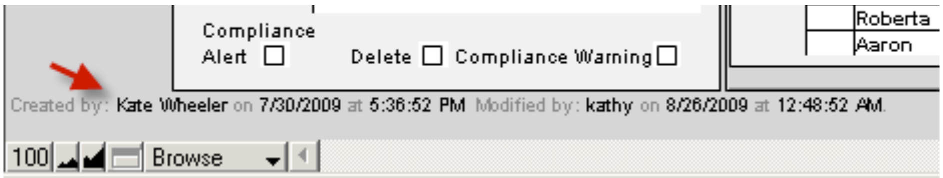
4) **Alerts & Warnings:**

   A checked Compliance Alert box means the student is active and
   - either the next IEP date has passed; or
   - the next evaluation date has passed; or
   - his/her condition is developmentally delayed and s/he is older than 9 years old; or
   - the student is within 120 days of his/her third birthday and the next evaluation date is outside that timeframe.

   A checked Compliance Warning box means the student is active and either the areas of service are not aligned or the Medicaid expiration date has passed.

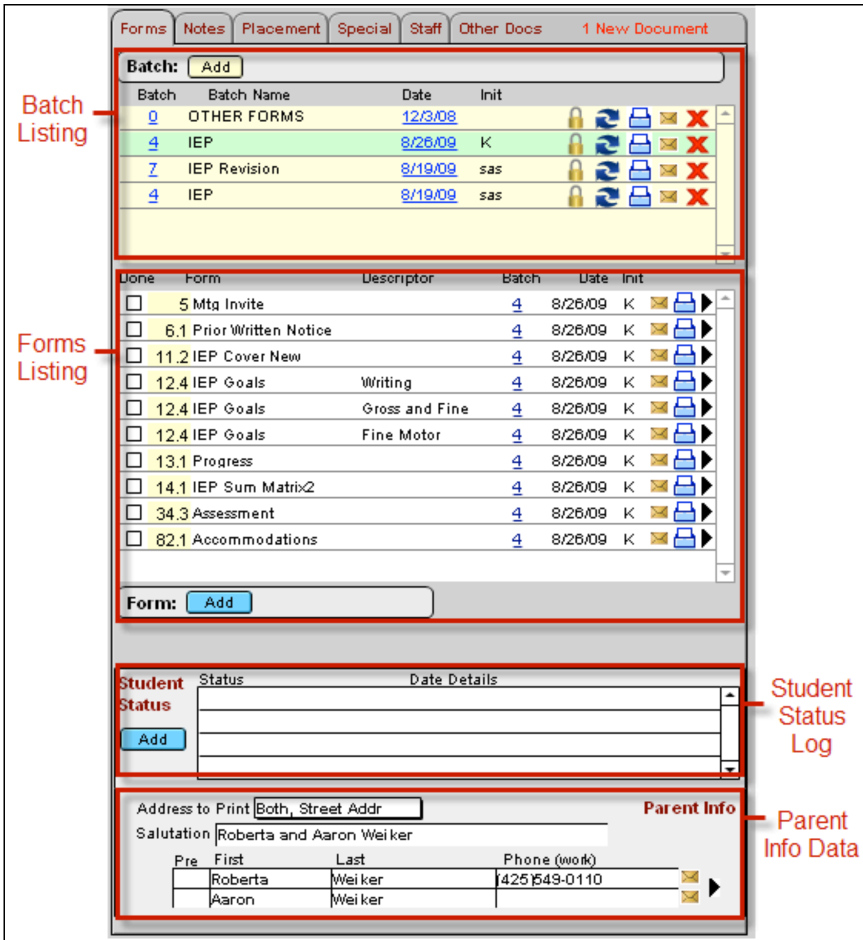
   The Delete box may only be used by Admin level users. Please see the Admin manual for more details.

Student Access Data



This section allows users to confirm when a student record was created or the last time it was modified. The same information can also be viewed from the **[*Special tab*]**.

Forms Tab



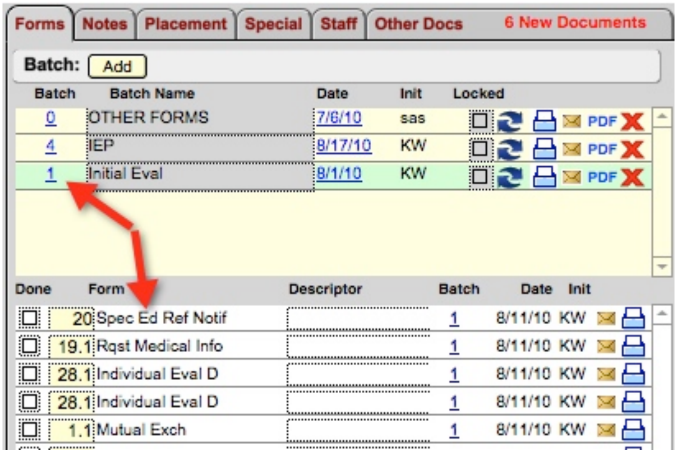
The ***Forms tab*** is divided into 4 sections:

From here, users are able to:

1) Manage a variety of actions associated to forms and batches.
2) View 'Student Status' details.
3) View, email and access 'Parent Info' data.

Batch and Forms Listings Overview

Forms can be added either as a batch or as individual forms. **Batches** are groups of individual forms pre-defined by your E-Com system administrators. **Individual forms** can be added at any time, either on their own or directly to an existing batch. Grouping forms into batches allows for faster navigation and better organization of commonly used forms. Typical batches in E-Com include *Initial Evaluation*, *Re-evaluation*, *IEP*, etc.



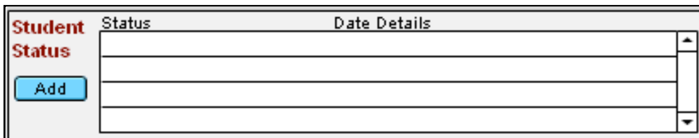
The ***Batch Listing*** displays all batches that have been added for a particular student.

Clicking on any batch number (as shown) highlights that batch row green and simultaneously displays all forms for the batch in the ***Forms Listing*** located directly under the ***Batch Listing***. Locked forms will appear with a red highlight around the "Done" checkbox. Locked forms may not be edited; if they are locked accidentally, they may only be unlocked by an administrator.

Any form added that is not associated with a particular batch will go into a batch named ***"OTHER FORMS"***.

Student Status Log

Below the Forms listing on the Forms tab, you will find the ***Student Status*** area.

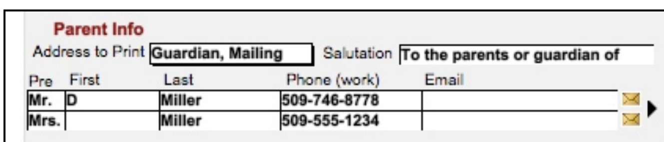


Depending on your district's policies, users may denote students' "special status" here (e.g., graduation, exit from special ed. program, ancillary student).

Note - Your district's system administrator is responsible for managing what data is available in the drop-down lists. Use of this section varies by district, so check with your Special Ed secretary for further instructions.

Parent Information

At the bottom of the Forms tab, you will find the ***Parent Info*** area. This section provides access to a small subset of fields within the ***Parent Data Entry Screen***.



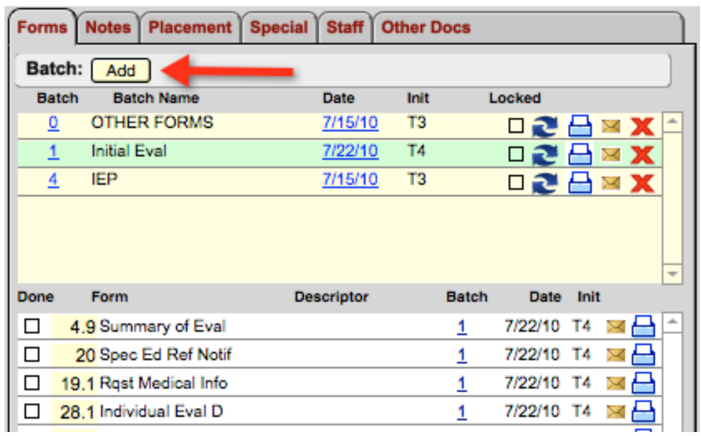
The '***Address to Print***' popup menu allows you to select which address will appear on envelopes printed for the student.

To view more detailed parent information, click on the black triangle located between both parents names to access the ***Parent Data Entry Screen***.

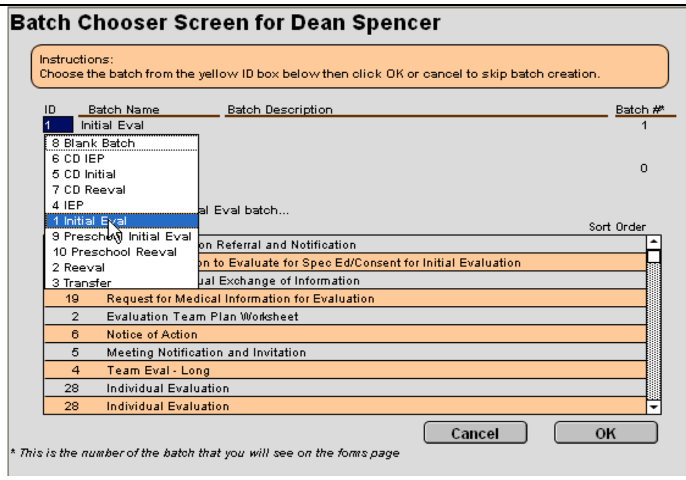
Using a Batch

From within the ***[Batch Listing](#)*** section you can easily add, lock, refresh, print, email or delete a batch.

Adding a Batch



From the Forms tab on the Student Screen, click the ***Add*** button to display the ***Batch Chooser screen***.

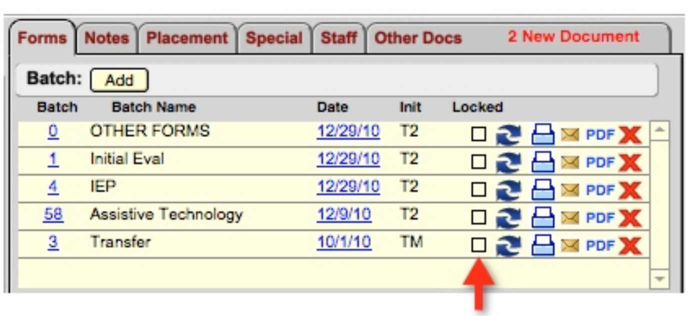


From the ***Batch Chooser screen***, select a batch from the list. The forms in the batch are listed in the rows displayed at the bottom of this screen.

**Note*: If the student already has an IEP or Eval batch within the 1 or 3 year time frame, when you add another, you will have to confirm the addition of that new batch.

* ***Note*** - Your district's system administrator is responsible for batch management. They decide which forms are listed within a batch, if multiple copies of the same form are needed, and the order in which the forms appear in the batch.

Locking a Batch



Once all the forms within a batch have been completed, the batch may be locked so that completed forms are not accidentally changed.

Clicking the ***Lock*** box locks all forms in that batch. Forms in locked batches may only be edited by Admin users. Be sure you intend to lock all forms in the batch before doing so. ***Unlocking*** can only be done on a form-by-form basis, by an Admin user.

Refreshing a Batch

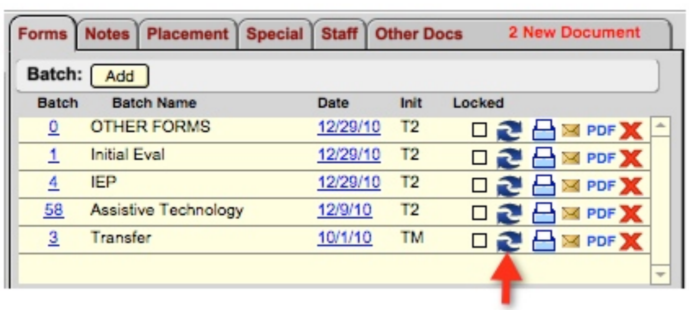
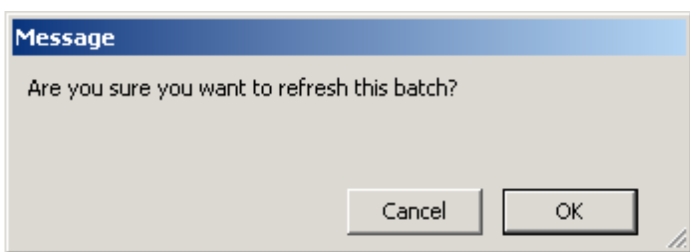
For any data management system, two types of data records can be created. Those records can either represent:

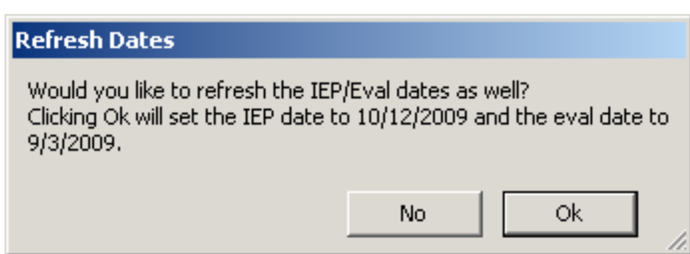
1) a snapshot in time - e.g., a student form;
2) its current state - e.g., student age, Case Manager, etc.

For processes that lapse over a very short period of time (e.g., ~2 minutes to create/print a meeting invitation) those two data records may contain the same information. However, for processes lapsing over a longer period of time (e.g., ~30 days to complete an IEP), the "current state" data may change.

In E-Com, certain student data fields, if available when a form is created, are copied to the appropriate form fields at that time*.* ***If that student information is later changed*** (for example: disabling condition, age, etc.) ***the data will be incorrect on the form***. You can use the refresh function to update this information.

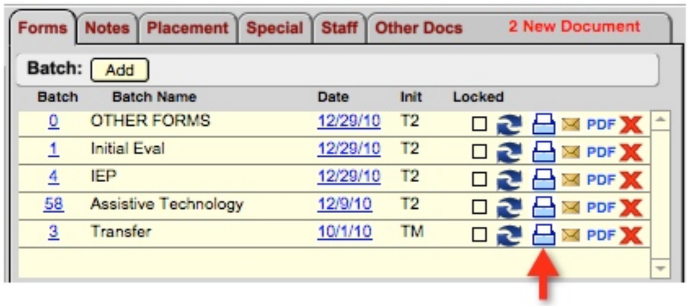
Note - **Exercise care when using this functionality.** Users can inadvertently change completed forms that are not locked or marked as completed (e.g., Eval forms from 3 yrs ago, last year's IEP, etc.) so ***be sure you have selected the intended batch before refreshing***. If forms inside the selected batch are marked as complete, or are locked, you will not be able to refresh the batch.

<table>
<tr>
<td>
</td>
<td>Click on the blue Refresh icon to refresh a batch.</td>
</tr>
<tr>
<td>


</td>
<td>Users will then see the following dialogs (shown to the left).

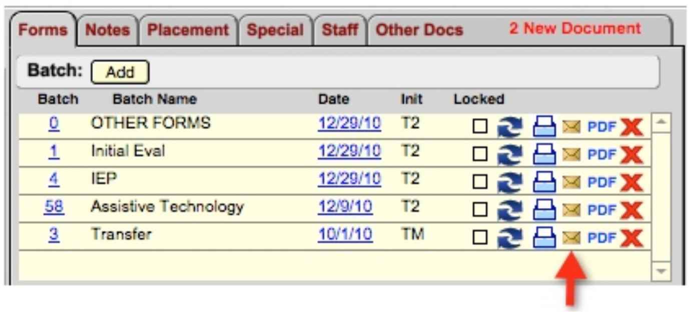
For districts with nightly imports, users should select "No" for "Refresh Dates" since the dates displayed on the Student Information Section are typically blank or incorrect in districts using imports.</td>
</tr>
</table>

Printing a Batch



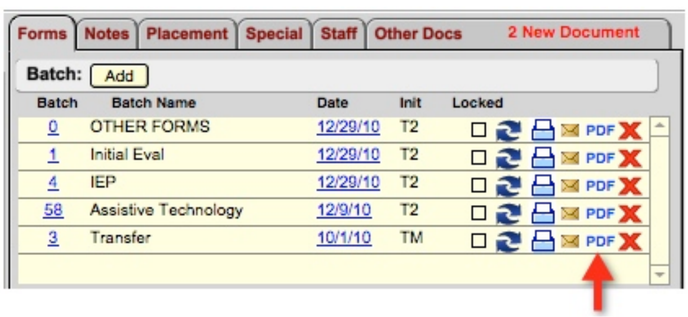
Click the blue printer icon to ***Print*** all forms in a batch.

Emailing a Batch



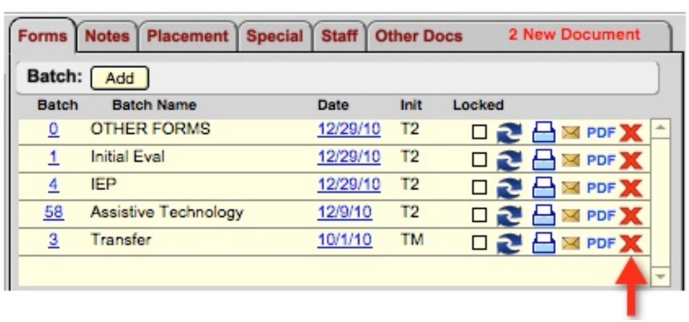
Click the ***Email*** icon to email all forms in the batch to any email recipient.

Creating a Batch PDF



Click the ***PDF*** icon to create a PDF of all forms in the batch. This PDF will be stored in your Documents folder by default.

Deleting a Batch



To delete a batch click on the Red **X** (the ***Delete*** button).

You can only delete batches that you created.
The Other Forms batch cannot be deleted.

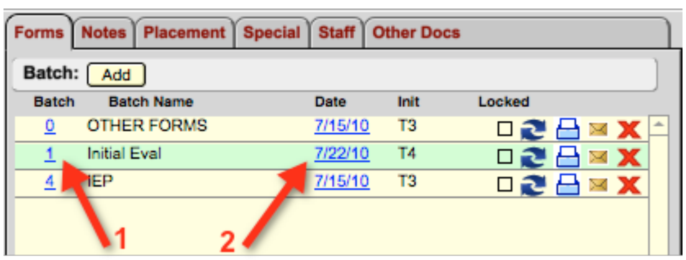
Additional Batch Functionality

IEP/Eval Batch Date Population

To clarify how IEP/Eval dates populate in IEP and Eval batches:

- When adding or duplicating an IEP Batch – Last IEP and Next IEP dates will be blank, evaluation dates will populate with what is on the student screen.
- When adding or duplicating an Eval Batch – all dates will be blank.
- When adding a form to any batch – dates will be set to the dates already used on other forms in the batch.
- When refreshing a form or batch – a prompt will display asking if the user wants to update the IEP and Eval Dates.

Editing Batch Date – Setting the IEP or Eval Dates for Forms in Batches

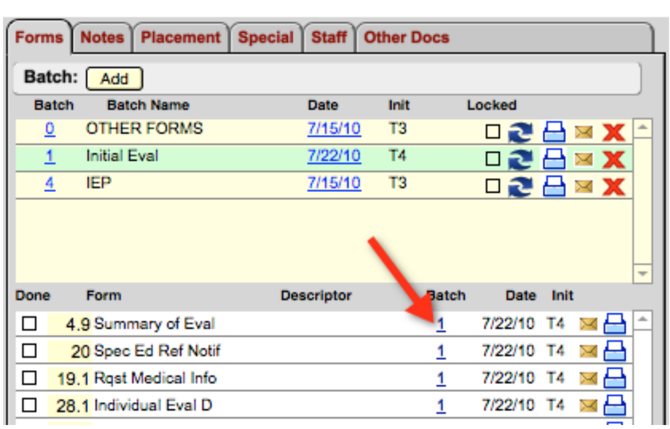


You can use this feature to set or reset the date for all forms in the batch.

1) Select the batch number for the batch you want to change. The batch selected will be highlighted light green.

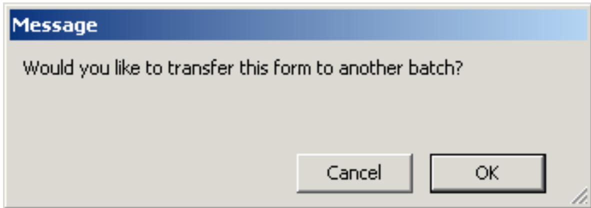
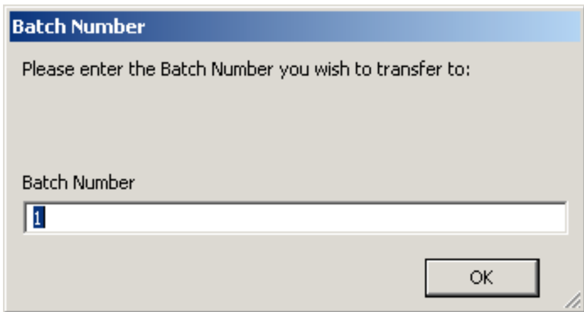
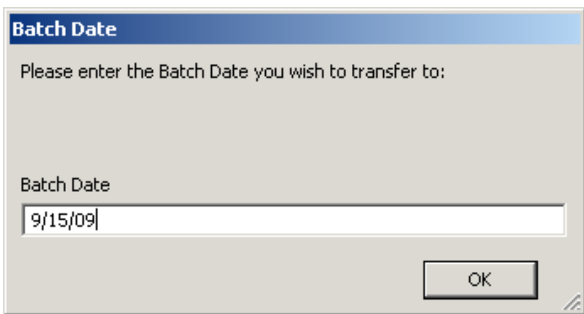
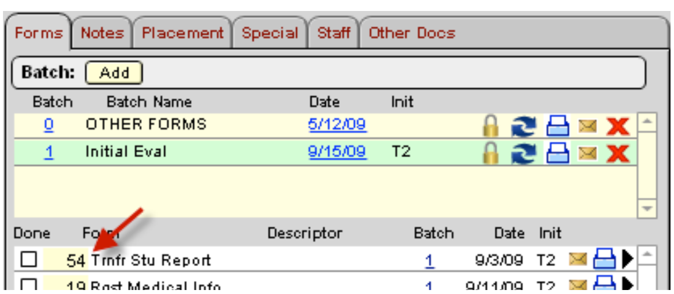
2) Click on the batch date field to update the IEP or Eval date for forms in the batch. This will only work for IEP or Eval batches, and will only update IEP or Eval date fields.

Moving Forms from One Batch to Another



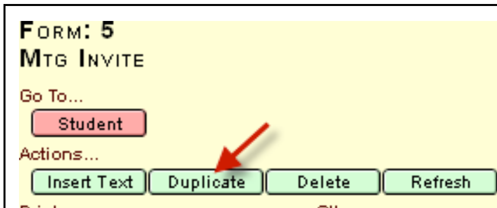
Click on the batch number in the ***Forms listing*** to move a form from one batch to another.

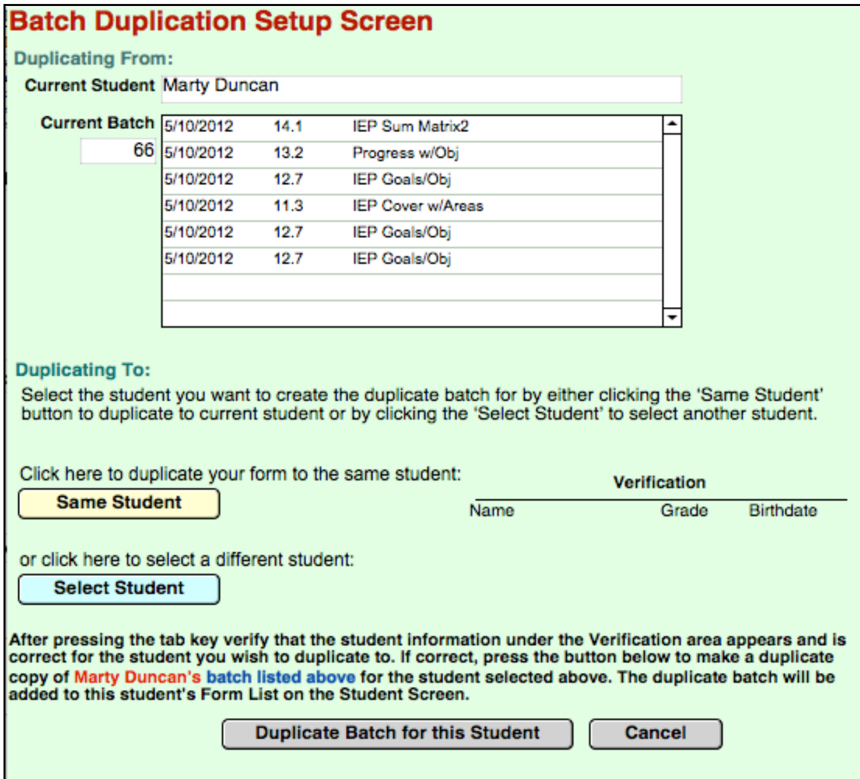
After clicking the number, users will see the series of dialogs shown below.

	First you will need to confirm that you intend to move a form.
	Then you will be asked for the batch number you wish to transfer to.
	Finally, users need to provide the batch date. There are times when students may have more than one copy of the same batch type (IEP, Eval, etc.). The date is needed to ensure that the form ends up in the intended batch.
	The form will then be shown at the top of the forms listing for the destination batch. ***Note** - Forms can only be moved between batches one at a time.

Duplicating a Batch

Users can save time by duplicating an entire batch. You can duplicate a batch to the same or to a different student. For example, you may duplicate last year's IEP batch for a student as a template for this year.

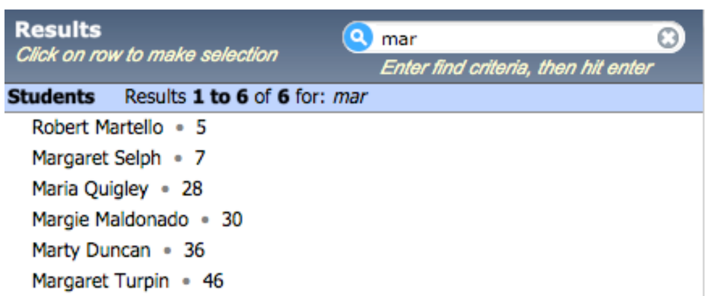
	Navigate to a form within the batch you want to duplicate. Click on the ***Duplicate*** button from the Form Navigation bar. A dialog will appear; select Batch to duplicate the entire batch to which the form belongs. This will open the ***Batch Duplication Setup Screen*** shown below.



This screen displays a list of the forms in the batch you are duplicating*. Select either the "Same Student" button or the "Select Student" button, depending on whether you want to duplicate the batch to this student or to a different one.

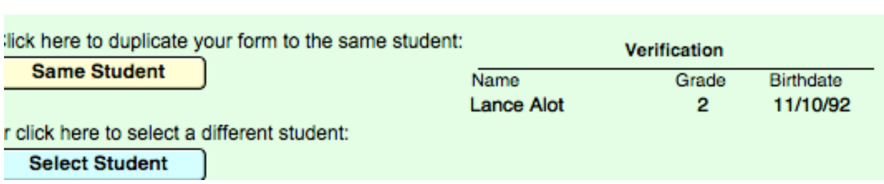
* ***Note***: Prior to showing the duplication screen, a warning will appear for any inactive forms contained within the batch being duplicated, informing the user that **inactive forms will not be duplicated.**

If you hit the "Select Student" button, you will get a search screen where you can enter a student name, in full or in part, to find the correct record.



You must enter at least 3 characters in the top line, next to the small blue magnifying glass. Select the student you want from the list of results by clicking on the student name. The student name, student number and SSID will be displayed. (You cannot search by SSID or student number.)

Only active students can have forms or batches duplicated to their records. Inactive students will not be found.



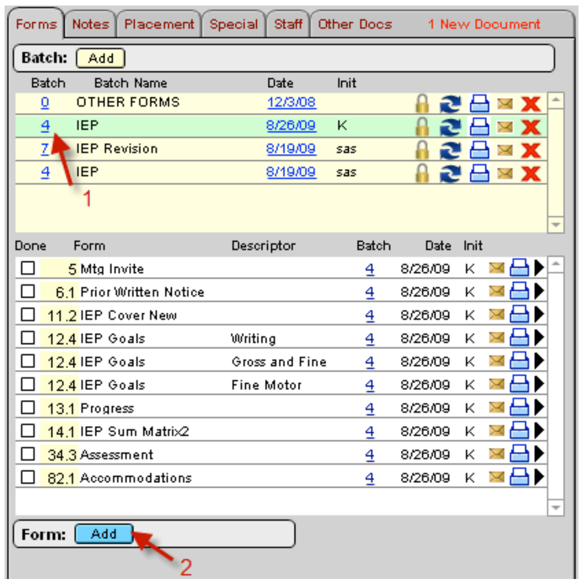
1) Verify that you have selected the correct student by checking the Verification data to the right.
2) To proceed, click Duplicate Batch for this Student button.

You will be brought to the ***Student Screen*** of the student where the new batch was just duplicated.

Using a Form

From within the ***Forms Listing*** section, you can easily add, email, print, or access individual forms.

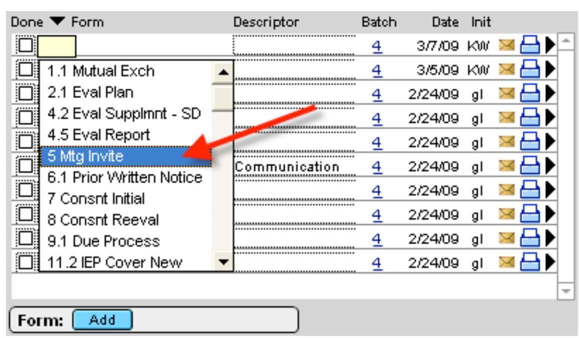
Adding a Form



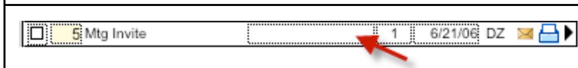
1) From the ***Batch listing***, click the batch number of the specific batch you want the form to be added to.

   If you don't want the form to be included with any particular batch, click on the "***Other Forms***" batch.

2) Click on the ***Add*** button below the ***Forms listings***. This generates a pop-up menu within the Forms listing area.



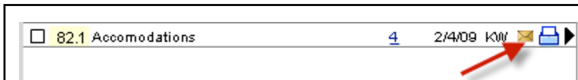
In the pop-up menu, use the mouse to click on the desired form. Use the scroll bar to see all the forms available in the menu.



Once selected, the row will automatically fill in.

In certain situations, it may be necessary to have multiple instances of the same form. Users can use the ***Descriptor*** field to include additional identifying information about such forms (e.g., individual area of service for each goal form).

Emailing a Form

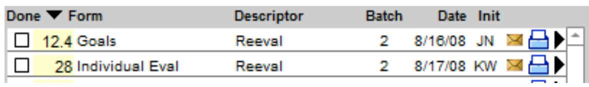
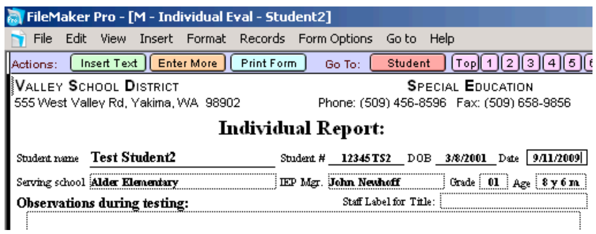


Click the ***Email*** icon to email the form to any email recipient.

Printing a Form

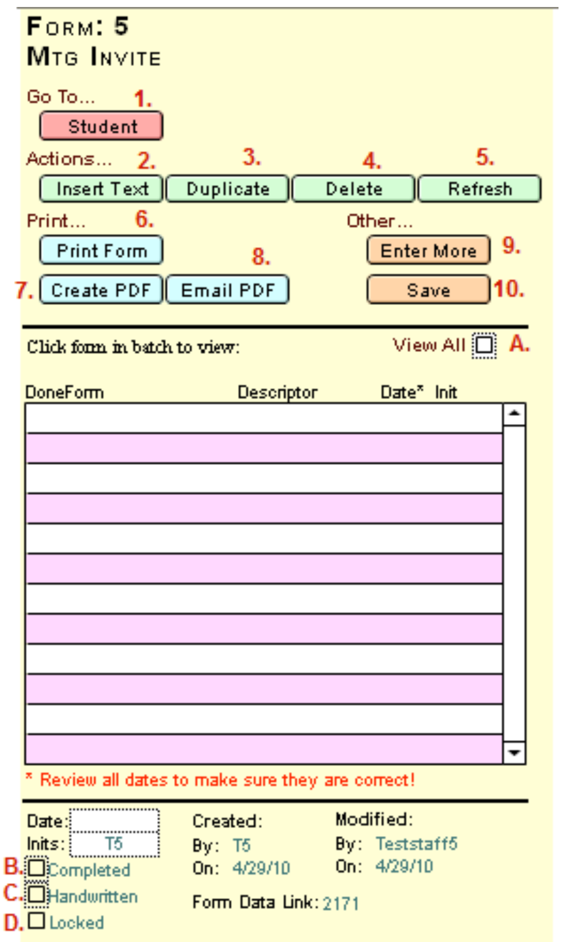
	Click the blue printer icon to ***Print*** the form in that row for the selected student. Users can also print a particular form via the ***Form Navigation Bar*** on a particular form.

Accessing an Individual Form

	Click on the form number, form name, or black triangle to access the desired form.
	Upon viewing the form, click the ***Tab*** key to navigate between fields on a form. Notice how the majority of the fields at the top of each form are already completed. Data available from the ***Student Entry Screen*** will be populated directly to the form when the form is added.

Form Navigation Bar

Once in a form you will see the ***Form Navigation Bar***, a yellow area to the right of every form. It contains creation and modification information as well as action buttons to help forms processing. In addition, on multi-page forms, there is a rolling header with most of the same buttons. Users can also use the forms listed to easily navigate between the student's forms.



The checkboxes are defined as follows:

A. **View All** - Check to access forms from ***any*** batch.

B. **Completed** - Check when the form is finished. This lets other members of the IEP or Eval team know that you are finished with this form.

C. ***Handwritten*** - A check here indicates the form was printed blank and handwritten instead of being completed in E-Com.

D. ***Locked*** - Checkbox can only be edited by E-Com Admins. Once locked, a form cannot be edited by anyone except admins.

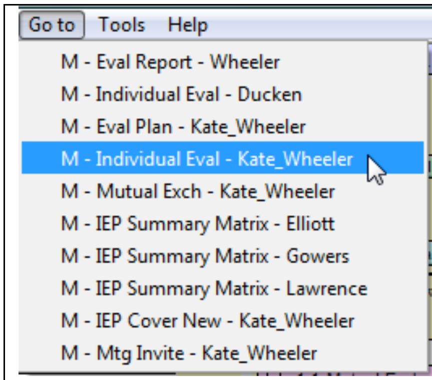
The button are defined as follows:

1) **Student** - Navigates to the Student Screen for the student last viewed. This **may not necessarily be the same student** whose form you are viewing and/or selecting the button from.
2) **Insert Text** - Allows users to insert pre-defined text See "***Using the Text Library***".
3) **Duplicate** - Duplicate forms or batches to a current or different student. See "***Duplicating a Form***" or "***Duplicating a Batch***."
4) **Delete** - Deletes the current form being viewed.
5) **Refresh** - Updates the form with the current student data. For more details on refreshing, see "***Refreshing a Batch***."
6) **Print Form** - Prints the form being viewed.
7) **Create PDF** - Generates a PDF document of the form to a location you specify.
8) **Email PDF** - Emails the form as an attached PDF.
9) **Enter More** - Allows users to enter more data than fits on any existing field by adding a text section to the bottom of the form.
10) **Save** - When spending a considerable time on a form, users can force a save. This helps prevent data loss in the event of a power failure or network disruption.

Note: *Data is automatically saved when you close a form, go to another screen, or exit E-Com. This feature simply provides extra protection.*

Additional Form Functionality

Viewing Forms Side By Side



You may view two forms side by side.

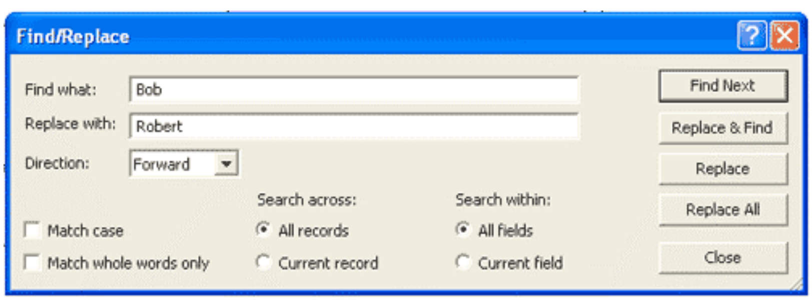
1. Navigate to the first of the two forms that you would like to see side by side.
2. Navigate to the second of your two forms.
3. From the 'Go To' menu, select the first form. It should be at the top of the list.

Your two forms will now be displayed side by side. Clicking on the Student button or leaving either form will close both forms. The 'Go To' menu maintains a list of the last ten forms you've accessed. You can view any two forms in the list side by side.

Find & Replace Text in a Form

The Find & Replace function can be very useful when correcting an error or updating data on a duplicated form. For example, if you have an evaluation where you have used 'Bob' for the student's name, but find that you want to change it to 'Robert', you can use the Find & Replace function to do this quickly and easily.

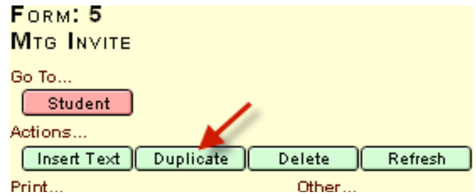
Another common example would be when a psychologist (or SLP, OT, PT, etc...) has an Individual Evaluation they have set up for a particular testing situation. If they duplicate that Eval to a new student, the Find & Replace function allows the specialist to quickly update the new form with the student's name.



To use Find & Replace, open the form that you'd like to work with and choose 'Find/Replace' from the Edit menu. This will display the dialog below. Simply enter your 'Find' and 'Replace' text and click the appropriate button on the right. Its as easy as that!

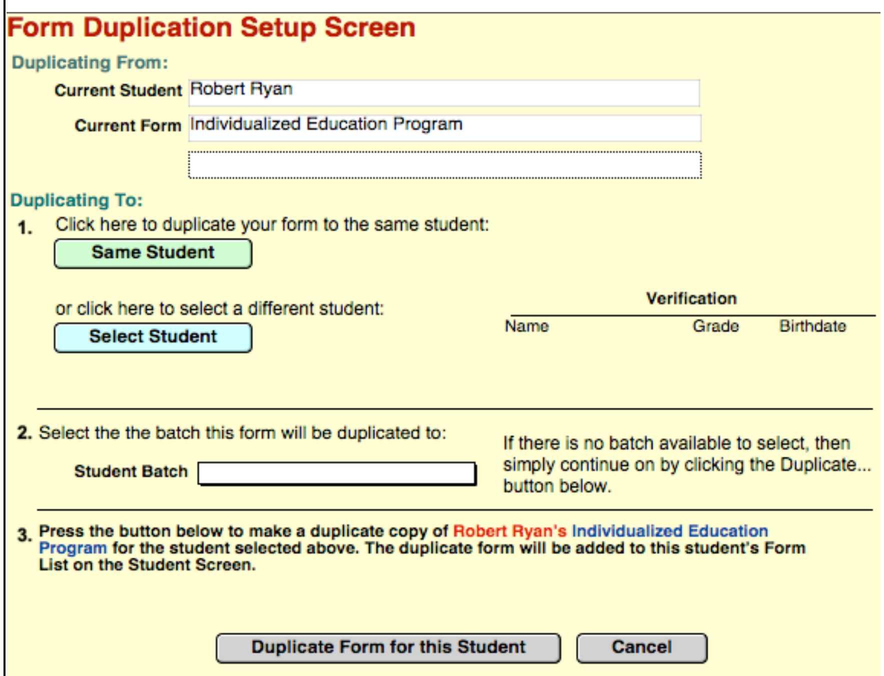
Duplicating a Form

Users can save time by duplicating forms for *any* given student, for example, by creating a duplicate of a goal form from last year's IEP in this year's IEP.



From within an individual form, click on the ***Duplicate*** button on the Form Navigation bar.

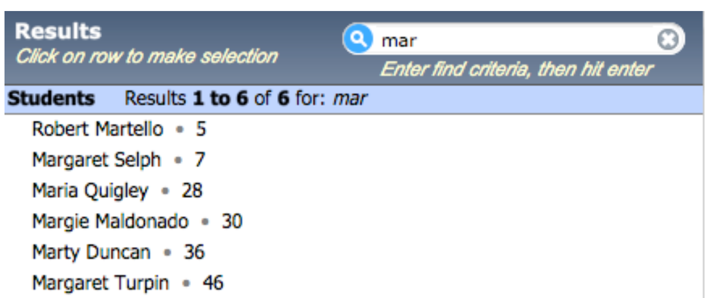
A dialog will appear; select Form to duplicate the form you are currently viewing. This will open the ***Form Duplication Screen*** shown below.



This screen displays the form being duplicated. Select either "Same Student" or "Select Student" to duplicate the form.

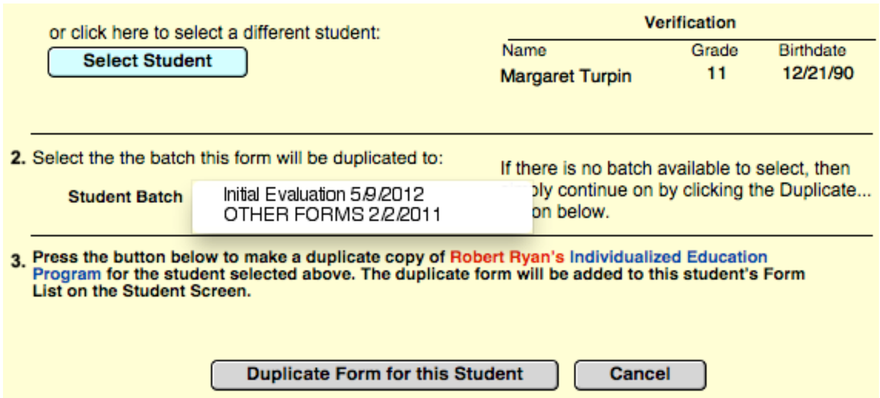
Note: A warning will appear if a user attempts to duplicate an inactive form. **Inactive forms will not be duplicated.**

If you choose the "Select Student" button, you will get a pop-up where you can enter a student name, in full or in part, to find the correct record.



You must enter at least 3 characters in the top line, next to the small blue magnifying glass. Select the student you want from the list of results by clicking on the student name. The student name, student number and SSID will be displayed. (You cannot search by SSID or student number.)

Note: Only active students can have forms or batches duplicated to their records. Inactive students will not be found.



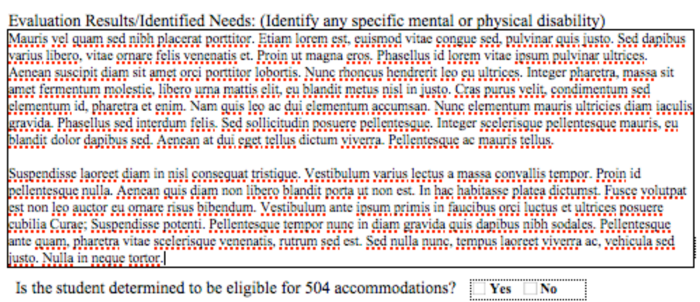
1) Verify that you have selected the correct student, by checking the Verification data to the right.

2) If the student you're duplicating to has multiple batches, you can select which batch you would like this form to go to from the popup menu.

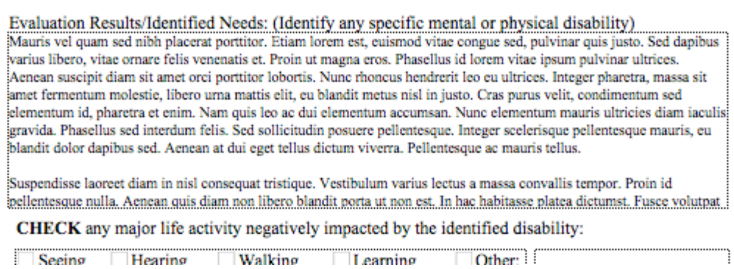
3) To proceed, click Duplicate Form for this Student. You will be brought to the ***Student Screen*** of the student where the form was duplicated.

Additional Information Field

Many of the forms in E-Com have an "additional information" field as the final page of the form. This is for use when you run out of room in a text field on that form. Text fields may *appear* to expand while you are typing, but if you overfill a field, text that is past the field's bottom margin will not print.

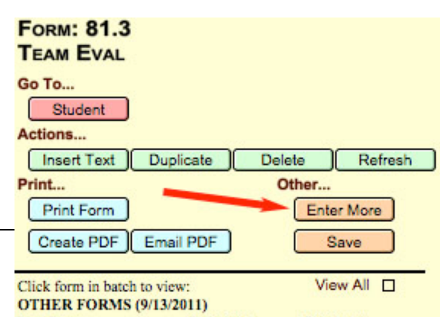


In the image to the left, the cursor is inside the text box, and you can see all of the text. However, the text box is overfilled. It overlaps the question directly below it.



When the cursor is no longer inside the text box, you can see how the page will appear when printed. Only the first two lines of the second paragraph will print.

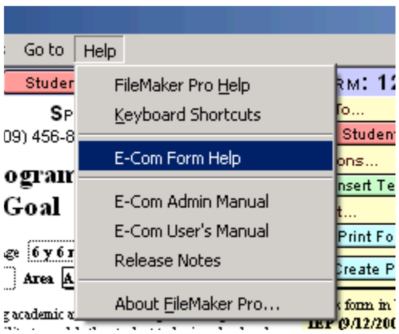
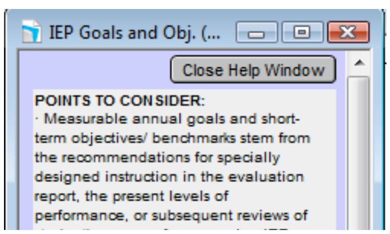
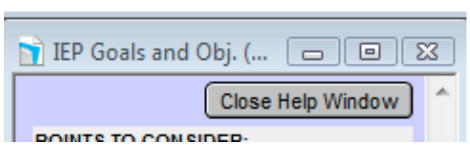
If you notice that you are close to the end of a field, or if you have gotten out of a text field and notice that not all of your text is visible (as in the table above), you can use the "Additional Information" field for the overflow.



Simply click on the “Enter More” button in the Form Navigation Bar and you will be brought automatically to the large “Additional Information” field at the bottom of the form. Here you may continue adding text; you may also cut and paste text from the field that has been overfilled.

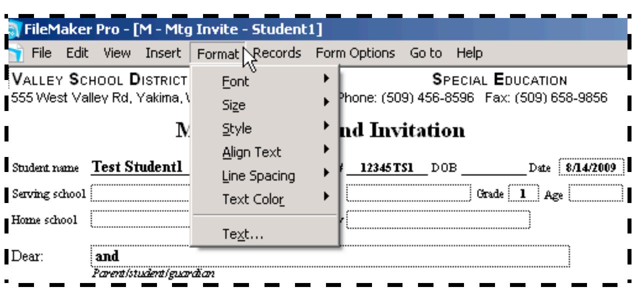
This preserves the pagination of the form itself while allowing additional information to be added. Once text has been entered in this field, it will print out at the end of the other form pages. The name of the student is automatically added, so the additional page(s) are always identifiable.

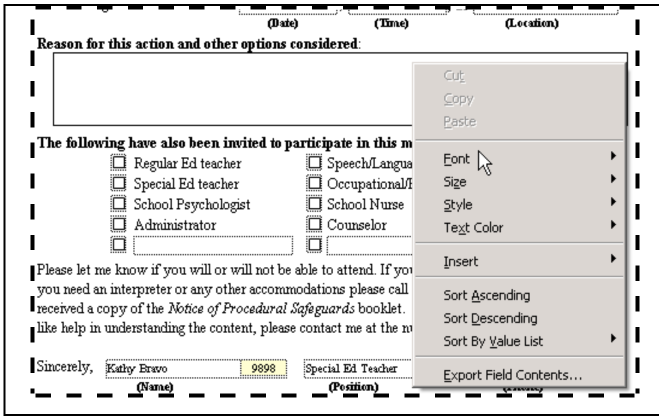
Using Form Help

	Assistance and tips for completing any form can be accessed from the form itself. The help available is based on the information entered by your E-Com Administrators. From the Help Menu, select E-Com Form Help.
	The form help window will pop up on the right hand side of the screen, displaying help text.
	To close the Help Window and continue editing the form, click the button ***Close Help Window*** at the top of the Help Window screen.

Formatting Text on Forms

Enter text by simply typing in the fields on the form.

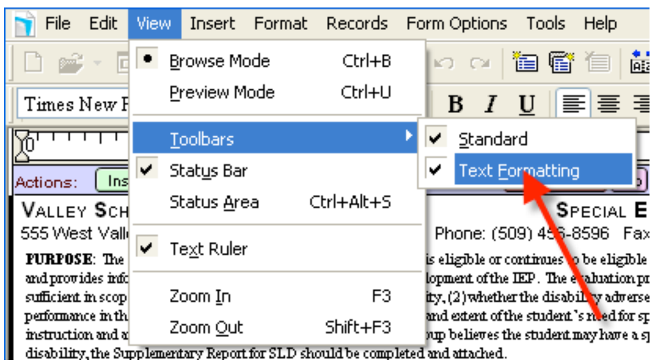
	You can format the text in a variety of ways -- change font size or style, alter the justification (left, right, center), and use tabs* to help line up columns of numbers. Users can either access the Format menu or right-click on any text field to change these preferences (as shown respectively to the left). * ***Note:*** Clicking the tab key in E-Com takes you from field to field on



the forms. To get a Tab character, type Control-Tab (Option –Tab on a Macintosh). See "[***Using the Text Ruler***]" to further fine tune tab alignment.

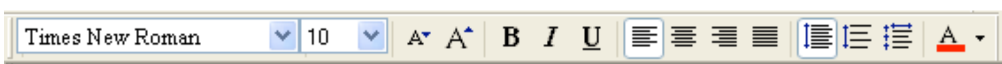
Displaying the Formatting Toolbar

In addition to the methods described above, for ease of changing fonts and styles, the formatting toolbar can be displayed.



To display the toolbar, simply select 'Text Formatting' from the 'Toolbars' submenu in the 'View' menu as shown on the left.

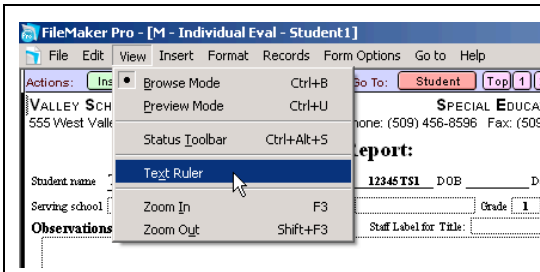
Users will then see the toolbar displayed as shown below



Using the Text Ruler

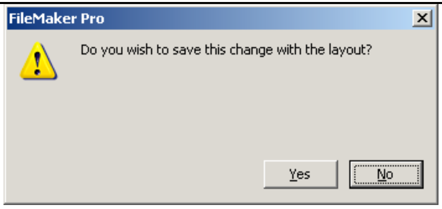
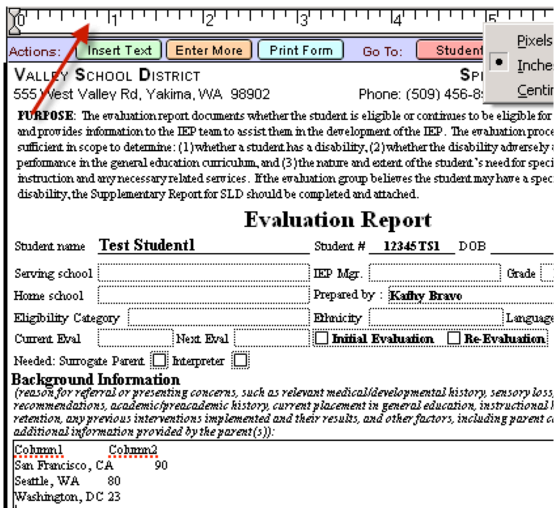
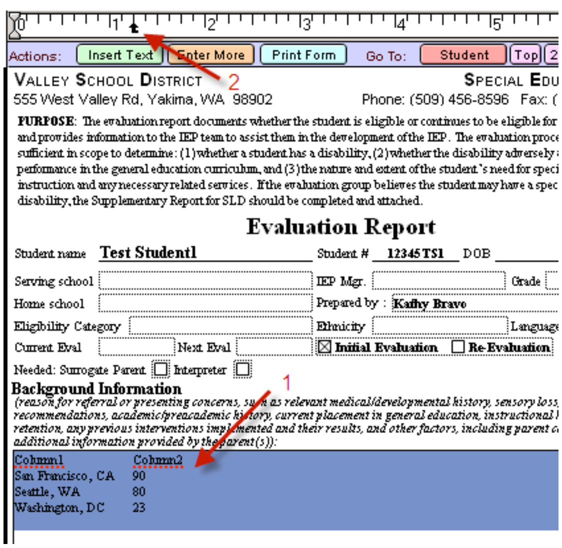
As noted in the "Entering Text on Forms" section, you can use tab* characters to line up columns in the data entry areas in E-Com. However, the default tab stops in E-Com do not always work well for a given set of columns. The solution is to use the Text Ruler.

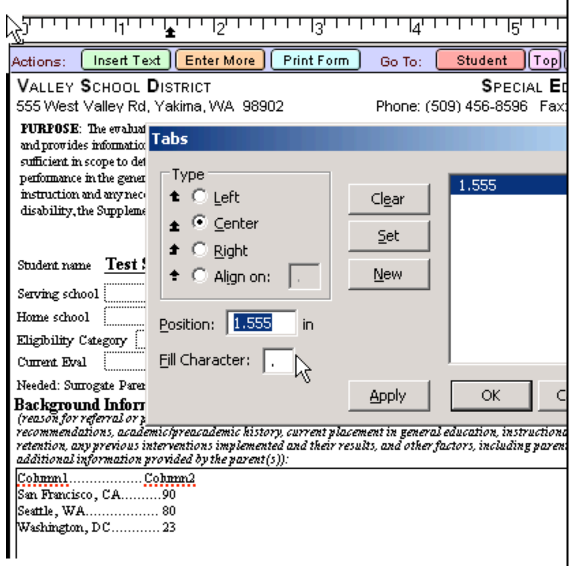
*** *Note:*** Clicking the tab key in E-Com takes you from field to field on the forms. To get a Tab character, type Control-Tab (Option -Tab on a Macintosh).



Once on the forms screen, select 'Text Ruler' from the 'View' menu.

This will display the dialog seen on the left. If you want the ruler to be available each time you access the form, click 'Yes,' otherwise click 'No'.

	
	The text ruler should now be displayed as shown. Note: The text ruler can be set to display in pixels, inches or centimeters. Your numbering will show as displayed if using the "inches" setting. To change this, right click on the ruler and to your desired setting.
	If your cursor is in a text field, you will be able to edit tabs for the text ruler. To do so: 1) Select the text for which you would like to modify the tab stops. 2) Click on the text ruler where you want the tab stop to be. To fine tune placement of the tab, drag the tab stop to the desired location.



Double clicking on the tab stop displays the 'Tabs' dialog (left). You may change other tab formatting here. Be sure to highlight the desired text before double clicking.

Tab type suggestions: Center for column headings, left for text in columns, and right for numbers with no decimal points. The 'Align On' option allows a column of numbers with decimals to line up on the decimal point.

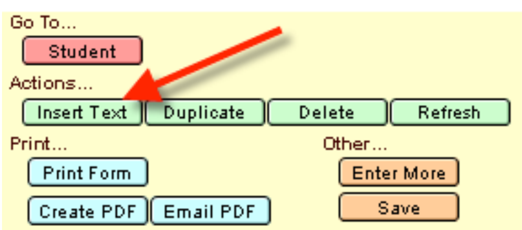
Fill Character option: You can fill the tab spacing with a character. For example, in the image left, the tab for column 2 has been changed to center justified and the tab space has been filled with periods.

Using the Text Library

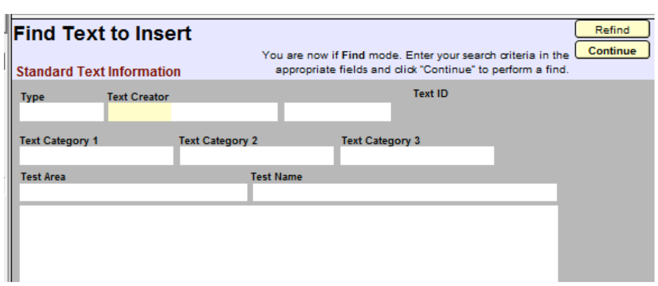
E-Com is built with a table of pre-defined blocks of text called ***Text Libraries***. They ease entry of frequently needed text blocks and can be inserted into any field on any form.

All forms have an '***Insert Text***' button on the ***Form Navigation Bar*** that can be used to copy any block of text from the library into your form. Other specialized libraries are also available via specific form buttons, including: 'Set Goal', 'Insert Test', and 'Insert EARL/GLE'.

All ***Text Library*** entries can be edited by your E-Com system administrators and new library entries can easily be added.

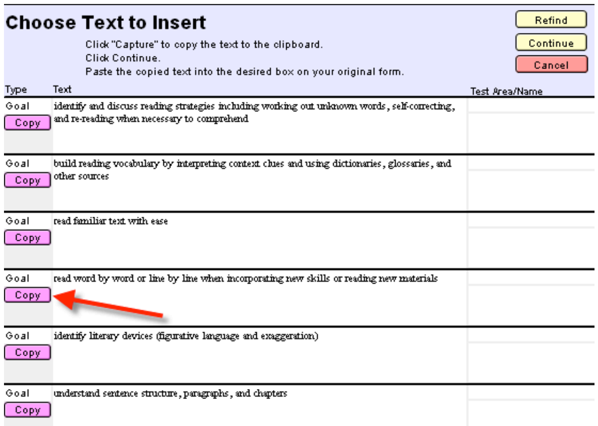


To insert an entry from the text library into your form, click the ***Insert Text*** button from the ***Form Navigation Bar***.



This screen will be displayed, allowing you to enter your search criteria.

Click the ***Continue*** button when you are finished entering search criteria.



A list of matching text library entries will be displayed.

Click the ***Copy*** button next to the desired text entry. The text will be copied to the clipboard and you will be returned to your original form.

Make sure the cursor is in the field where you want the text inserted and choose 'Paste' from the edit menu or use the keyboard shortcut Ctrl-V.

Your selected text will be pasted into the field.

Features for Special Forms

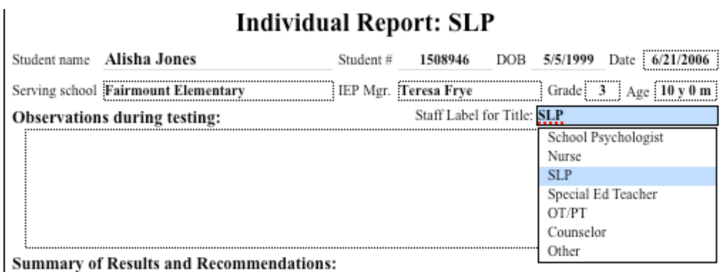
Users can take advantage of customized actions on certain forms. This section reviews some commonly used specialized form features.

Individual Report - Form #28

The special features added to this form are '***Staff Label for Title***', insert '***EALR/GLE***', '***Guidance for IEP'***, and '***Insert Test***'

Staff Label for Title

More than one staff member will likely complete an Individual Evaluation report for any given student. Users can set this label to easily identify which type of staff member has completed the given form. Selecting a label changes the descriptor field (on the ***Forms Listing*** view) in addition to modifying the title within the form to the selected staff title.

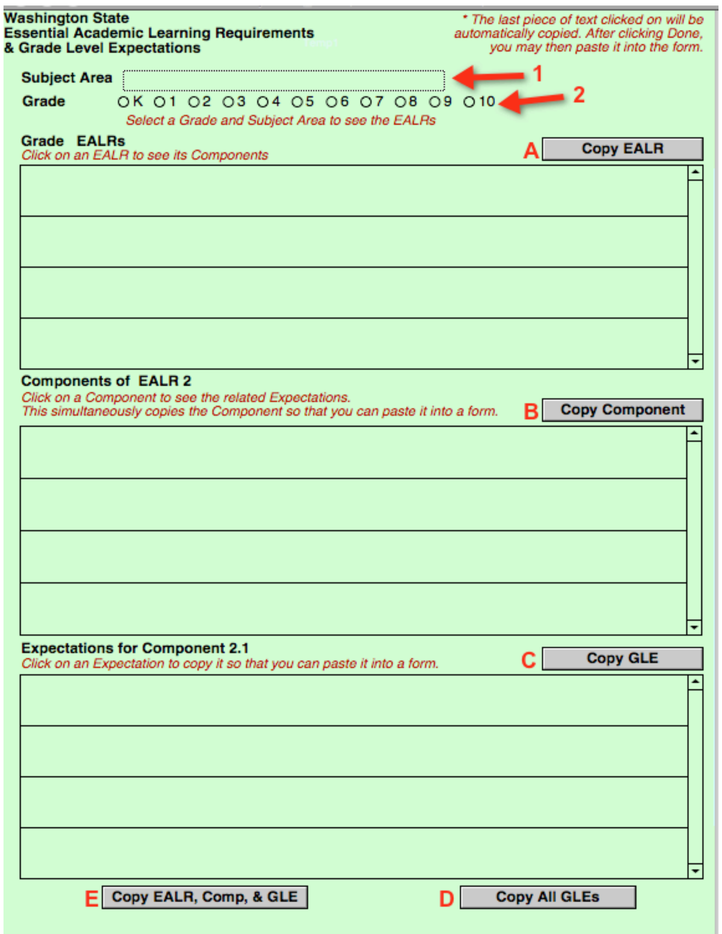


This field does not print, but allows the user to select the title for the form. In this case, SLP was chosen. Other options include OT/PT, Nurse, etc.

'EALR/GLE' button

E-Com stores EALR/GLE's as one type of specialized ***Text Library***. This feature is also available for the Evaluation Report (#4.5) and the IEP Cover (#11.2) forms.

To insert EALRs (Essential Academic Learning Requirements) or GLEs (Grade Level Expectations) into your form, click the ***EALR/GLE*** button.



The screen shown will be displayed.

1) Select ***Subject Area*** from the drop down list.

2) Select ***Grade***.

The EALRs, Components, and GLEs will change depending on the two criteria selected.

Click on the text you wish to insert in any of the three areas.

A. ***Copy EALR*** copies just the EALR selected.

B. ***Copy Component*** copies just the Component selected.

C. ***Copy GLE*** copies just the GLE selected.

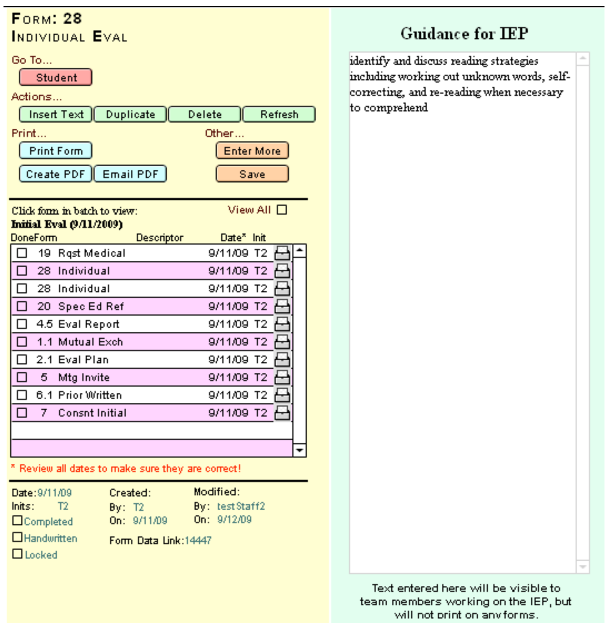
D. ***Copy All GLEs*** copies all GLE selections.

E. ***Copy EALR, Comp & GLE*** copies selections in all three areas

Once you copy, you will go back to the originating form, where you can paste the selected text where appropriate.

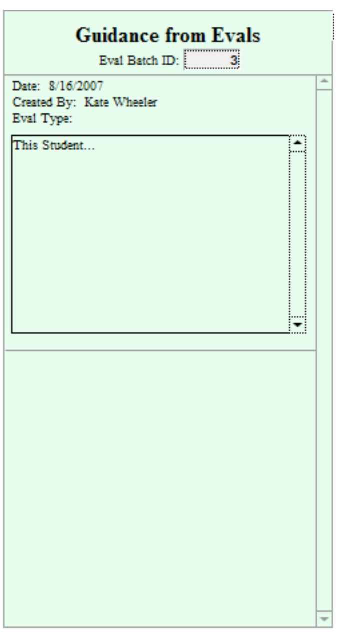
Guidance for IEP

The Guidance for IEP feature allows the person completing the *Individual Evaluation* form (#28) to create notes that will not print and are only visible to the users completing an *IEP Measurable Annual Goal* (#12.4) form.



Individual Eval Form

The right hand side of this form is where the text box for the Guidance for IEP is located. Simply type or copy & paste notes directly into the box.

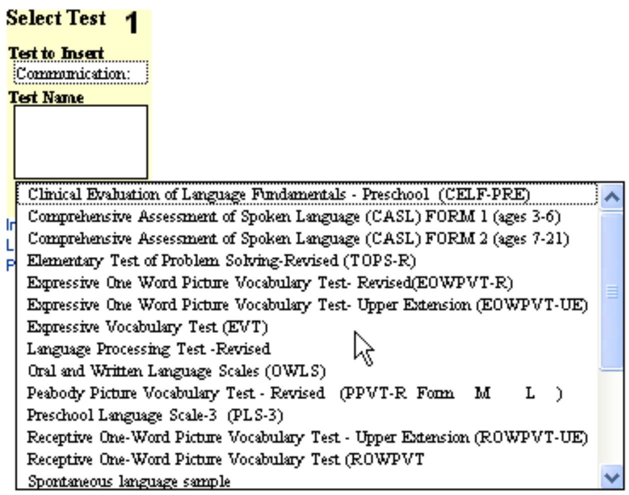


IEP Measurable Annual Goal Form

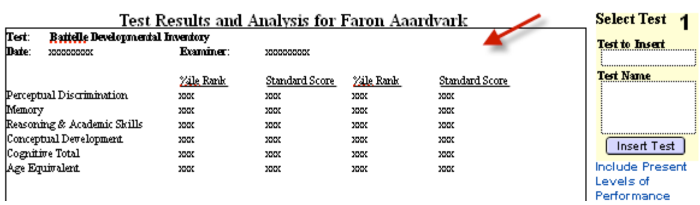
Notes entered into form 28 as above will appear on the right-hand side of form 12.4, along with the date and person who created the notes. The **Eval Batch ID** (box under the "Guidance from Evals" title) is the link between the Eval forms and the Goals and Objectives forms. This should auto-complete, but if the notes are not appearing, simply type the batch number of the Eval Batch that contains the Individual Evaluation you wish to have appear into the Guidance from Eval box.

Insert Test button

On the right side of the Individual Eval (28) form, under the Forms Navigation bar, you will find a series of Insert Test buttons. From here you can insert pre-formatted test results grids from the ***Text Library***. This will simplify entry of the test results for the specific student.



Select the testing area followed by the test name from the pop up lists provided then click the ***Insert Test*** button.



The pre-formatted text block will be inserted into the form.

The text can be edited as desired, including changing font sizes or other styling. See ***Formatting Text on Forms*** for more information.

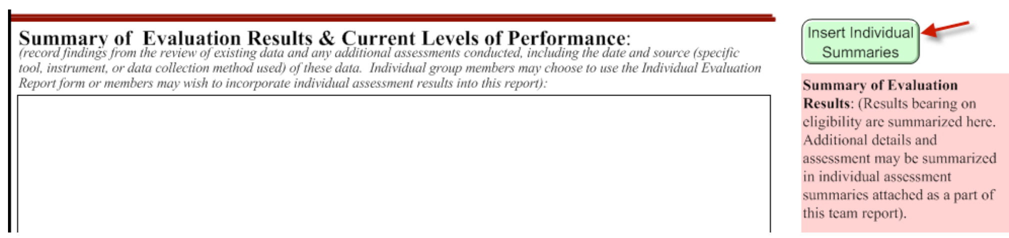
To line up the columns of numbers, the best option is to use tabs*.

** Note:* Clicking the tab key in E-Com takes you from field to field on the forms. To get a Tab character, type Control-Tab (Option –Tab on a Macintosh). See “***Using the Text Ruler***” to further fine tune tab alignment.

Evaluation Report - Form #4.5

Insert Individual Summaries

The ***Individual Summaries*** allows users to insert all individual summaries into the Team Summary form.

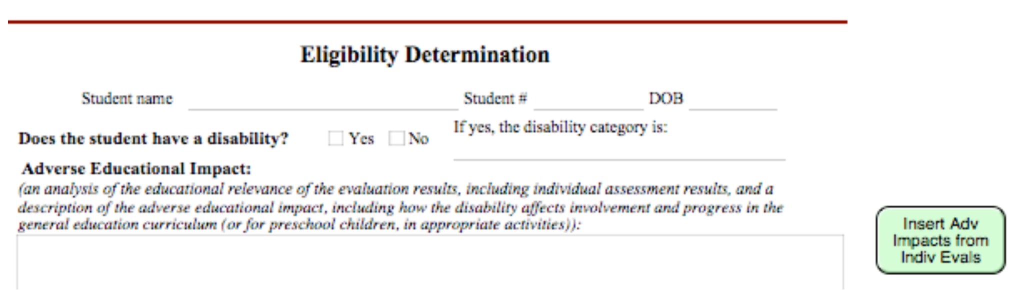


From the Evaluation Report form, click on the Insert ***Individual Summaries*** button.

This will paste all Individual Summaries with the title of the person who created them at the top.

Insert Adverse Impacts from Individual Evaluations

This button allows users to insert all adverse impact summaries into the Team Summary form.



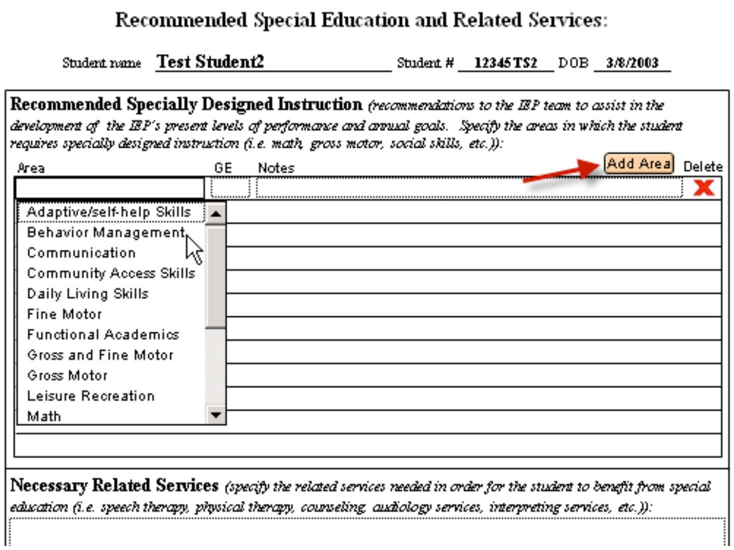
From the Evaluation Report form, click on the ***Insert Adv Impacts from Indiv Evals*** button.

This will paste the adverse impacts from all associated individual evaluations for this student.

Area of Service Compliance

The Area of Service Compliance functionality on this form allows users to dynamically set the Areas of Services in multiple screens throughout E-Com.

Completing this section of the form electronically allows users to monitor the current Areas of Service assigned to the student and complete *Goals and Objectives* forms with the appropriate areas of service.



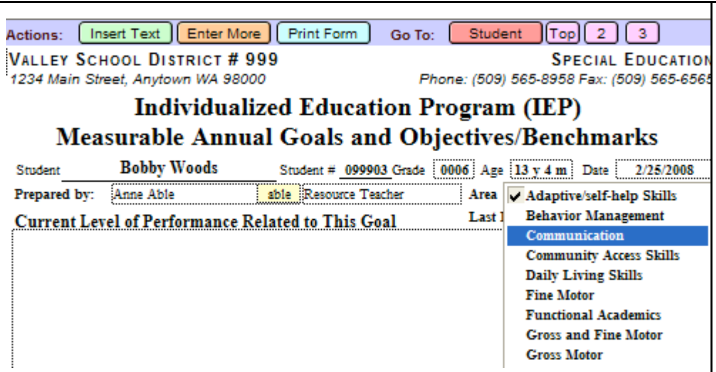
On page 4 of the *Evaluation Report* you will find the *Recommended Special Education and Related Services* section. Click Add Area to add each Area of Service defined.

Areas of Service added here will automatically be populated to the ***Placement tab*** and the ***Student Information section*** of the Student Screen if the form 4.5 they are added to is the ***most recent*** 4.5 form in the student's record.

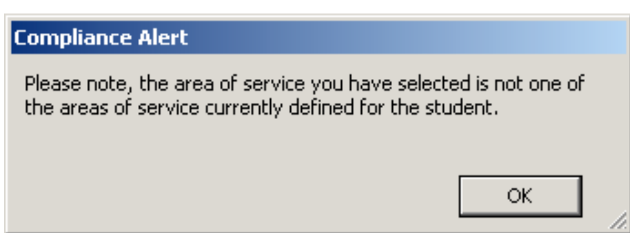
If other Areas of Service have been added manually using the Placement tab on the Student screen, they will be saved and removed automatically when a batch containing form 4.5 is added to the student. If this form or batch is removed, these Areas of Service will return.

IEP Measurable Annual Goal - Form #12.4; 12.7

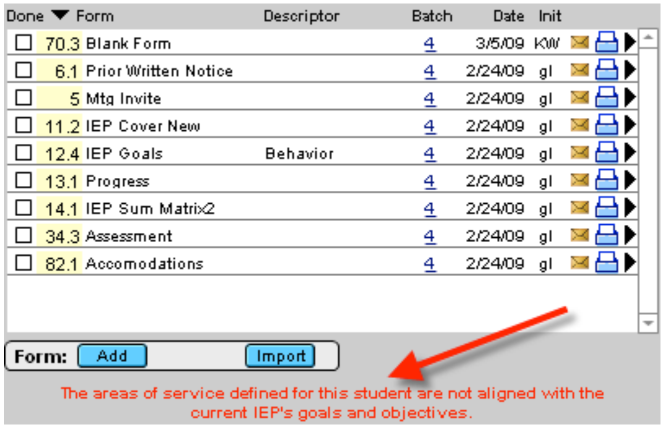
Area of Service Compliance



The ***Area*** drop down box allows users to choose one of the appropriate areas of service assigned to the student (there will be one goal form for each Area of Service defined).



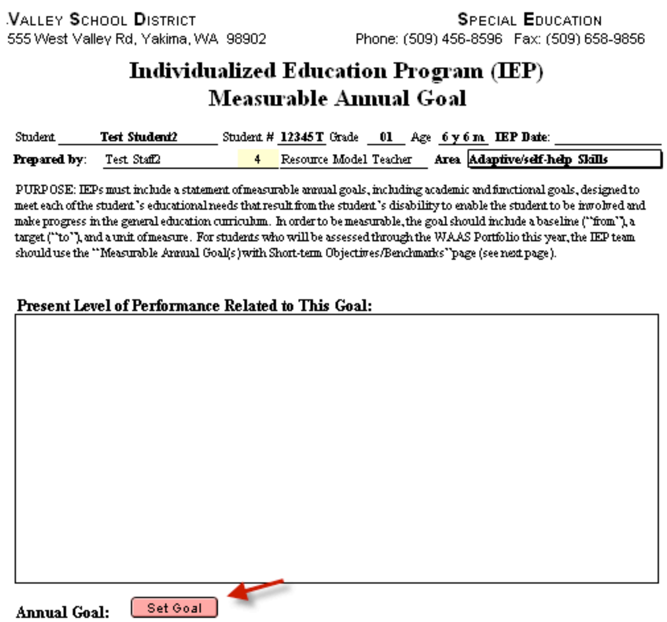
If you select an area that was not identified during the evaluation process (i.e., the area was not added either via the *Evaluation Form* or directly through the ***Placement tab***), the error shown at right will be displayed.



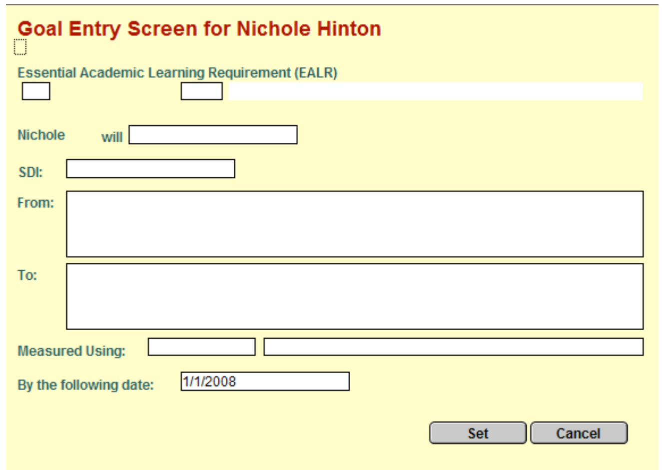
An alert will also appear on the ***Forms tab*** (under the Forms Listing section) if the Areas of Service on the IEP goal forms and/or the ***Placement tab*** do not match the areas of service called for by the evaluation.

Set Goal Button

To facilitate the ease of writing goals, E-Com can store goals text as one type of specialized ***Text Library*** entry.



To insert specific goal text from the ***Text Library***, click the ***Set Goal*** button on the goals and objectives form.



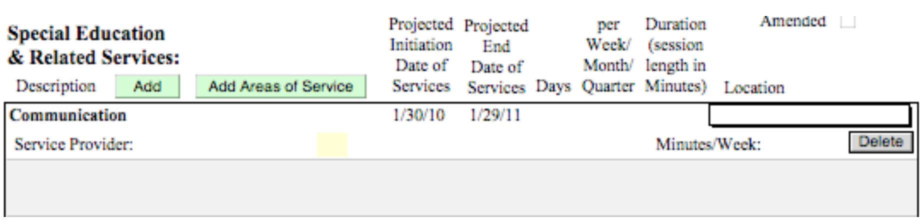
The screen at left will be displayed, allowing you to select the subject area and specific goal you would like to insert. Click the ***Set*** button to insert the selected goal into the Annual Goal field on your form.

Goals set on form 12.4 or 12.7 (but ***not*** form 12), if your district uses that, will appear automatically on forms 13.1 (or 13.2 or 13.3, depending on which your district uses) if the IEP dates and Student ID numbers on both forms match.

Summary of Services Matrix - Form #14.1

Add Areas of Service Button

When this button is clicked, any areas of services previously assigned to the student will appear, along with their initiation and end dates. Service provider, details of the service schedule, and the location need to be completed by the person filling out the form.



Minutes per week (under the Location field) will auto-calculate.

Then, to calculate percentage of time spent in a general education setting, fill in the "Total building instruction minutes per week (excluding lunch time)" field at the bottom of the first page, if it is not already entered.

1800 = Total building instructional minutes per week (excluding lunch time)
= Total minutes per week student is served in a special education setting (as of the IEP Date)
100 = % of time spent in general education setting

Then, depending on the E-Com version your district has, there are two different ways the two fields after the "Total building minutes" field auto-calculate.

1. If your version of the 14.1 form says "as of the IEP date" at the end of the middle line near the bottom of the first page (see above), the calculation will include all services that are current as of the IEP date on the form. If a service's initial date is after the

IEP date, or its end date is before the IEP date, that service will ***not*** be included in the calculation on the summary matrix form.

1800 = Total building instructional minutes per week (excluding lunch time)
= Total minutes per week student is served in a special education setting - as of
100 = % of time spent in general education setting

2. If your version of the 14.1 has a small calendar icon at the end of the middle line (see above), you need to select a date for the calculation to use as an “as of” date. Do so by clicking on the calendar icon and choosing a date that way, or by clicking in the space in front of the icon, and manually entering the date in dd/mm/yy format.

Services listed on the ***most recent*** Summary of Services Matrix form will also be auto-calculated and appear on the Student screen, Special tab, if you set the LRE code, found at the bottom of page 2 (see below). The calculation on the Student Special tab will be as of the current day’s date.

0-2 LRE Setting

3-5 LRE Setting
A Regular Early Childhood (REC) program means a program outside the child’s home that includes at least 50% children without disabilities. Please select one of the three choices below, and modify it further with the appropriate Setting drop-down list.

○ REC program ≥ 10 hours/week Setting:
○ REC program < 10 hours/week
○ Non-REC Program Setting:

6-21 LRE Setting

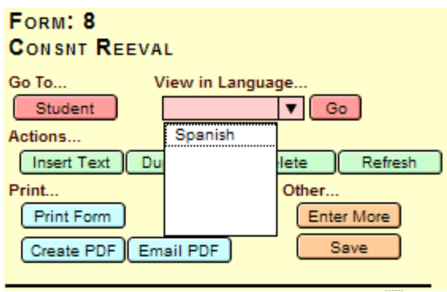
In addition, services assigned to staff members on Summary of Services Matrix forms will appear on that staff’s Service Roster report, available either from the Reports list (all staff), or from the Reports menu item “My Service Roster” available on the Staff screen (for the individual staff member).

Spanish Language Forms

Currently, the following forms are available in Spanish as well as English:

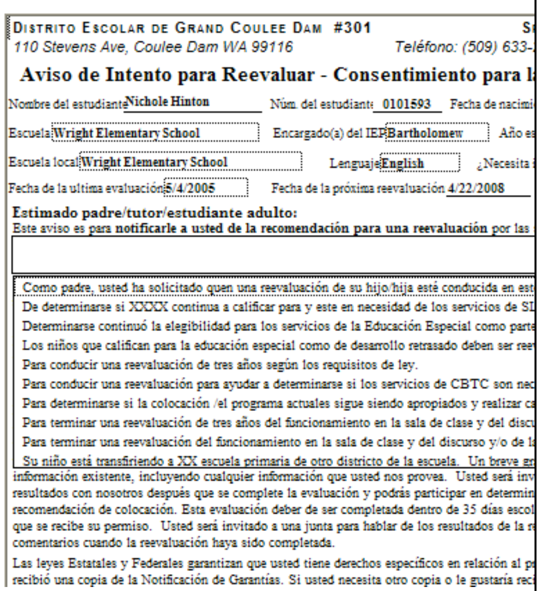
- Prior Written Notice (6.2),
- Initial Consent (7),
- Notice of Intent to Re-evaluate (8),
- Invitation to Attend a Meeting (7.4.1),
- Parent Consent (75),
- Medicaid Eligibility Verification (78) and
- Consent to Bill for School-Based Medicaid Reimbursement (79).

Note - Text entered in one language will not be translated to the other as you switch between them.



To access the Spanish Language form, simply select ***Spanish*** from the drop down list on the ***Form Navigation Bar*** of these particular forms.

Then click ***Go.***



DISTRITO ESCOLAR DE GRAND COULEE DAM #301
110 Stevens Ave, Coulee Dam WA 99116 Teléfono: (509) 633-

Aviso de Intento para Reevaluar - Consentimiento para l

Nombre del estudiante Nichole Hinton Núm. del estudiant 0101593 Fecha de nacimi

Escuela Wright Elementary School Encargado(a) del IEP Bartholomew Año es

Escuela local Wright Elementary School Lenguaje English ¿Necesita

Fecha de la ultima evaluación 5/4/2005 Fecha de la próxima reevaluación 4/22/2008

Estimado padre/tutor/estudiante adulto:
Este aviso es para **notificarle a usted de la recomendación para una reevaluación** por las

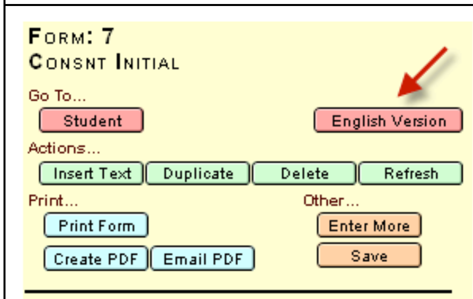
Como padre, usted ha solicitado quen una reevaluación de su hijo/hija esté conducida en est
De determinarse si XXXX continua a calificar para y este en necesidad de los servicios de SL
Determinarse continuó la elegibilidad para los servicios de la Educación Especial como parte
Los niños que califican para la educación especial como de desarrollo retrasado deben ser ree
Para conducir una reevaluación de tres años según los requisitos de ley.
Para conducir una reevaluación para ayudar a determinarse si los servicios de CBTC son nec
Para determinarse si la colocación /el programa actuales sigue siendo apropiados y realizar ca
Para terminar una reevaluación de tres años del funcionamiento en la sala de clase y del disc
Para terminar una reevaluación del funcionamiento en la sala de clase y del discurso y/o de l
Su niño está transfiriendo a XX escuela primaria de otro districto de la escuela. Un breve g
información existente, incluyendo cualquier información que usted nos provea. Usted será inv
resultados con nosotros después que se complete la evaluación y podrás participar en determin
recomendación de colocación. Esta evaluación deber de ser completada dentro de 35 días escol
que se recibe su permiso. Usted será invitado a una junta para hablar de los resultados de la r
comentarios cuando la reevaluación haya sido completada.

Las leyes Estatales y Federales garantizan que usted tiene derechos específicos en relación al p
recibió una copia de la Notificación de Garantías. Si usted necesita otro copia o le gustaría rec

This will bring you to a form with the same text, but in Spanish. Drop down lists may also be available in Spanish.

If the school or district name has a Spanish version entered in the School data entry screen, that name will appear in the header area (see image left).

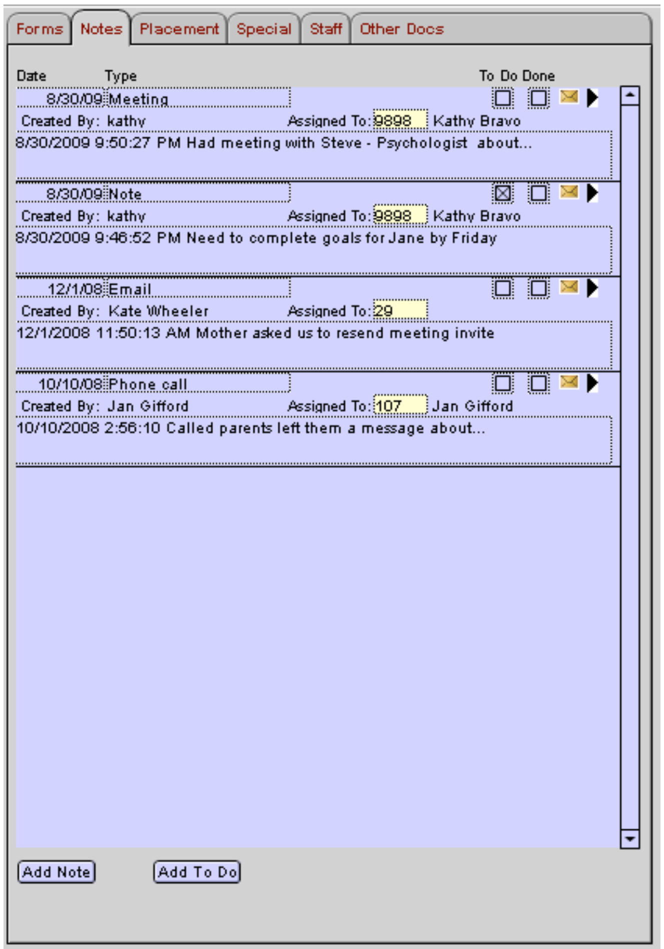
Once you have assigned a particular form in Spanish to a student, that form will open in Spanish each time. If you no longer wish it to do so, you will need to click the "English Version" button and then highlight and delete the word "Spanish" from the Language field (the Spanish form will still be available, it will just no longer default to the Spanish version for this student).



To return to the English Language Version, simply click the ***English Version*** button on the ***Form Navigation Bar***.

Notes Tab

This tab serves as the case note management screen.



Click on the ***Notes*** tab to access this area. Here you can type in any additional information pertaining to the student.

1) **Adding a Note or "To Do"**

   Selecting the ***Add Note*** button adds a standard note, assigned to the logged in user by default. It can be re-assigned to any user.

   Selecting the ***Add To Do*** button adds a note just as the ***Add Note*** button does, but with the ***To Do*** checkbox checked.

2) **Note Types:**

   There are 4 note classifications available: note, meeting, email or phone call. Users can use any (or none) of these preset types, or create customized ones to meet individual needs.

3) **To Do Feature:**

   Clicking the ***To Do*** checkbox and selecting a staff member from the ***Assigned To*** drop down box assigns the "to do item" to that staff member.

   This causes the note to appear on the ***To Do tab*** of their Staff screen and will also highlight the student's name in red on the appropriate ***Roles tab***, indicating that there is an open to do item for that student.

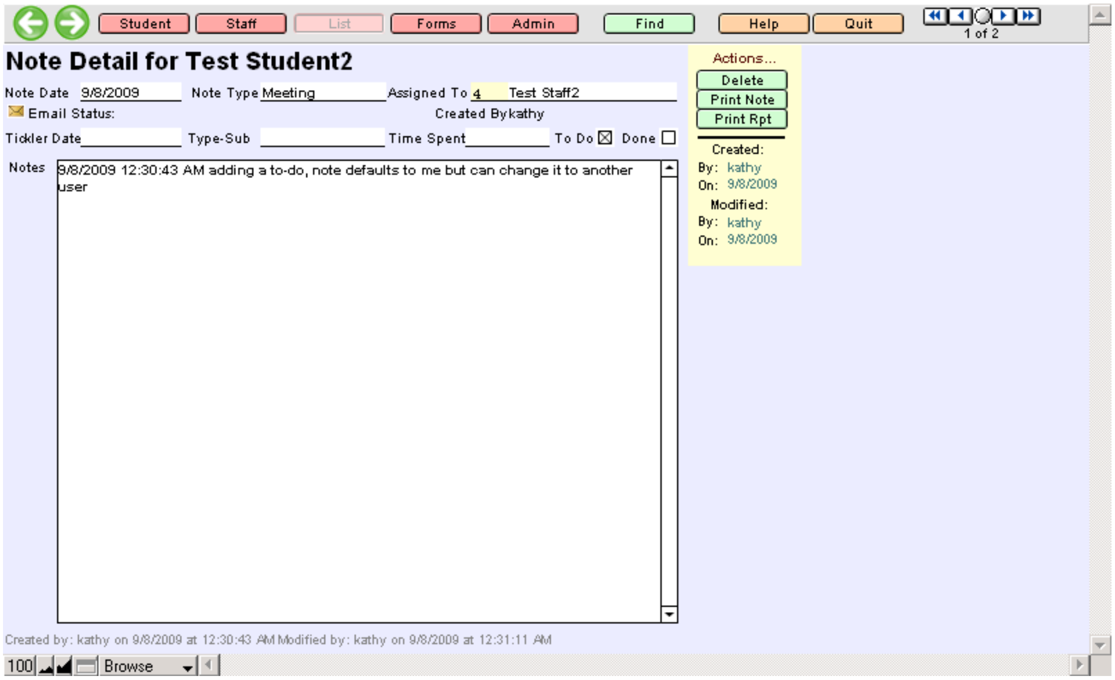
   Additionally, when the staff person logs in or returns to their staff screen entry, E-Com defaults to displaying the ***To Do tab*** until the respective note is marked as "done" via the ***Done*** checkbox.

4) **Viewing Note details:**

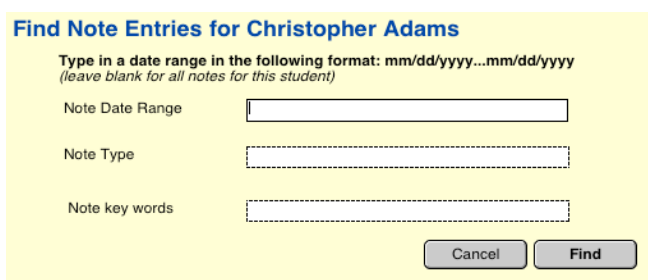
   The first couple lines of the note details are previewed directly on the ***Notes tab.*** Clicking the black triangle on the right side of each note displays the ***Note Detail Screen*** with the entire note contents.

Notes Details Screen

The Notes detail screen allows users to view the complete details of a particular note. For added convenience, extra fields such as 'Tickler Date' and 'Time Spent' are provided. From this screen, users can delete or print notes or create and print reports.

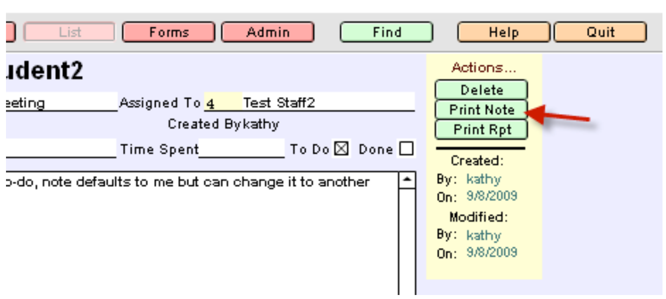


Finding Notes for a Particular Student



Clicking the ***Find*** button from the ***Navigation Bar*** while on the ***Note Detail Screen*** will display the dialog shown at right. Here you can enter search criteria to find specific case notes.

Printing –Individual Student Notes

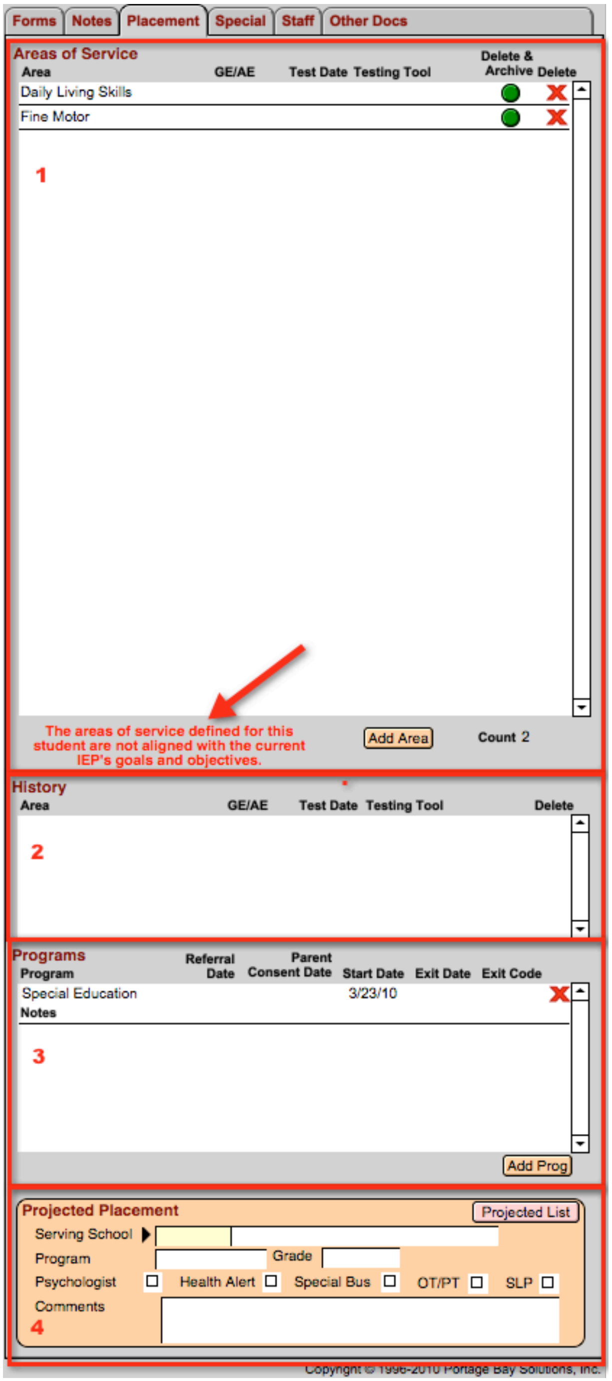


The ***Print Note*** button allows you to print the note for the paper file.

The ***Print Rpt*** button allows users to first perform a find and then print the found set of notes in a report format.

Placement Tab

This tab allows users to manually add & view areas of service (including service history and manage future placement).



The placement screen is divided into four areas:

1) The **Areas of Service** section

- Any area of service displayed here will also be listed on the ***Student Information section*** of the Student Screen.
- Clicking the ***Add Area**** button allows a authorized user to manually add a new Area of Service.
- Clicking the green ***Delete & Archive*** circle allows an authorized user to delete and archive areas into the ***History*** section.
- Clicking the Red **X** allows authorized users to delete areas that may have been added accidentally. Using this selection *does not* archive the Area of Service.

* Areas of service added here (and not via the ***Evaluation Report***) will display an error warning a user that doing so may cause discrepancies between the areas identified during the evaluation process and the IEP. **Only users with level 3 access or higher can edit areas of service from this tab.**

However, depending on your district's policies, services are entered via varying processes. Please check with your Special Ed secretary for further instructions regarding your district's practices.

Goal forms added with different Areas of Service than what are defined by the evaluation will display the alert shown in red.

2) The **History** section shows prior qualifying areas and testing information.

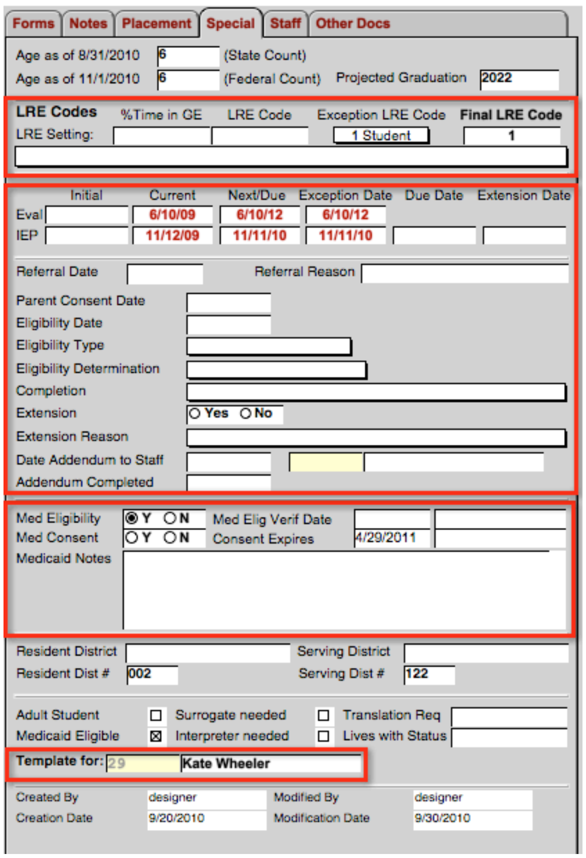
3) The **Programs** section shows the program(s) to which the student belongs.

4) The **Projected Placement** section acts as a planning tool to track future placement and services for the student.

- When you add a school here for a given student, they will appear in the ***Projected School*** list on the ***School Data Entry Screen***.

Special Tab

The ***Special tab*** contains data required for using E-Com, for state and federal compliance, as well as fields that were added at the request of specific districts. Use of fields on this tab varies by district. Please check with your Special Ed secretary for further instructions.



A few of the fields to note are:

1) **LRE Codes section**:
   Data in this section is generated when the IEP Summary Matrix form (#14.1) is completed for a student. For data to correctly display here:
   - The dates (esp. the **year**) set in the "Age as of" fields need to be set to the current school year. If they aren't, contact your Admin for updating.
   - The user must select an LRE setting and add service(s) being provided to the student.

   LRE Codes can also be overridden via the ***Exception LRE Code*** field. Values entered here will be copied to the LRE Code & Final LRE fields automatically.

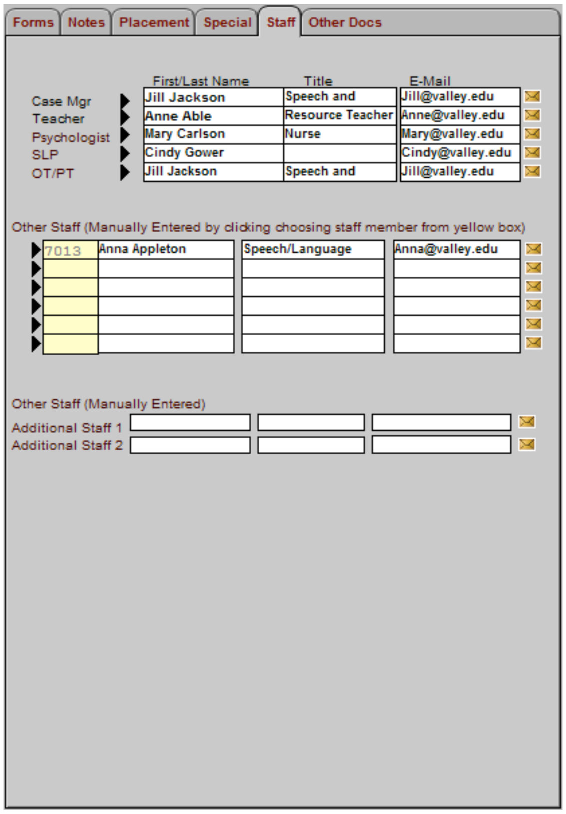
2) **Eval and IEP date fields**:
   - **Current and Next/Eval date fields**: Conforming to state and federal standards, the ***Next IEP*** and ***Next Eval*** fields default to *1 or 3 years minus a day* (respectively) from the current date set.
   - **Exception Date fields**: Adding an ***Exception Date*** will also modify the respective ***Next/Due*** field entry.
   - **Due Date** field: The date that an evaluation is due may be entered here.
   - Other information, such as referral date, parent consent date, and the like may also be added.

3) **Medicaid Eligibility:**
   - The student's Medicaid status may be entered here. If the student is marked as eligible here, there will be a red header on the student screen. If an expiration date is entered here, it will appear in that header.

4) **Template For fields:**
   Use of this field ties the student being viewed to the listed staff member's ***My Template*** button.

Staff Tab

The ***Staff Tab*** is used to specify additional staff members working with the student.



On the top of the tab, you will find the staff members currently assigned to the student via the ***School, Staff and Notes*** settings of the student screen.

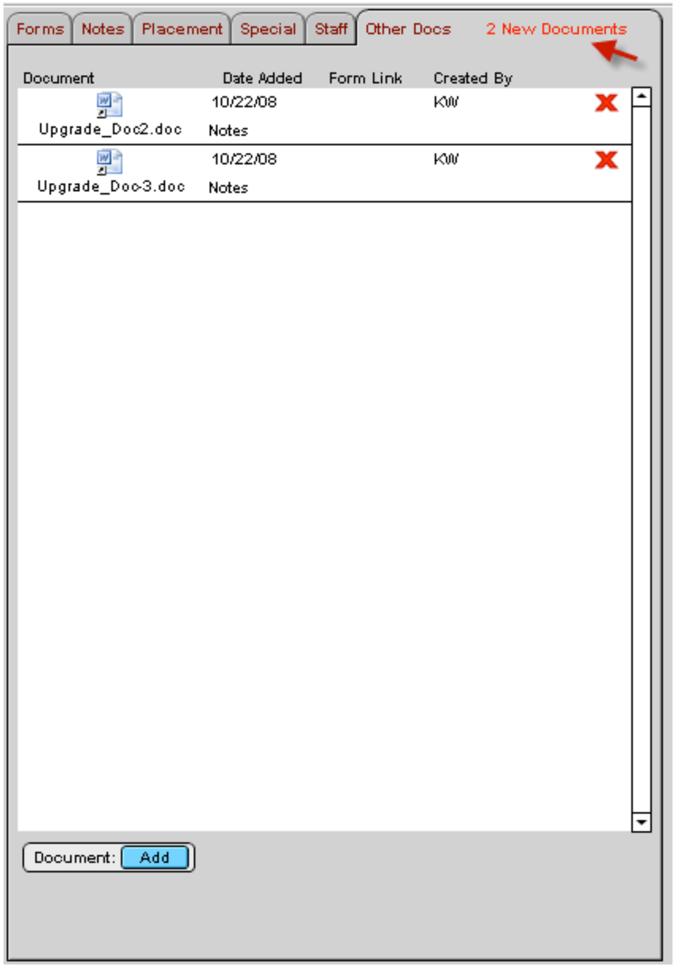
The next two sections allow users to add alternate staff members working with the student.

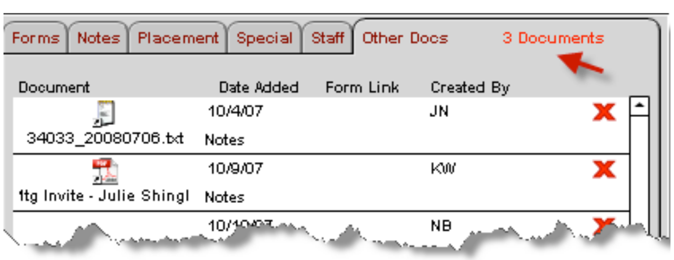
1) **To add a staff member**:
   - Click in the yellow pop-up box and click on the desired staff member.
   - Adding staff members to *active students* from this screen will cause the student to appear on that staff member's ***Other tab*** screen.
2) **To remove a staff member:**
   - Delete the staff number and the rest of the fields will automatically blank out.
   - Manually entered staff will need to be completely manually deleted.
3) **To email a staff member**:

Click the envelope icon.

Other Docs Tab

The ***Other Docs tab*** allows for tracking of non-E-Com documents related to the student (MS Word, pictures, scanned documents etc.).





When documents are added, red text will appear at the top indicating the number of "*new*" documents - ones added within the last week (as shown by the arrow) or the *total* number of documents (as shown by the arrow in the lower image).

To ensure visibility, the document count on this tab can be seen on the ***Student Entry screen*** regardless of which tab is being viewed.

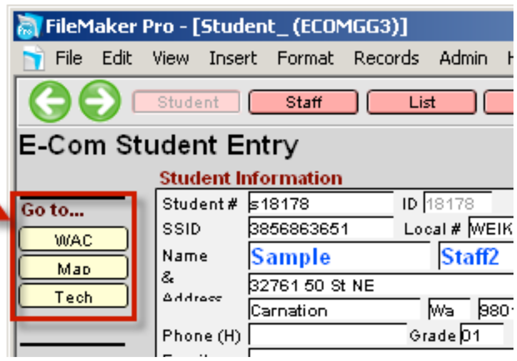
1) To **Add** a document
   - Select the ***Add*** button at the bottom of the tab and select a file.
   - You may use the ***Notes*** field to add comments about the file you are attaching.
   - For a document to be *accessible to all users*, the document must be placed on a common file server or shared network drive before being attached to the student's record in E-Com. Documents that only reside on a user's computer will only be available to that user.

2) To **Delete** a document
   - Click on the Red **X** (the ***Delete*** button).
   - Users are only able to delete documents they add.

Additional Features Available on the Student Screen

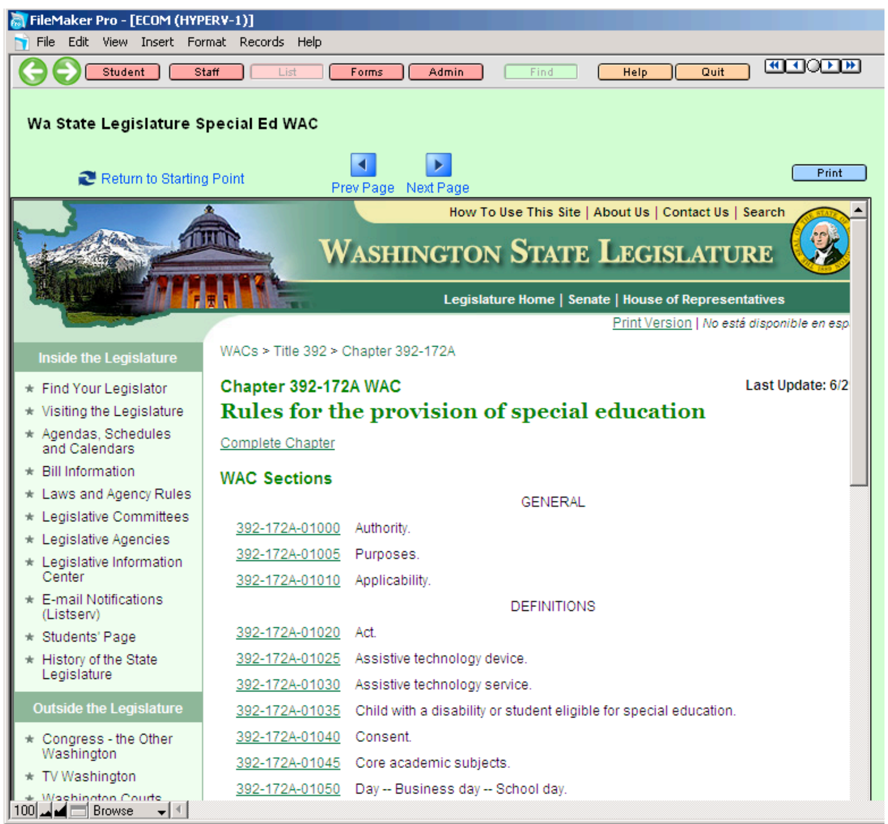
For user convenience the following useful features are also available via easily accessible buttons.

Website Shortcuts

	From the "Go To" buttons you can access: ***Washington Administrative Code (WAC)*** ***Google map linked to Student's address*** ***OPSI IEP Technical Assistance Module Website***

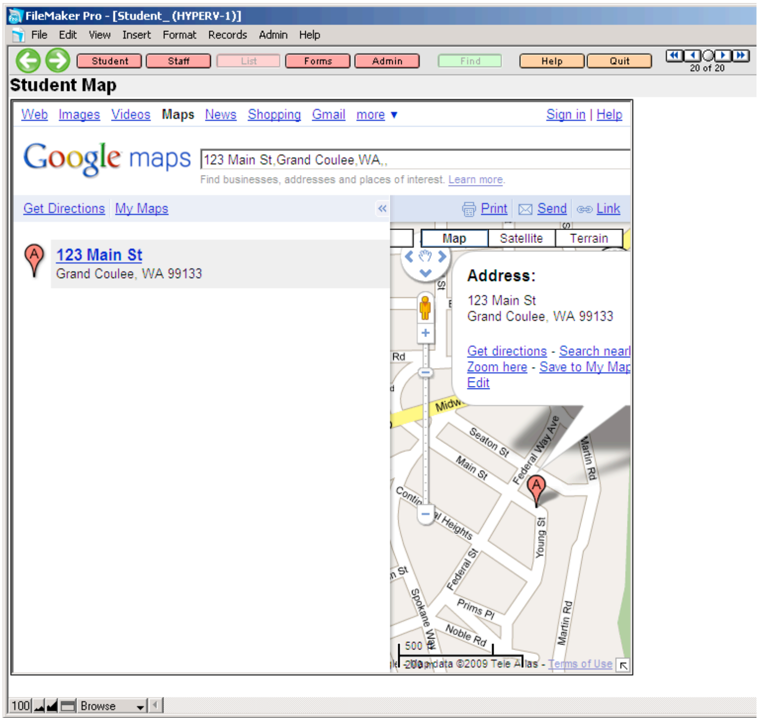
WAC Button - WAC Website

The 'WAC' button displays the screen shown below. The special education WACs are not stored in E-Com, but rather the state's WAC web site is displayed in a window within E-Com. This insures that the WAC information in E-Com is never out of date.



Map Button - Google Map of Student Address

The Map button displays the Google map web site with the student's address mapped. From within E-Com, you can perform all the Google map actions you could normally use directly via a web browser.

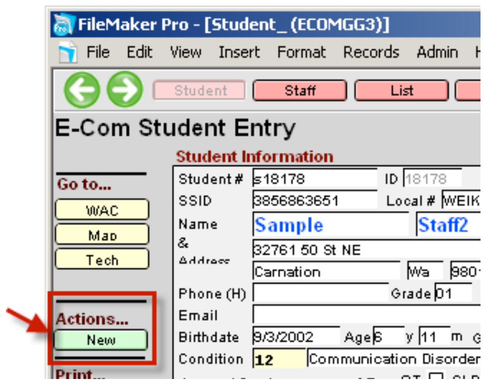


Tech Button – Tech Module Website

Adding New Students

Students are entered into the system in a variety of ways, primarily depending on whether your district uses automatic imports from its student information system.

Manually Adding Students



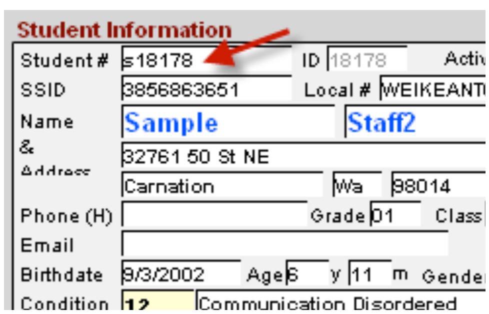
To add a student entry, select the ***New*** button shown.

If your district does not use automatic imports, all students will be entered into the system this way.

Depending on your district's policies, this will be done by one or more individuals. Check with your Special Ed secretary for further information regarding the policies for your school.

Auto-populated data via Imports

If automatic imports from your district's student information system have been established, students will be entered into E-Com by one of 3 ways.



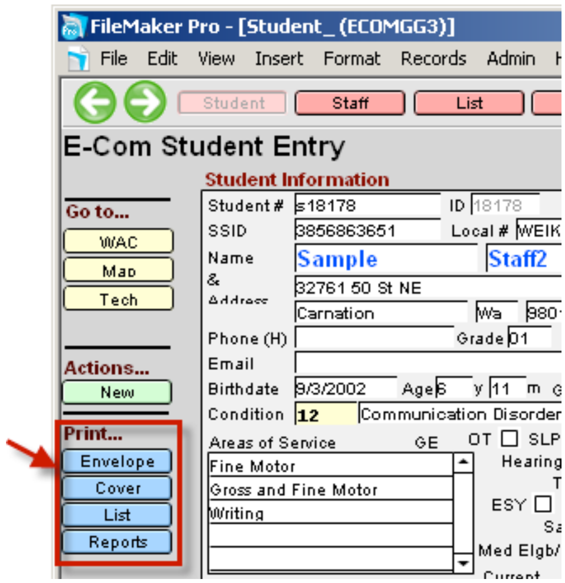
1) Students classified as active Special Ed in the district's student information system are completely* pulled in via an automated process.
2) For new student referrals or transfers, users can select the ***New button*** and then enter the student's ***Student #*** (see left).

   If the student has been entered into the school's student information system **and** the import was successful, data for the student will automatically populate into E-Com.
3) If the scenario detailed above does not populate the data, the student either has not yet been added to the school's information system **or** the import has not yet occurred.

   In that case, the remainder of the student data will need to be entered manually or users can wait for the import to take place before entering the new student.

* ***Note*** - The information populated varies depending on the student information system used by each district, but typically includes data for the ***Student Information*** and ***School, Staff and Notes*** sections.

Print Shortcuts



1) Envelope - This prints an envelope addressed to the parents of the student. The salutation format will be set according to the choice set for the 'Address to Print' field on the ***Parent Information section***.

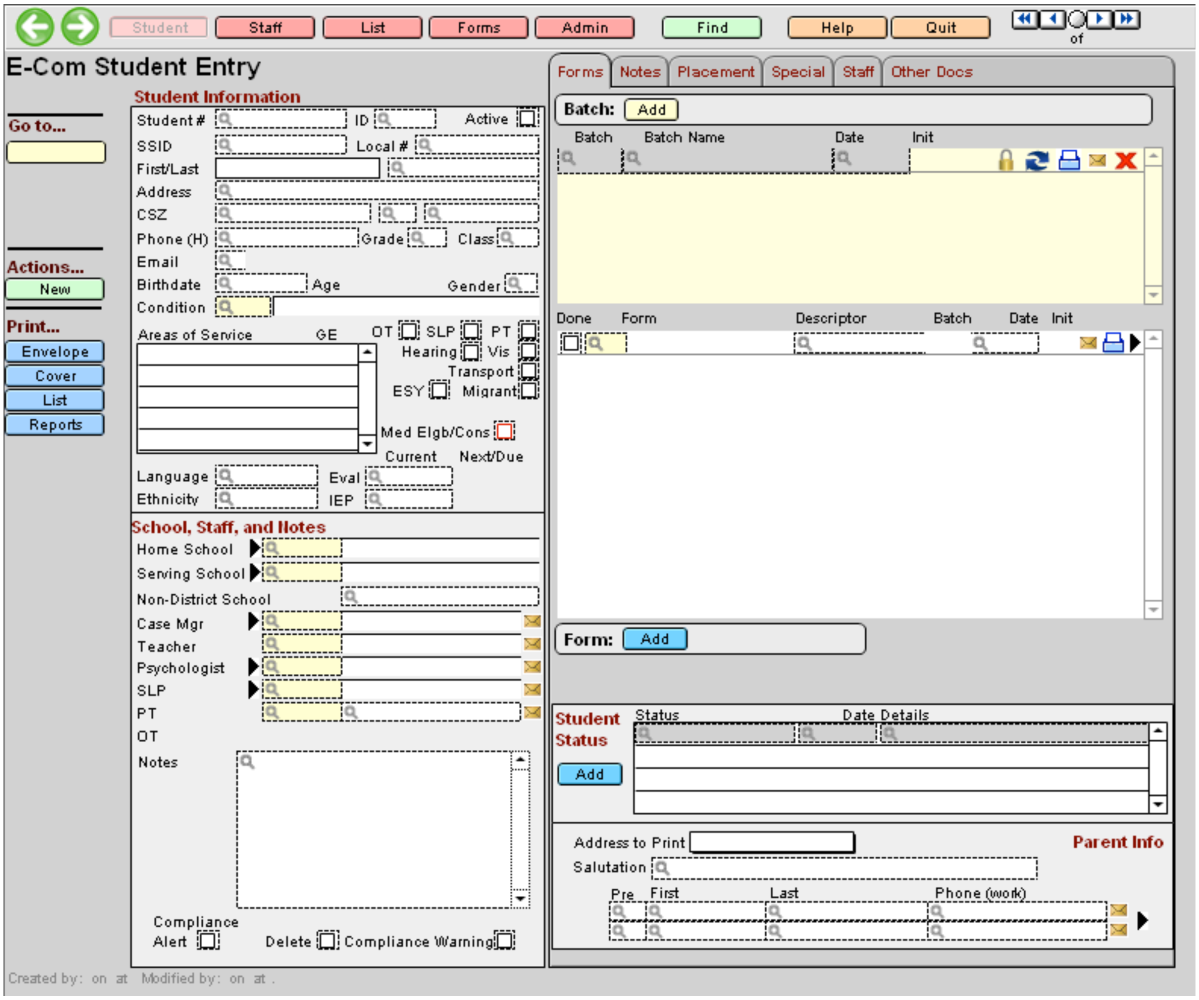
2) Cover – Prints a cover sheet that includes the data from the Student Information section, Schools, Staff Assignments, Parent Information and Areas of Service.

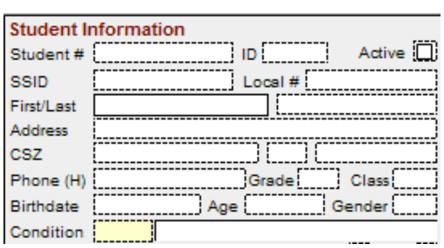
3) List – Prints a list view with high level data about the student.

4) Reports - Sends the user to the ***E-Com Reports screen***. In addition to a number of reports based on code, grade, age, case manager, etc., you will also find a button that allows you to print labels in 5160 format, with a choice of 1 or 3 labels per student. Salutation on these labels may be changed in the same way as on the envelopes above.

Finding a Student

From the Student screen, click the ***Find*** button on the Navigation Bar (or use the Ctrl-F keyboard shortcut). The Student screen will display a magnifying glass for all the fields a user can search.





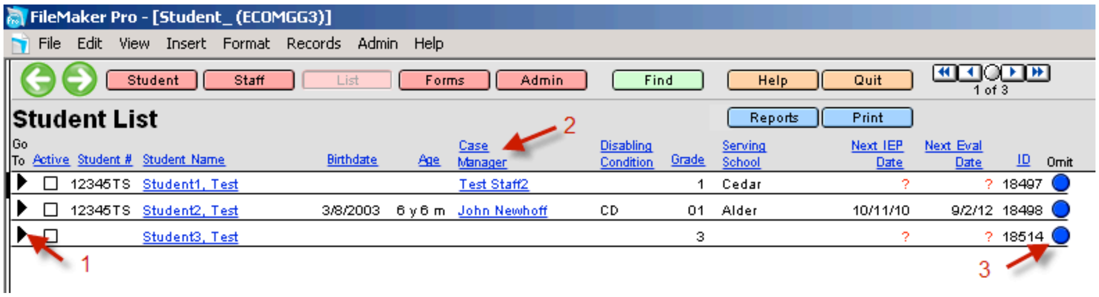
Type in search criteria, such as the student's last name or number. Use the ***Tab*** key to move the cursor from one field to the next.

Click 'Enter" on the keyboard to execute your Find.

Note: It's usually better to type in just part of the student's name. A couple of characters of the first name and a couple of characters of the last name is nearly always sufficient for E-Com to find your student.

For thorough examples of advanced search operators or for more specific examples, see *"Performing Finds"*.

If only one student is found that matches your criteria, it will be shown on the Student screen. If more than one student is found, this ‘found set’ of students is displayed on the student listing screen shown below.



1. Click the black triangle to view student detail.

2. Click the case manager name to sort the student list by case manager name. You may sort by any of the blue underlined headers.

   Students may be sorted in either ascending alpha order or descending. Click once on the “Student Name” header to sort A-Z, and a second time to sort Z-A.

3. Click the blue circle to omit the student from the current list. ***Note*** - This does not delete the student record, but simply hides it from view.

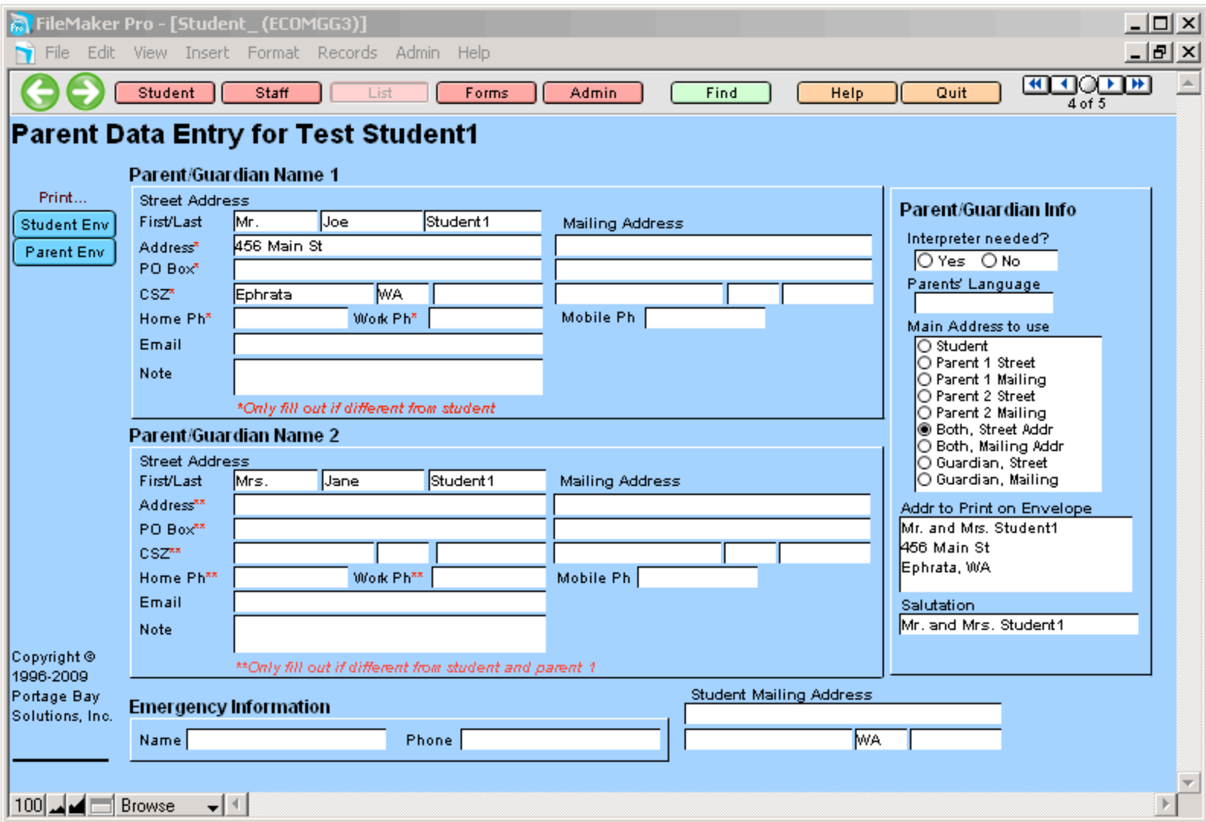
Chapter 5: Other Data Entry Screens

There are two other important data entry screens that are not accessed regularly: Parent Data Entry and School Data Entry.

Parent Data Entry Screen

The Parent Data Entry screen is relatively straightforward. There are fields available for one pair of parent/guardians and one emergency contact entry. Additionally, there are shortcuts for printing either student or parent envelopes.

Fields available here and on the ***Parent Information section*** on the Forms tab (of the Student Screen) access the same portion of the database. Any changes to the fields on one of the screens will automatically modify the fields on the other screen.



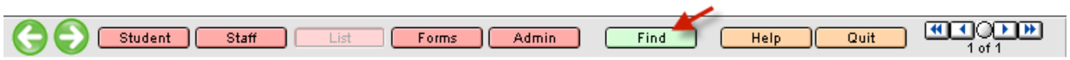
Chapter 6: Performing Finds

Users will find they typically have a number of records that they need to work on. E-Com has a comprehensive find feature to support this need. To search for specific records, users can access the find utility in a variety of ways on almost any screen.

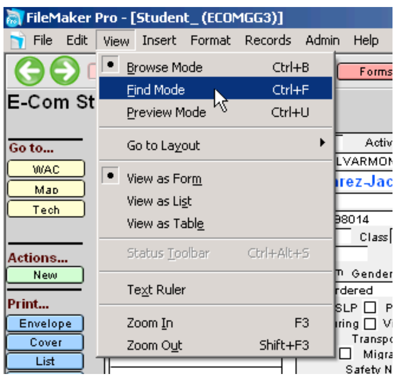
Entering and Exiting Find Mode

Users can access ***Find*** mode in a variety of ways:

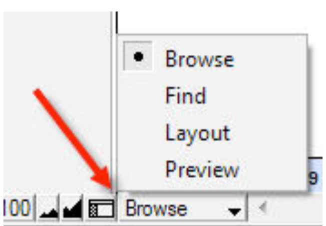
1. Selecting the ***Find button*** from the Navigation Bar.



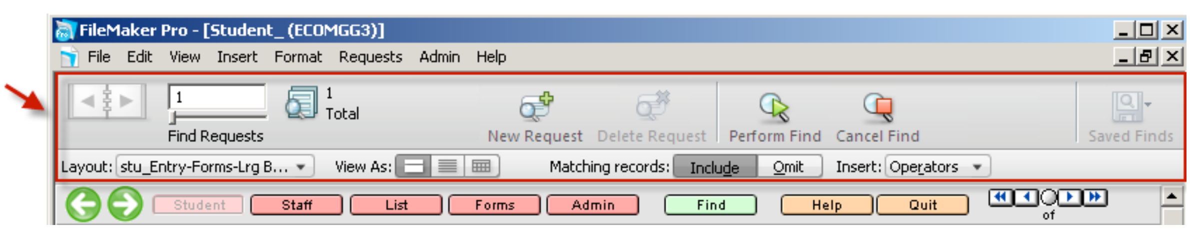
2. Selecting ***Find Mode*** from the View menu.



3. Switching to Find mode from the bottom of the E-Com screen.



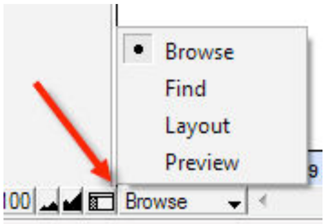
Once in find mode, the ***Status Area*** (highlighted below) appears on the screen directly above the ***Navigation Bar***.



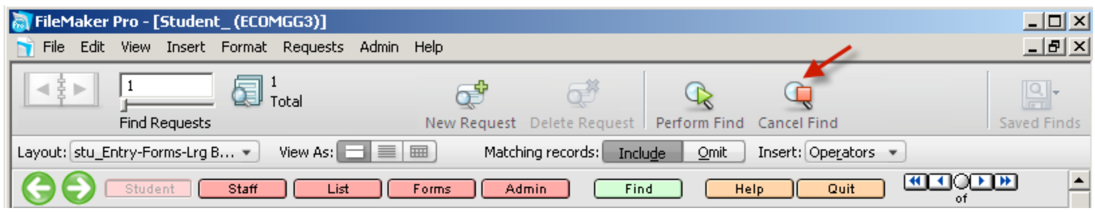
The ***Status Area*** contains the symbols (used to specify find requests) and the Omit checkbox (used to confine found sets). Specific find types and examples are listed in the successive sections, with the syntax needed for each find type.

If you start a ***Find*** operation, but then change your mind, don't click the ***Quit*** button. Instead, users can also exit ***Find*** mode in a variety of ways:

1. Switching to Browse mode from the bottom of the E-Com screen.



2. Selecting the "Cancel Find" button on the ***Status Area.***



3. Using the Navigation Bar, navigate to another screen and back to clear Find mode. For example, switch from the Student to the Staff screen, then back to the Student screen.

4. When a find does not produce results, users are given an option to "Modify Find" or "Cancel".

Finding Text, Dates, and Numbers

To Find	Type this in the field	Examples
Words that start with Roman characters	The characters	Chris Smith finds **Chris Smith**, **Smith Chris**, **Chris Smithson**, and **Smith Christenson**
A phrase or sequence of characters	The text, including spaces and punctuation, between the double quotation marks (")	"Marten and Jones Interiors" finds **Marten and Jones Interiors** but not **Jones and Marten Interiors** ", Ltd." finds all companies with **", Ltd."** in the name, but not those without the comma.
Words with one or more unknown or variable characters	One wildcard character (@) for each unknown character	Gr@y finds **Gray** and **Grey** @on finds **Don** and **Ron** but not **Bron**
Invalid characters in a text field	?	Invalid characters display as blank characters Note: To find the ? character, search for "?"
Digits in a text field	A # character for each digit	# finds **3** but not **30** ## finds **30** but not **3** or **300** #3 finds **53** and **43** but not **3**
Words with zero or more unknown or variable text characters in a row	* for all unknown characters	Jo*n finds **Jon** and **John** J*r finds **Jr.** and **Junior** *phan* finds **Phan** and **Stephanie**
Symbols or other non-alphanumeric characters, such as punctuation or spaces	The characters, including spaces and punctuation, between the double quotation marks (")	"@" finds **@** (or an email address, for example) "," finds records containing a comma " " finds three spaces in a row
Words with accented characters	The text, including spaces and punctuation, between the double quotation marks (")	"òpera" finds **òpera** but not **opera** (òpera without quotes finds both **òpera** and **opera)**
Partial phrases (a sequence of words or characters)	Characters, punctuation, and spaces between the double quotation marks ("). Use * to find this text in the middle of a longer text string	*"son & Phillips" finds **Johnson & Phillips** and **Paulson & Phillips**
Exact matches of the text you specify	== (two equal signs)	==John finds **John** but not **John Smith** ==John Smith finds **John Smith** but not **Smith, John** or **John Smithers**
Exact matches of whole words you specify	=	=Market finds **Market**, **Market Services**, and **Ongoing Market Research** but not **Marketing** or **Supermarket** =Chris =Smith finds **Chris Smith** or **Smith Chris** but not **Chris** or **Christopher Smithson**
A number in a number field or in a calculation field that produces a numeric result	The number	.50 finds **.5**, **.50**, and **$.50**

To Find	Type this in the field	Examples
One or more digits in a number field or in a calculation field that produces a numeric result	A # character for each digit	# finds **3** but not **30** ## finds **30** but not **3** or **300** #3 finds **53** and **43** but not **3**
Invalid data (fields with no numeric digits) in a number field or calculation field that produces a numeric result	?	? finds **twelve** but not **12** or **twelve30**
A date in a date field or in a calculation field that produces a date result	The date as digits, separated by a valid date separator character (such as a slash or hyphen)	3/3/2003 finds **3/3/2003**, **March 3, 2003**, and **3-3-2003**
Today's date in a date field or in a calculation field that produces a date result	//	// finds **April 4, 2004** (when the current date is 4/4/2004)
A time in a time field or in a calculation field that produces a time result	The time as digits, separated by colons	12:53:09 finds **12:53:09**
Dates on a day of the week in a date or timestamp field	The day of the week	Tuesday finds all dates that occur on a Tuesday =Thu finds all dates that occur on a Thursday

Finding Empty/Non-Empty Fields

To Find	Type this in the field	Examples
Not empty (i.e., fields that have data)	*	* finds all records with data
Empty	=	= finds all records with empty data in the specified field

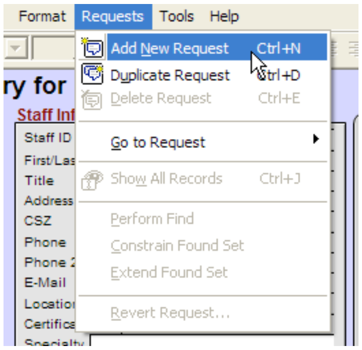
Finding Duplicates

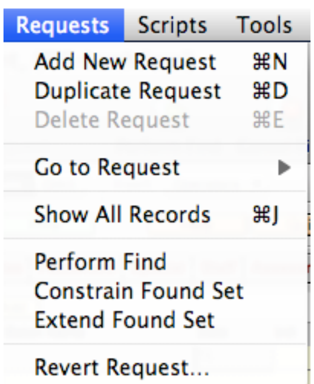
To Find	Type this in the field	Examples
All records with duplicate information in specified field	!	! returns duplicate records

Finding Ranges of Information

To Find	Type this in the field	Examples
Less than a specified value	<	<40 finds numbers 1-39 <9/7/2004 finds dates before 9-7-04 <M finds text entries from A-L
Less than or equal to a specified value	<= or £	<=95129 £05:00:00 <=M
Greater than a specified value	>	>95129 >9/7/2004 >M
Greater than or equal to a specified value	>= or ³	>=100 >=9/7/2004 ³8:00 ³M
Within the range you specify	.. or ... (two or three periods)	12:30...17:30 1/1/2003..6/6/2004 A...M Mon..Fri
Within the sub-range you specify	{..} or {...} (two or three periods)	7/{1...15}/2005 {1..3}/{10..16}/2006 12:{30..45} {7...9}:15 PM

Finding Records that Match Multiple Criteria





To find records matching all criteria specified (logical AND search):
Example:
To find all students named Smith in a given elementary school, type Smith in the **Last Name** field and select the school from the drop-down list under "Home School."
Click ***Find***.

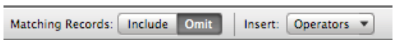
There are two methods that can be used to find records matching at least one of the sets of criteria, but not necessarily all (logical OR search). The second method (Extend Found Set) is particularly helpful when you have run a Find and discovered that it did not find all those students you needed.

Example (same criteria):
To include students with one condition and students with another in the found set, enter the first condition in the Condition field.
Add a new find request by selecting **Add New Request** from the **Request** menu.
Enter the second condition in the Condition field in the second request. Click ***Find***.

Example (different criteria):
To include all students in a particular grade, and all students with a particular condition, click Find and type the grade in the **Grade** field. Hit enter or click ***Find*** to perform the find.
Once E-Com has found these students, click ***Find*** again. Enter the condition you want in the Condition field.
Do ***not*** click Find or enter; instead, go up to the Requests drop-down on the menu bar and select "Extend Found Set." Once you do this, the second find will run, and will add the students with that condition to the students already found.

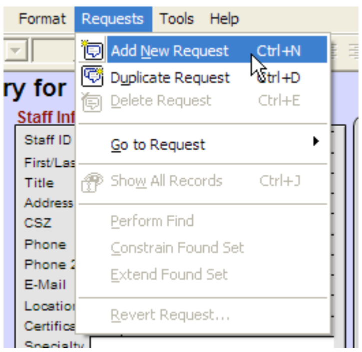
Finding Records except those Matching Certain Criteria

To find records that don't match criteria:

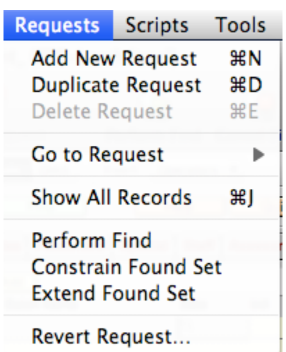


Example:
In find mode, type criteria you wish to omit - To find all students except those with a particular condition, enter that condition in the Condition field.
Select *Omit* from the “Matching Records:” option.
Click *Find*.

There are two different methods to find some records while omitting others. The second method is particularly helpful when you have run a Find and discovered that you need to narrow the found set.



Example:
In Find mode, type the criteria for the records to find - to find male students with a particular condition, start by entering the condition in the condition field.
Choose Requests menu > Add New Request.
To exclude female students, you would select F in the Gender field and select Omit.
Click *Find*.



Example:
To find active students with a particular condition, click Find and enter the condition in the Condition field. Click Find again.
When the found set is returned, you realize you want to omit students who are in a particular school.
Click the Find button again, and enter the school in the School field.
Select Omit from the Matching Records area.
Do ***not*** click Find or enter. Instead, go up to the Requests drop-down on the menu bar and select “**Constrain Found Set**.”
This will remove students in that particular school from the current found set.

Chapter 7: Reports

A variety of reports are available to ease the management of the special education process.

The following reports are accessible via the ***Student Entry*** screen. A “Find” should be done prior to printing any of these reports, to ensure that all the students needed are in the found set that will be printed.

1. Student Information List
2. Parent Information List
3. Student Condition
4. Medicaid Eligible
5. Student Service Areas
6. Class Roster
7. Labels in 5160 format
8. Placement Summary
9. Reports Due
10. 504 Roster
11. Student Status
12. Roster w/Notes
13. Projected Class Roster
14. Student listings:
    - Students by Age at State Count Date
    - Students by Case Manager
    - Students by Chronological Age
    - Students by Disabling Condition
    - Students by Ethnicity
    - Students by Fed Count Category
    - Students by Gender
    - Students by Grade
    - Students by IEP Due Date
    - Students by LRE Code
    - Students by Name
    - Students by OT
    - Students by Psychologist
    - Students by PT
    - Students by Reevaluation Date
    - Students by School
    - Students by SLP
    - Students by Teacher

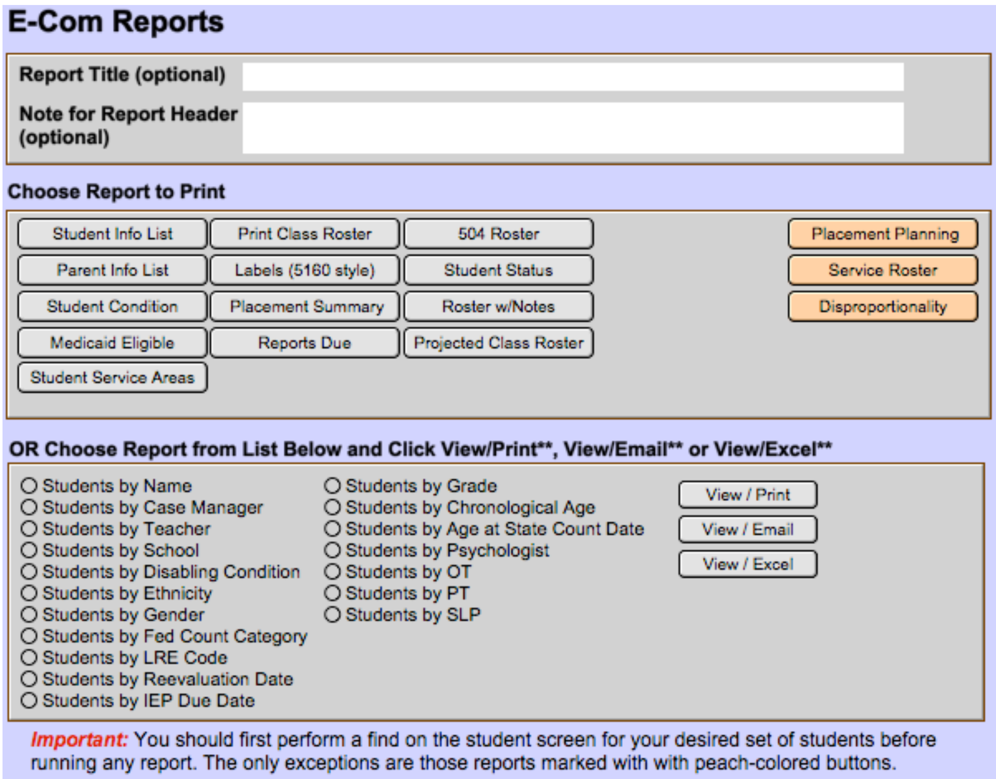
In addition to printing and emailing (if your district allows that), you may also export any of these reports to Excel.

Three other reports are also available from this screen; these three do not need a “Find” done beforehand:

1. Placement Planning
2. Service Roster
3. Disproportionality

Procedures for Printing Reports

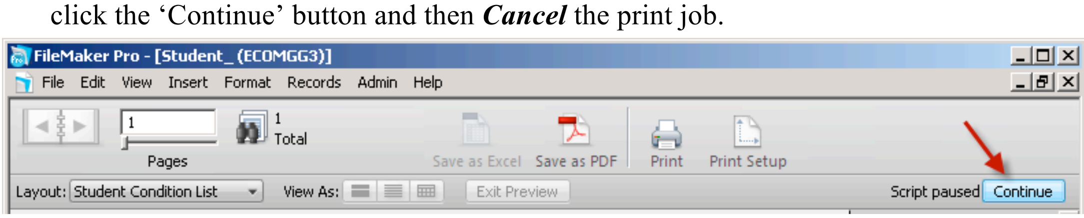
From the ***Student Screen***, click the ***Reports*** button. The E-Com Reports Screen will be shown. You may get a message reminding you to be sure you have found all the student records for the report in question.



The '***Report Title***' and '***Note for Report Header***' fields allow you to define any desired title/header for any report except the three with orange-colored buttons. These three have automatically generated titles.

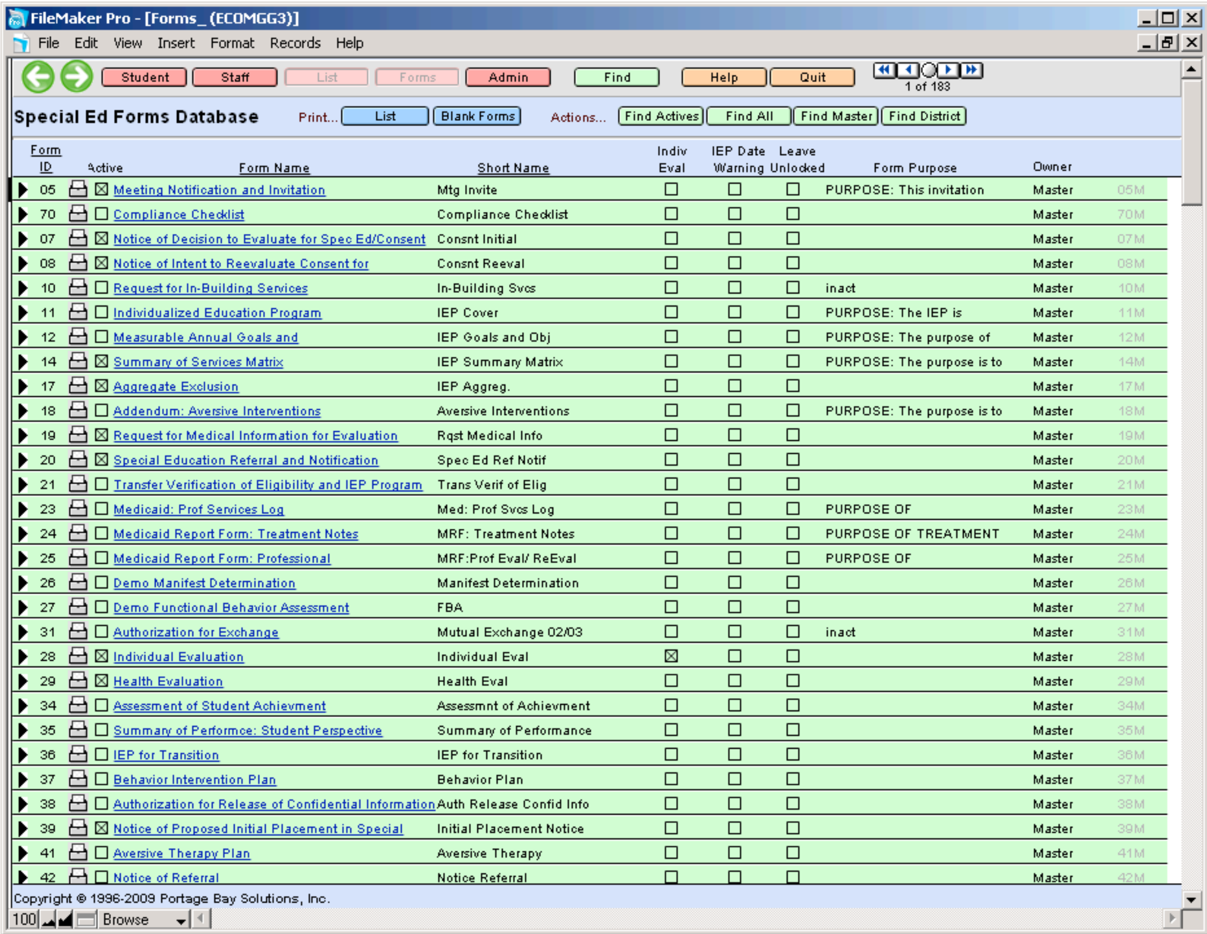
The instructions for printing reports are displayed directly on the screen.

1. Go to the Student screen and click the Find button to locate the student records you want to print.
2. Click on the Reports button on the Student screen to return to this screen.
3. If you would like any additional text to appear in the report header, type it into the appropriate field.
4. Click the desired Report button. If you select one of the "Students by..." reports, or the Service Roster, you have three different options – you may print the report, you may email the report, or you may export the report in Excel format.
5. Once the report is displayed, you will see the ***Status Area*** (shown below). From there, click the ***Continue*** button to bring up the Print dialog box. If you decide not to print it, click the 'Continue' button and then ***Cancel*** the print job.



Chapter 8: Forms Database

By selecting the Forms button from the Navigation Bar, users may be able to access a complete listing of all the forms available in E-Com; your district may not allow this.

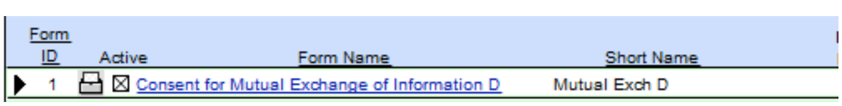


Form ID	Active	Form Name	Short Name	Indiv Eval	IEP Date Warning	Leave Unlocked	Form Purpose	Owner	
05	☒	Meeting Notification and Invitation	Mtg Invite	☐	☐	☐	PURPOSE: This invitation	Master	05M
70	☐	Compliance Checklist	Compliance Checklist	☐	☐	☐		Master	70M
07	☒	Notice of Decision to Evaluate for Spec Ed/Consent	Consnt Initial	☐	☐	☐		Master	07M
08	☒	Notice of Intent to Reevaluate Consent for	Consnt Reeval	☐	☐	☐		Master	08M
10	☐	Request for In-Building Services	In-Building Svcs	☐	☐	☐	inact	Master	10M
11	☐	Individualized Education Program	IEP Cover	☐	☐	☐	PURPOSE: The IEP is	Master	11M
12	☐	Measurable Annual Goals and	IEP Goals and Obj	☐	☐	☐	PURPOSE: The purpose of	Master	12M
14	☒	Summary of Services Matrix	IEP Summary Matrix	☐	☐	☐	PURPOSE: The purpose is to	Master	14M
17	☒	Aggregate Exclusion	IEP Aggreg.	☐	☐	☐		Master	17M
18	☐	Addendum: Aversive Interventions	Aversive Interventions	☐	☐	☐	PURPOSE: The purpose is to	Master	18M
19	☒	Request for Medical Information for Evaluation	Rqst Medical Info	☐	☐	☐		Master	19M
20	☒	Special Education Referral and Notification	Spec Ed Ref Notif	☐	☐	☐		Master	20M
21	☐	Transfer Verification of Eligibility and IEP Program	Trans Verif of Elig	☐	☐	☐		Master	21M
23	☐	Medicaid: Prof Services Log	Med: Prof Svcs Log	☐	☐	☐	PURPOSE OF	Master	23M
24	☐	Medicaid Report Form: Treatment Notes	MRF: Treatment Notes	☐	☐	☐	PURPOSE OF TREATMENT	Master	24M
25	☐	Medicaid Report Form: Professional	MRF:Prof Eval/ ReEval	☐	☐	☐	PURPOSE OF	Master	25M
26	☐	Demo Manifest Determination	Manifest Determination	☐	☐	☐		Master	26M
27	☐	Demo Functional Behavior Assessment	FBA	☐	☐	☐		Master	27M
31	☐	Authorization for Exchange	Mutual Exchange 02/03	☐	☐	☐	inact	Master	31M
28	☒	Individual Evaluation	Individual Eval	☒	☐	☐		Master	28M
29	☒	Health Evaluation	Health Eval	☐	☐	☐		Master	29M
34	☐	Assessment of Student Achievment	Assessmnt of Achievment	☐	☐	☐		Master	34M
35	☐	Summary of Performce: Student Perspective	Summary of Performance	☐	☐	☐		Master	35M
36	☐	IEP for Transition	IEP for Transition	☐	☐	☐		Master	36M
37	☐	Behavior Intervention Plan	Behavior Plan	☐	☐	☐		Master	37M
38	☐	Authorization for Release of Confidential Information	Auth Release Confid Info	☐	☐	☐		Master	38M
39	☒	Notice of Proposed Initial Placement in Special	Initial Placement Notice	☐	☐	☐		Master	39M
41	☐	Aversive Therapy Plan	Aversive Therapy	☐	☐	☐		Master	41M
42	☐	Notice of Referral	Notice Referral	☐	☐	☐		Master	42M

There may be two copies of each form number: one Master version and one District version. Master versions are highlighted in green.

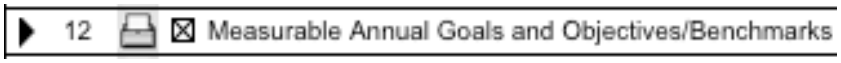
Active forms are indicated by an X in the Active check box. This means these forms will show up in the Forms pop-up menu on the *Student Entry* screen.

Viewing a Specific (Blank) Form



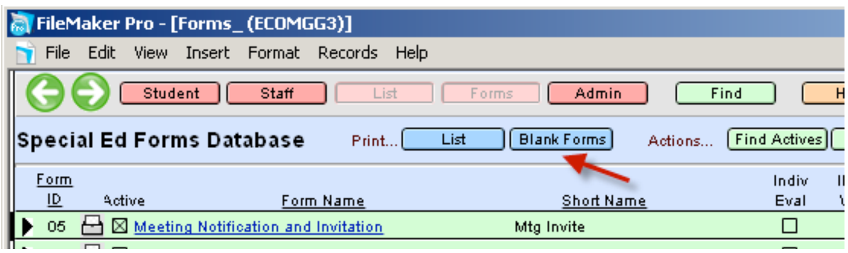
To view an individual form, click on the blue underlined form name.

Printing a Specific Blank Form



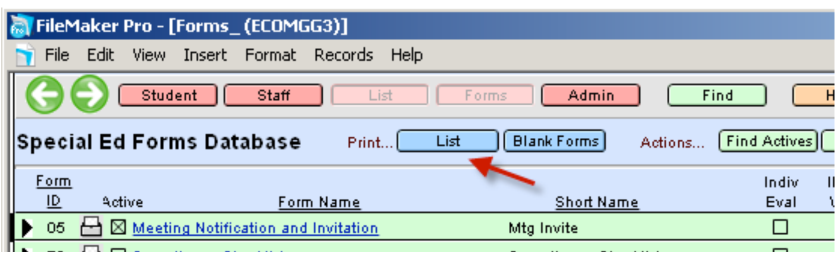
To print an individual blank form, click on the ***Printer*** icon next to the desired form.

Printing a Set of Blank Forms



To print a blank copy of all forms in the current found set, click the ***Blank Forms*** button.

Printing a List of the Forms Database



To print a list of the forms, click the ***List*** button. A Sample List report is shown below.

E-COM Special Education Forms List

Form #	Active	Form Name	Short Name
01	☒	Evaluation Report	Eval Report
02	☒	Individual Documentation of Assessment Results	Assessment Results
03	☒	Individualized Education Program	IEP Present Levels
04	☒	Measurable Annual Goals and Objectives/Benchmarks	IEP Measurable Goals
05	☒	Report of Student Progress	IEP Student Progress
06	☒	Transition	IEP Transition
07	☒	Summary of Services Matrix	IEP Service Matrix
08	☒	Addendum: Aversive Interventions	IEP Addendum: Aversive
09	☒	Medicaid Eligibility Verification	Medicaid Eligibility
10	☒	Authorization for Release of Records	Auth Release of Records
11	☒	Invitation to Attend Meeting	Invite to Mtg
12	☒	Parent Consent	Parent Consent
13	☒	Prior Written Notice	Prior Written Notice
14	☒	Medicaid Report Forms: Professional Services Log	MRF:Prof Serv Log
15	☒	Medicaid Report Form: Treatment Notes	MRF:Treatment Notes
16	☒	Medicaid Report Form: Professional Evaluation/Reevaluation Log	MRF:Prof Eval/ ReEval
17	☒	Request for Due Process Hearing	Due Process Hearing
18	☒	Record of File Access	File Access
19	☒	IEP Combined	IEP All Forms Combined

Chapter 9: Glossary

Browse Mode: Browse mode lets you enter data and look at records. Browse mode is the default mode of the E-Com system. See "Mode" in this glossary to find out how to change modes.

Button: A button is a picture of a button on a screen, that, when clicked, will perform an automated function. Three types of buttons are used in the E-Com system:

1. **<u>Navigation button</u>**: You bring up E-Com's screens by clicking the appropriate button. Navigation buttons include "goto" buttons and buttons that bring you to a new blank screen, such as the "New Student" button on the Student Data Entry screen.
2. **<u>Task button</u>**: Some common E-Com tasks, such as printing, have been assigned buttons.
3. **<u>Radio button</u>**: A button that looks like a two-dimensional circle instead of a three-dimensional button. **Radio buttons** are used when there is a list of two or more options that are **mutually exclusive** and the user must select only one choice. Clicking a non-selected radio button will deselect whatever other button was previously selected in the list.

Check Box: A field that, like a radio button, acts as a toggle switch between two opposing conditions, such as "true" and "false." When you click in an empty check box, an "X" appears in it. This is the "true" or "yes" position. When you click in a check box showing the "X," the "X" disappears. This is the "false" or "no" position. **Checkboxes** are used when there are lists of options and the user may **select any number** of choices, including none, one, or several. Each checkbox is independent of all other checkboxes in the list; checking one box doesn't uncheck the others. A **stand-alone checkbox** is used for a single option that the user can turn on or off.

Data Area: The part of every E-Com screen in which data is entered or viewed. The data area of the screen is always visible. Most of the work done in the E-Com system is done in the data area.

Database: The entire collection of information pertinent to the E-Com system. The information in the E-Com database is organized into separate files called tables, which are based on data type. In addition, the E-Com system contains a separate table that functions as a template for each special education form.

E-Com System Manager (ESM): The system operator for the E-Com system.

ESM: See "E-Com System Manager" above.

Field: A field is a component of a record. Each field stores one piece of data. Fields can store text, numbers, dates, times, or calculation results. Fields can take the form of a text box, a list box, a check box, or a radio button.

Find Mode: A User mode designed to help you locate one or more records in a particular table. Clicking a "Find" button takes you into find mode. See "Mode" in this glossary to find out how to change modes.

Layout: The arrangement of data fields, buttons, graphics, and other elements of a screen or printed document. Each table can have different layouts for different functions. A layout has one or more parts, such as a header, footer, and body.

Key field or 'Link': An arbitrary number, usually invisible to users, that links one table in the E-Com system database to another.

List Box: A field that contains a list box of data entry choices from which to choose. E-Com system list boxes have a text box above the list. If the entry you need is not on the list, E-Com will usually allow you to type in an entry.

Mode: The E-Com database gives you four interfaces (depending on access level) in which to work with data. They are browse mode, find mode, preview mode, and layout mode. Modes are shown in a pop-up window at the bottom of the table window and in the mode menu at the top of the screen. In both places, the current mode is marked. Simply click on one of the other modes to make a change.

PDF: A computer based document format, abbreviation for 'Public Document Format'. Virtually all personal computers can view PDF documents, though not all can create them. It is a very common document format for sharing documents with other computer users.

Preview Mode: A User mode that shows you what the page will look like when printed. See "Mode" in this glossary to find out how to change modes.

Portal: A list of data from the related table that appears in a record. Examples are the list of forms that appears on the right side of the Student Data Entry screen, or the list of students that appears on the right side of the Staff Data Entry screen. Data shown in a portal comes from a different, related table.

Radio Button: See "Button."

RCW: The Revised Code of Washington, the state statutes that govern Washington State. You will find references to RCW chapters and sections in the WAC table.

Relational Database: A database made up of more than one table that can be used together to provide information needed by users. Although each piece of data is entered once and stored in one table in the database, the construction of the database allows users to access that data from other tables. If the data in the original table changes, all other appearances of that data will change.

Record: All the information about one subject in the E-Com database. For example, the information on a particular student that appears on the Student Data Entry screen is that student's record.

Screen: An area in which users can view, search for, or change data pertaining to a particular topic (students or schools, for example). The interface mask acts as a guide for working with data. Please note that the data shown on a particular screen may not all be stored in the same table (see Portals).

Script: A sequence of one or more written commands that automate E-Com system actions or tasks. Scripts direct the actions that result from clicking buttons in the E-Com system. Additional scripts can be accessed by clicking on the Script menu.

Status Area: The gray area to the left of each screen that shows the number of records, and whether the records are sorted or unsorted. When in browse mode, the flip cards at the top of the status area allow you to move back and forth from one record to another. In find mode, the box displays all find options as well as the number of records in the found set.

Table: A subset of the data in the E-Com database. The tables contained in the E-Com database are discussed in "E-Com system Components". Another name for a table is file.

Text Box: A field that appears as an empty box on the screen, into which information can be typed. Some text boxes are equipped with list boxes from which you can select the correct entry.

User or **End User:** A special education teacher, psychologist, assistant, or special education administrator who has or should have access into the E-Com system. Please note that not everyone listed in the Staff table is a User.

WAC: The Washington Administrative Code, the code of state regulations that governs Washington State.

WSIPC Data: Data on special education participants compiled by the Washington School Information Processing Co-operative (WSIPC). Updates to WSIPC data are imported into the E-Com system by the ESM.