

SELPA Manager Administrator's Guide to Preferences

Topic: Administrative Preferences
Audience: Administrators
Date: 10.20.2009 (Rev. 10.30.2009)
Reference: TN200910-1

Table of Contents

TABLE OF CONTENTS	2
INTRODUCTION.....	5
SELPA INFORMATION (TAB 1).....	6
1. SELPA (DROP-DOWN LIST)	6
2. SITE NUMBER	7
3. SCHOOL / DISTRICT NAME	7
4. YOUR NAME	7
5. COUNTY CODE.....	7
6. LEA CODE.....	7
7. ADDRESS, CITY, STATE, POSTAL CODE	8
8. PHONE / FAX (2 AREAS, EACH WITH A BUTTON)	8
9. ALT. DISTRICT OF SERVICE, CASEMIS TABLE A (CHECK BOX)	8
10. SERIAL NO. (BUTTON)	8
11. UPDATE LICENSE (BUTTON)	8
12. 4D LICENSES (BUTTON)	9
13. SSL (BUTTON)	9
SYSTEM 1 (TAB 2)	10
1. REPORT AS OF (DATE, COMBO BOX).....	10
2. AGE CALCS. FM. (DATE)	10
3. NO AS OF WARNINGS	11
4. EARLIEST ALLOWED DATE / LATEST ALLOWED DATE (2 AREAS)	11
5. NO START DATE MATCH ON STDNT SERVICES.....	11
6. NO AGE-RELATED ERROR CHECKING WHEN: EDITING AN EXISTING STUDENT/IEP/SERVICE	12
7. NO AGE-RELATED ERROR CHECKING WHEN: ADDING A NEW STUDENT/IEP/SERVICE	14
8. 3 RD BIRTHDAY ALLOWANCE FOR 2 YR OLDS (XX) MOS. BEFORE	14
9. LISTS SUBSECTION, EDIT (BUTTON AND DROP-DOWN LIST)	14
10. [P]RINT USER LISTS (BUTTON).....	17
11. WRITE CASEMIS CODES (BUTTON)	17
12. FORMS CLOSET (BUTTON)	18
13. GOALS/OBJECTIVES (BUTTON)	18
14. MEDICAL PROVIDER NO.	19
15. DEFAULT DIST. OF RES. CODE	19
16. MAX. NUMBER OF SCHOOLS / TEACHERS IN DROP-DOWNS (WINDOWS WORKSTATIONS ONLY)	19
17. AUDIT TRAIL	19
18. BATCH OPERATIONS ADMIN ONLY	20
19. BROWSE DELETE ADMIN ONLY	20
20. CALPADS WARNINGS.....	20
21. CASEMIS ADMIN ONLY	21
22. DISC. ACTION REQUIRES SCHOOL/DISTRICT	21
23. EDITABLE SSID	21
24. IMPORTS 'ADMINISTRATOR' ONLY	21
25. MORE TRANSPORT-ONLY FIELDS	21
26. NO %ORC WARNINGS/ERRORS	22
27. "OTHER" DISTRICT REQUIRED.....	22
28. RIS DEFAULT	22
29. SHARED SCHOOL CODES	22
30. STUDENT ID FOR CASEMIS.....	22
31. TRANSFER ANY LISTED STUDENT	22
32. TRANSPORT ALERT	23
33. CONTACT DEFAULT ADDRESS TYPE (COMBO BOX)	23

34. CONTACT DEFAULT RELATIONSHIP TYPE (<i>COMBO BOX</i>)	23
SYSTEM 2 (TAB 3)	24
1. LIMIT STUDENT SERVICES TO ACTIVE TEACHER ASSIGNMENTS	24
2. REQUIRE EITHER DURATION AND FREQUENCY (OTHER); OR DURATION AND SESSIONS PER WEEK FOR NON-INFANT, NON-MHS SERVICES STARTING ON/AFTER (<i>DATE</i>)	24
3. WHEN CHECKING THE PRIMARY BOX FOR A STUDENT SERVICE, SHOULD THE STUDENT'S CASE MANAGER BE UPDATED? (<i>COMBO BOX</i>)	25
4. DEFAULT PROVIDER TYPE (<i>COMBO BOX</i>)	25
5. DEFAULT LOCATION TYPE (<i>COMBO BOX</i>)	25
6. BENCH DATES FM CALENDAR (DESC. "IEP5...")	25
7. NO DATE POP-UPS	25
8. NO NON-DATE POP-UPS	25
9. NO PREFIX OR SUFFIX ON GOALS/BENCHMARKS	26
10. OMIT GOAL/BENCHMARK NUMBERING	26
11. WHEN A USER CHANGES HIS/HER PASSWORD, REQUIRE: [XX] CHARACTERS MINIMUM LENGTH (RANGE 0-30)	27
12. ALPHA AND NUMERIC CHARACTERS	27
13. UPPER AND LOWER CASE	27
14. MODEM DIALING PARAMETERS (DIALING PORT, DIALING PREFIX, LONG DISTANCE PREFIX, LOCAL AREA CODE)	27
WEB AND MULTI-USER (TAB 4)	28
1. FORM TO USE FOR NEW IEPs (<i>DROP-DOWN MENU</i>)	28
2. FORM TO USE FOR NEW IEPs ON WEB (IF DIFFERENT) (<i>DROP-DOWN MENU</i>)	29
3. ALT TAB ORDER (<i>DFL2 FORM SET</i>)	29
4. MEDICAL SIGNATURE LINE (<i>DFL2 FORM SET</i>)	30
5. PARENT CAC BOX FORMS 6A/6B (<i>DFL6 FORM SET</i>)	30
6. SIMPLIFIED SECTION 4 (<i>DFL6 FORM SET</i>)	30
7. LEFT FOOTER (PRINTED FORMS) (<i>DFL6 FORM SET</i>)	31
8. OPTIONS (BUTTON) (<i>DFL3 FORM SET</i>)	31
9. OPTIONS (BUTTON) (<i>DFL4 FORM SET</i>)	32
10. OPTIONS (BUTTON) (<i>DFL5 FORM SET</i>)	33
11. OPTIONS (BUTTON) (<i>DFL6 FORM SET</i>)	34
12. INITIAL LISTS, WEB: STUDENTS	36
13. FLAGS (<i>BUTTON</i>)	37
14. INITIAL LISTS, WEB: IEPs	38
15. ADD STUDENT WITH IEP ON WEB	38
16. ATTACHMENTS ON WEB	38
17. ASSISTIVE DEVICES DEFAULT	39
18. CASE MANAGER PRINT	39
19. CASELOAD PROVIDER HIDE	39
20. DROPS ON WEB	39
21. DUPLICATE IEPs ON WEB	39
22. CONFIRM BEFORE DUPLICATING	40
23. EDIT STUDENT (MIS) IEP NOTICE ON WEB	40
24. FEWER SCHOOLS IN DROP-DOWNS	41
25. HOME PAGE, MAX RECS TO LIST	41
26. 'IND/GRP/ST' HIDE	42
27. MARK NEW IEPs INCOMPLETE	42
28. MY CURRENT STATS ON WEB	42
29. NO "NEW GOAL FOR..."	42
30. NO SIG LINE NAMES	43
31. SPECIAL ED ELIGIBLE DEFAULT	43
32. SERVICE CONSULT HIDE	43
33. SPECIAL PRT ESY SERVICES	43

34.	SSN HIDE ON IEP FORM	43
35.	STUDENT-REQUIRED FIELDS	43
36.	SVCS AT SCHOOL OF RES DEFAULT	44
37.	ALLOW DROPS ON IEPs ON/AFTER (<i>DATE</i>)	44
38.	WEB HOLDS: RELEASE AFTER (<i>NUMBER</i>) MIN	44
39.	WEB HOLDS: RELEASE ALL (<i>BUTTON</i>)	45
40.	DISABLE HOLDS	45
41.	WEB STUDENT ACCESS (TEACHERGrp, READWRITEGrp, ADMINGROUP CAN EDIT)	46
42.	NOTICES: LOGON (<i>BUTTON</i>)	46
43.	NOTICES: WEB PAGE (<i>BUTTON</i>)	46
44.	NOTICES: INSTANT (<i>BUTTON</i>)	46
45.	AUTO-REFRESH BROWSE WINDOW AFTER (<i>NUMBER</i>) SECONDS	46
46.	PREVENT USER LOGINS AFTER (<i>TIME OF DAY</i>) FOR A DURATION OF (<i>MINUTES</i>)	47
47.	TIME OUT IDLE WEB CONNECTIONS AFTER (<i>NUMBER</i>) MINUTES	48
48.	ACCESS RESTRICTIONS (<i>BUTTON</i>)	48
49.	PRINT TO PDF TIME OUT (<i>SECONDS</i>)	48
50.	PDF995 ADDITIONAL WAIT TIME (<i>SECONDS</i>)	48
51.	SEMAPHORE WAIT TIME (<i>SECONDS</i>)	48
52.	SSL WEB CONNECTIONS ONLY	49
53.	DISABLE WEB PRINT WORKSTATION AFTER (FAILURES)	49
54.	WEB CACHE INFO (<i>BUTTON</i>)	49
55.	CLEAR HTML FOLDER (<i>BUTTON</i>)	49
IEP NOTICE DEFAULTS (TAB 5)		50
APPEARANCE (TAB 6)		52
1.	INTERFACE (DROP-DOWN MENU)	52
2.	SCALE FORMS (0-100%)	53
3.	MAX RECENT ITEMS (0-50)	53
4.	BROWSE FONT (6-20) (<i>DROP-DOWN MENU PLUS NUMERIC ENTRY AREA</i>)	53
5.	BROWSE WINDOW INITIALLY DISPLAYS (<i>DROP-DOWN MENU</i>)	53
6.	OPTIONAL BROWSE FIELDS: STUDENTS (<i>BUTTON</i>)	54
7.	OPTIONAL BROWSE FIELDS: ASSESSMTS (<i>DROP-DOWN MENU</i>)	55
8.	ADD NEW RECORD LOOP	55
9.	ALTERNATE ROW BANDING	55
10.	DON'T GUESS AC PREFIX	55
11.	NO BROWSE WINDOW	56
12.	NO SPELLING (<i>4.75 VERSIONS ONLY</i>)	56
13.	NO STYLED BROWSE TEXT	56
14.	NO TOOL TIPS	56
15.	SORT BROWSE LISTS (<i>CHECK BOX AND EDIT BUTTON</i>)	57
16.	MAX RECS TO LIST (0-300) (<i>WEB</i>)	57
17.	NO STUDENT COLOR KEY (<i>WEB</i>)	57
18.	ITEMS FROM LAST IEP	57
19.	INITIAL HOME PAGE - DISPLAY (QUERY) - SORT ORDER (<i>WEB, 2 DROP-DOWN MENUS FOR STUDENT/UPPER LIST, 2 DROP-DOWN MENUS FOR IEP/LOWER LIST</i>)	58
20.	CONTACTS TO COPY: MAIN – SECOND (<i>2 COMBO BOXES</i>)	58
21.	STUDENTS: IN THE BROWSE WINDOW, SHOW (<i>DROP-DOWN MENU</i>)	58
22.	STUDENTS: TRANSPORTATION ONLY	59
23.	STUDENTS: STUDENT'S AGE TODAY	60
24.	STUDENT SERVICES: BROWSE LIST (<i>RADIO BUTTONS AND DROP-DOWN MENU</i>)	60
25.	STUDENT SERVICES: ALTERNATE DATA ENTRY FORM	61
26.	TEACHERS - STAFF: BROWSE LIST (<i>RADIO BUTTONS</i>)	61
27.	LOGO (<i>"LOAD" BUTTON AND ENTRY AREA, ADMINISTRATIVE ACCESS ONLY</i>)	62

Introduction

The administrative preferences dialog contains many of the options and other settings that are used to configure SELPA Manager for a particular SELPA or district.

Most of these options affect multiple users, both within 4D Client and using the web interface of SELPA Manager. Consequently, only users with administrative access (belonging to the “AdminGroup” user access group) can access this dialog.

Other preference dialogs are available to users with lower-level access. These dialogs contain a subset of the items on the administrative preferences dialog. The editable items on these dialogs affect only the user who is accessing them.

This document is an update to the information presented in Chapter 4 of the SELPA Manager Program User's Guide.¹ The user's guide provides more thorough information for some of the settings, including step-by-step instructions for SSL certificate requests and for serializing your copy of the program. It is a useful supplement to the information presented here.

The administrative preferences dialog includes six tabs,

- SELPA information
- System 1
- System 2
- Web and multi-user
- IEP notice defaults
- Appearance

These tabs appear as separate sections of this document, starting below with the SELPA Information tab.

¹ *SELPA Manager Program User's Guide, 4.75x Versions*. Revision 2.10.2006. Chapter 4, “Configuring SELPA Manager”. On SELPA Manager web site: www.ladue.com; Reference; Manuals; “SELPA Manager Help (update through Chap. 5, last rev. 2.10.2006)”.

SELPA Information (Tab 1)

This tab (Fig. 1) contains the basic site name, address and number settings needed to differentiate this copy of SELPA Manager from other copies. It also provides a mechanism to register the program by obtaining a serial number from technical support, and to expand the number of simultaneous users (for multi-user editions of SELPA Manager).

Fig. 1. SELPA Information (Tab 1)

1. SELPA (drop-down list)

Selects the code and name corresponding to the SELPA/region in which this copy of SELPA Manager is located. You specify this item when first opening the program, in the “Welcome to SELPA Manager” dialog.

When the SELPA is selected, the program will place a county code (the first 2 digits of the 4-digit SELPA code) into the County code field, provided that this area is still empty. For example, the county code should be “37” for SELPA 3700. However, if the digits “27” were already in the County code field, the program would not overwrite them.

The SELPA setting can determine the forms that are available for creating new IEPs, and affects certain other functions, such as printing IEP verification forms. Changing the SELPA setting on an existing installation will cause the program to ask for a new serial number, when you next start the program.

2. Site number

The program administrator assigns a site number ranging from 1 and 9999 to each installation of SELPA Manager within the SELPA/region. The site number is the suffix for the record number, when a user adds a new student.

No two copies of SELPA Manager can have the same site number. Two or more installations with the same site number could issue the same record number to different students, creating uniqueness errors, incorrect service associations, and/or incorrect demographic information, when a student record is transferred from one installation to another.

If you change the site number after you have entered students into the program, then (upon closing/saving the preferences dialog) the program will offer to update all student record numbers that have the previous site suffix. If you are changing the site number to remove a conflict with another installation of SELPA Manager, *and* no students have yet been exported, then you should allow the program to make this change.

Changing the site number on an existing installation will cause the program to ask for a new serial number, when you next start the program.

3. School / district name

This item is the SELPA region name, a district name, a school/site name, or other identifying information about the installation. Initially, if this field is blank, the program inserts the SELPA region name as you select it from the drop-down list. However, you can instead substitute a more appropriate name for your site (e.g., "Pennyhill School", "Amber Unified School District", "Maxwell County Office of Education", etc.).

Changing the school / district name on an existing installation will cause the program to ask for a new serial number, when you next start the program.

4. Your name

The person who will serve as the principal administrator for this installation of SELPA Manager. This name is not used in program serialization, but does appear in Annual Service Plan reports.

5. County code

The two-digit numeric code corresponding to the county in which this copy of SELPA Manager is installed. The program will insert this code automatically as the SELPA is selected. This item is used in the header of SELPA Central exports, as an identifier.

6. LEA code

The Local Educational Agency (LEA) 7-digit code. Used in CALPADS exports for the Reporting LEA.

7. Address, City, State, Postal Code

There are two data entry areas for the street and/or mailing address, plus areas for city, state, and postal code.

8. Phone / Fax (2 areas, each with a button)

Telephone and fax numbers for the site, including the area code (10 digits). Do not use punctuation or telephone extension numbers in these entry areas. Press the button to clear the telephone number and associated formatting from the entry area.

9. Alt. district of service, CASEMIS Table A (check box)

Checking this box instructs SELPA Manager to use the first seven digits of each student's record number as the district of service, when generating the CASEMIS and DRDP reports (exports).

Normally, when this preference box is *not* checked, the program determines the district of service from the school associated with the student's current, CASEMIS-reportable primary service.

This setting may be useful if your SELPA maintains a separate, special education district that provides special education services for the other districts in the SELPA.

This setting can be overridden by checking the box, "LEA district as dist. of service" on the CASEMIS report dialog.

10. Serial No. (button)

Press this button when you are ready to license (serialize) the program. You may use the program on a trial basis with no restrictions, for up to 90 days. Within 30 days of expiry, the program will warn you on start-up that the program will need serialization. At the end of the trial period, you must enter a serial number at program start-up.

Detailed instructions for serializing appear in Chapter 4 of the user's guide.² Once you have entered the serial number, you won't need to re-enter a serial number unless: (1) the SELPA code or site code is changed; (2) the school/district name is changed; (3) you wish to add more simultaneous users to a multi-user installation.

This button will be dimmed if the program is already licensed.

11. Update license (button)

Press this button when you have a licensed copy of the program, but need to add more simultaneous 4D Client users. You might need to perform this task after purchasing an expansion pack of 4D Client licenses.

This setting does not apply to web users, whose access is not presently limited by the number of simultaneous users.

² *SELPA Manager Program User's Guide*, p. 247.

12. 4D Licenses (*button*)

Displays a dialog indicating the 4D license numbers that are installed. This button is disabled for multi-user editions, and presents only limited information for the single-user runtime edition. Its purpose is to provide 4D serial number access for a multi-user edition when used with the 4th Dimension application, rather than the 4D Server application.

13. SSL (*button*)

Press this button to enter web registration information for a certificate signing request, to obtain a Secure Sockets Layer (SSL) certificate from an issuing authority.

The certificate and associated items enable SELPA Manager's web server to run under SSL encryption. A user attempting an <https://> (secure) web connection to the server can then see the "lock" icon on their web browser.

Detailed instructions for generating the certificate signing request are in Chapter 4 of the user's guide.³

³ *SELPA Manager Program User's Guide*, p. 250.

System 1 (Tab 2)

This tab contains system-wide, date-related preferences; general parameters; and choice lists (Fig. 2). Except as noted, changing the parameters on this tab will affect all program users on multi-user installations. However, other users who are presently connected to the server may not notice any change until the next time that they connect to SELPA Manager.

Fig. 2. System 1 (Tab 2)

1. Report as of (date, combo box)

The next scheduled reporting date for the CASEMIS report (the “As Of” date). A comparison between this date and student service start/stop dates partly determines whether or not a student record will appear in the CASEMIS report.

The As Of date also affects whether or not certain codes can be used for student demographics, as the CDE revises the code lists periodically. Older codes which appear in a student record may be italicized, to indicate that the code is not consistent with the system As Of date.

2. Age calcs. fm. (date)

The date from which the student’s age is calculated, for student records. If this date is not specified (“00/00/0000”), then SELPA Manager will use the Report As Of date for this purpose.

If you change the existing Report As Of date, then SELPA Manager will also change the "Age calcs. fm." date to correspond with the Report As Of date. You can then reset the "Age calcs. fm." date to some other date, if desired.

If the "Age calcs. fm." date has changed, then when you save changes and close the administrative preferences dialog, SELPA Manager will ask whether it should recalculate student ages and (where appropriate) remove infant- or preschool-related information, for consistency with the students' revised ages.

3. No As Of warnings

When checked, this box prevents error and warning messages related to the Report As Of date from appearing in the missing/problem items list, on the student and assessment data entry forms (4D Client). The messages (for student records) include,

- E510 Infant referral date after report date
- WNG: E108 Non-CASEMIS report date
- WNG: E114 DOB after report date
- WNG: E127 Entry after report date
- WNG: E151 Exit before report date.
- WNG: E154 Exit before start acad year.
- WNG: E161 Referral after report date
- WNG: Last eval > As Of date
- WNG: Last eval >= 3 yr fm As Of
- WNG: Last IEP > As Of date
- WNG: Last IEP >= 1 yr fm As Of date

This option can be set by each user individually, provided that s/he has 4D Client access to SELPA Manager.

4. Earliest allowed date / Latest allowed date (2 areas)

These items assist in preventing typographical errors while entering dates, by establishing program-wide lower and upper limits. For example, if you mistakenly entered a student's birth date as 6/18/1889 instead of 6/18/1989, and you had an earliest allowed date of 1/1/1972, then the program would not allow you to move to the next student field until you corrected the date.

Even if you elect to leave these date limits blank, however, the program will still provide a warning if a date is more than 30 years distant from the current date. In this case, however, the program does not prevent you from making the entry.

5. No start date match on stdnt services

Normally, when performing a SELPA Central import, SELPA Manager uses the following criteria to identify a student service record that already exists:

- Student record number
- Service start date
- CASEMIS service code
- Date of service record creation
- Time of service record creation

If the sender changes the start date of the service record, and then re-exports the service, then the importing copy of SELPA Manager will contain two records for the same service.

To prevent this problem from occurring, the SELPA Central import routine can omit the service start date from the record-matching criteria. The program will then update the existing copy of the service with the revised start date.

6. No age-related error checking when: Editing an existing student/IEP/service

Checking this preference will cause SELPA Manager to ignore alert, error, and warning messages that are based upon a calculation of the student's age, for existing student, IEP, and student service records. Age-related messages when editing a student record (within 4D Client⁴) include,

- E136 Grade 13 for age<16
- E137/E138 Grade xx for age yy (*3+ years under or over*)
- E139 Age (>3) for infant
- E140 Grade is preschool for age (not 2-7)
- E141 Grade kindergarten for age (<3)
- E142 Grade kindergarten for age xx
- E156 Graduating (Codes 71-72-81) at age (<16)
- E157 Stdnt age<21 for exit 73 (max age)
- E164 Fed presch set missing
- E165 Fed presch set < 3 yrs
- E166 In reg class not 0-100%
- E181 Infant set missing < 3 yrs
- E193 Fed infant set missing age < 2
- E194 Fed school set missing age 6-22
- E196 Transition goal (1-4)
- E501 Consent date
- E502 Initial evaluation date
- E503 Referral date
- E504 Infant referred by
- E505 Infant consent date
- E506 Infant init eval date
- Can't assign this service to a non-infant student (*alert only*)
- Can't assign this service to an infant (*alert only*)
- Consent delay reason
- Fed school setting < 5 yrs
- Infant consent date
- Infant referral date
- Infant referred by
- Infant w/o 21-22-23 svc
- Infant w/o init eval date
- Not an infant service
- Preschool set > 5 yrs

⁴ A subset of the 4D Client error messages appears when editing a student record on the web.

- Preschool setting < 3 yrs
- Presch set missing 3-5 yrs
- Referral date
- Referred by
- Solely low incid > 2 yrs
- STAR=30 Gr 15 age <7
- STAR=90 Gr 15 Age 7-16
- STAR#10-40 Gr 15, 7-17 yr
- Svc (xx) Agency for non-infant
- Svc (xx) Infant svc < 10 min
- Svc (xx) Infant svc at drop no pvdr type
- Svc (xx) Infant svc w/o agency code
- Svc (xx) Infant svc w/o freq code
- Svc (xx) Infant svc w/o location code
- Svc (xx) Infant svc w/o pvdr type
- Svc (xx) Infant w/non-infant service
- Svc (xx) Non-infant invalid service
- Svc (xx) Non-infant w/location
- WNG: Age not 1-22 (CALPADS)
- WNG: Age not 18-79 for grade AD (CALPADS)
- WNG: CAHSEE=90 Gr 15 Age 15+
- WNG: Fed infant setting > 2 yrs
- WNG: Fed presch set next yr
- WNG: Fed presch set > 5 yrs
- WNG: Fed school setting > 22 yrs
- WNG: Fed school setting next yr
- WNG: In reg class=0%, ages 3-22
- WNG: E (xx) Infant svc < 10 min
- WNG: E (xx) Infant svc at drop no pvdr type
- WNG: E (xx) Infant svc w/o agency code
- WNG: E (xx) Infant svc w/o freq code
- WNG: E (xx) Infant svc w/o location code
- WNG: E (xx) Infant svc w/o pvdr type
- WNG: E (xx) Infant w/non-infant service
- WNG: Svc (xx) Non-infant/non-MHS w/frequency
- WNG: Svc (xx) stdnt >22 yrs at drop
- WNG: Svc (xx) student >22 yrs w/svc
- WNG: Infant setting > 2 yrs
- WNG: Infant w/o 21-22-23 svc
- WNG: Infant w/o infant svcs
- WNG: No 3rd BD delay reason
- WNG: No tran svc lang 14+ yrs
- WNG: Referral date > 2 yrs
- WNG: STAR=90 Gr 15 Age 7-16
- WNG: Tran. goal(s) age < 15
- WNG: Trans mtg date > 2 yrs
- WNG: Type 00 sch age 0-5 only

7. No age-related error checking when: Adding a new student/IEP/service

Checking this preference will cause SELPA Manager to ignore alert, error, and warning messages that are based upon a calculation of the student's age, for *new* student, IEP, and student service records.

8. 3rd birthday allowance for 2 yr olds (xx) mos. before

This item enables you to specify a number of months' leeway into the future, in determining the date on which a child becomes three years of age.

For example, if the Report As Of date is 6/30/2009 and the child will turn three on 9/12/2009, then a 3rd birthday allowance of 3 months would allow the child to have non-infant services on the Report As Of date. Similarly, this setting would eliminate the infant referral date, infant consent date, and infant initial evaluation date requirements.

9. Lists subsection, Edit (*button and drop-down list*)

Clicking on this button allows you to customize one or more lists of items in SELPA Manager. These lists appear as choices for data entry, in various places in the program.

Select the name of the list that you wish to edit from the drop-down, and then press the Edit button. A dialog appears, displaying the custom items for the selected list.

If there are *no* contents, then the program will use default values that are built into the program. As long as at least one item displays in the dialog, the default values will not appear as choices in the program.

If you perform an [ALT/OPTION]-click on the Edit button, then SELPA Manager will offer to export the items in the selected list to a file on disk. This file can then be imported into another SELPA Manager installation (Choice list items import).

Some of the lists are unique to particular SELPAs and/or IEP form sets (e.g., "ITP activities 3013"); but others apply to all installations (e.g., "Aux service code").

Some of the editable lists include,

- **Aux service code:** "Aux. code" drop-down menu, student services data entry form.)
- **Calendar item class:** Object classification drop-down menu, browse window Calendar.
- **Disability severity:** "Severity" drop-down menu, to describe the severity of the primary disability.
- **Gen ed academic areas:** "Academic Areas" drop-down menu, Form IEP 2 of the 4100/San Mateo IEP form set.
- **Gen ed non-academic areas:** "Non-Academic Areas" drop-down menu, Form IEP 2 of the 4100/San Mateo IEP form set.
- **Handicapping condition:** "Disab. cond." drop-down menu, student service data entry forms.
- **IEP 3703 behav interv:** Drop-down menu on the Special Factors page, 3703 IEP form set, "If yes, specify positive behavior interventions, strategies, and supports".

- **IEP 3703 ELL needs:** Drop-down menu on the Special Factors page, 3703 IEP form set, “If the child is an English Language Learner, consider the language needs of the child as those needs relate to the IEP”.
- **IEP 3703 goal progress:** Three drop-down menus indicating progress toward goals. Annual Goals page, 3703 IEP form set.
- **IEP 3703 goal source:** Drop-down menu indicating the source of the goal. Annual Goals page, 3703 IEP form set.
- **IEP 3703 how disab affects:** Drop-down menu adjacent to the label, “Describe how student's disability affects involvement and progress in the general curriculum (or for preschoolers, participation in appropriate activities)”. First page, 3703 IEP form set.
- **IEP 3703 no particp because:** Drop-down menu next to the label “because” (“Student will not participate in the general education environment...”). Services page, 3703 IEP form set.
- **IEP 3703 not sch resid why:** Drop-down menu adjacent to the label, “All special education services provided at the student's school of residence?...(rationale)”. Services page, 3703 IEP form set.
- **IEP 3703 svc options:** Drop-down menu adjacent to the text field and label, “Services options considered:”. Services page, 3703 IEP form set.
- **IEP 3703 transition supp:** Drop-down menu beneath the check box and label, “Activities to support transition (e.g. preschool to kindergarten, special education and/or NPS to general education class, etc.)”. Services page, 3703 IEP form set.
- **IEP 75B4 11 empl:** Drop-down menu to the left of the *upper* text field in the Employment row, Measurable Postsecondary Goals (first) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 empl2:** Drop-down menu to the left of the *lower* text field in the Employment row, Measurable Postsecondary Goals (first) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 empl3:** Drop-down menu to the left of the *upper* text field in the Employment row, Transition Services & Activities (second) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 empl4:** Drop-down menu to the left of the *lower* text field in the Employment row, Transition Services & Activities (second) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 exper:** Drop-down menu to the left of the *upper* text field in the Community Experience/Training row, Measurable Postsecondary Goals (first) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 exper2:** Drop-down menu to the left of the *lower* text field in the Community Experience/Training row, Measurable Postsecondary Goals (first) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 exper3:** Drop-down menu to the left of the *upper* text field in the Community Experience/Training row, Transition Services & Activities (second) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 exper4:** Drop-down menu to the left of the *lower* text field in the Community Experience/Training row, Transition Services & Activities (second) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 indep:** Drop-down menu to the left of the *upper* text field in the Independent Living Skills row, Measurable Postsecondary Goals (first) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 indep2:** Drop-down menu to the left of the *lower* text field in the Independent Living Skills row, Measurable Postsecondary Goals (first) column, Individual Transition Plan, 75B4 IEP form set.

- **IEP 75B4 11 indep3:** Drop-down menu to the left of the *upper* text field in the Independent Living Skills row, Transition Services & Activities (second) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 indep4:** Drop-down menu to the left of the *lower* text field in the Independent Living Skills row, Transition Services & Activities (second) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 instruc:** Drop-down menu to the left of the *upper* text field in the Instruction/Education row, Measurable Postsecondary Goals (first) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 instruc2:** Drop-down menu to the left of the *lower* text field in the Instruction/Education row, Measurable Postsecondary Goals (first) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 instruc3:** Drop-down menu to the left of the *upper* text field in the Instruction/Education row, Transition Services & Activities (second) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 instruc4:** Drop-down menu to the left of the *lower* text field in the Instruction/Education row, Transition Services & Activities (second) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 other:** Drop-down menu to the left of the *upper* text field in the Other row, Measurable Postsecondary Goals (first) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 other2:** Drop-down menu to the left of the *lower* text field in the Other row, Measurable Postsecondary Goals (first) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 other3:** Drop-down menu to the left of the *upper* text field in the Other row, Transition Services & Activities (second) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 other4:** Drop-down menu to the left of the *lower* text field in the Other row, Transition Services & Activities (second) column, Individual Transition Plan, 75B4 IEP form set.
- **IEP 75B4 11 transSvcs:** Drop-down menu to the left of the text field and below the label, “Transition Services and/or Agency Partners”, Individual Transition Plan–Page 1, 75B4 IEP form set.
- **IEP 909E trnsptElgblty:** Drop-down menu *below* the Transportation check box and description, Educational Setting form, 909E IEP form set.
- **IEP DFL5 miscNote1:** First drop-down menu, just beneath the Original SpEd Entry Date, top right section of IEP-1 form, DFL5 form set.
- **IEP DFL5 miscNote2:** Second (smaller) drop-down menu, just beneath the Original SpEd Entry Date, top right section of IEP-1 form, DFL5 form set.
- **IEP DFL6 miscNote1:** First drop-down menu, just beneath the Original SpEd Entry Date, top right section of IEP-1 form, DFL6 form set.
- **IEP DFL6 miscNote2:** Second (smaller) drop-down menu, just beneath the Original SpEd Entry Date, top right section of IEP-1 form, DFL6 form set.
- **ITP activities 3013:** Five drop-down menus at the top of the Activities columns (Instruction, Community Experiences, Development of Employment and Other Post-School Adult Living Objectives, Daily Living Skills, and Related Areas). Greater Anaheim SELPA Individual Transition Plan form (SELPA 3013).
- **Non-primary drop:** Codes and corresponding reasons for dropping non-primary student services. For student data entry, student service data entry, and IEP forms that have service data entry areas.

- **Other review desc:** Drop-down menus adjacent to the “Other 1” and “Other 2” dates/labels, Dates tab, Student data entry form.
- **Service exclusions:** CASEMIS service codes that the program should prevent the user from specifying, when creating a new service for a student.
- **ST_noteSpecial:** Drop-down menu appearing at the upper right of each page, Student data entry form.
- **Suppl aid-service:** Drop-down menu for selecting the aid/service, in supplemental aids and services lists, IEP data entry forms, typically on the Services page of the form set. Used in 0115, 3702, 3703, 5700, 909E, 909F, DFL2, DFL3, DFL4, DFL5, and DFL6 form sets.
- **SVC_duration:** Drop-down menu on student service data entry forms, providing a textual description of the duration over which the service is to be provided (e.g., “30 days”, “60 days”, etc.). On the non-web form the label is “Dur. desc.”.
- **SVC_frequency:** Drop-down menu on student service data entry forms, providing a textual description of the frequency with which the service is to be provided (e.g., “per day”, “per wk”, etc.). On the non-web form the label is “Other freq.”.
- **Teacher title 2:** Drop-down menu on the teacher data entry form, labeled “Title 2”, for entering an alternate job title for the teacher/staff member.
- **Transport aux boxes:** This list enables you to indicate which of ten user-defined check boxes will appear at the bottom of the Special Education Placement and Transportation (“transportation-only”) form, which can be displayed instead of the standard data entry form for students.⁵ The “More transport-only fields” box must also be checked for the boxes to appear.⁶ The labels (names) for these boxes can be set on the “User Y/N” tab of the student data entry form (the location of these ten check boxes on the standard student data entry form).
- **User_alpha_21, User_alpha_22:** Contents for the drop-down lists that appear on the “User A2” tab of the student data entry form, Fields 21 and 22.

10. [P]rint user lists (button)

Clicking on this button enables you to design or load a Quick Report template that will print items in the [Choice_list] table. The [Choice_list] table contains custom user lists, the goals/objectives palette contents, information about which IEP tabs to hide (DFL3, DFL4, DFL5, and DFL6 form sets), and other items. Initially, the information is sorted by list name.

11. Write CASEMIS codes (button)

Clicking on this button generates a delimited text file on disk that contains codes and short descriptions for various CASEMIS fields:

- Agency (infant services)
- Disability (2006-2007)
- Disability (2005-2006)
- Disciplinary codes (reason)
- Discipline status
- Drop reason
- Ethnicity (3-digit codes)

⁵ Individual users can select the transportation-only form by checking “Transportation only” on the Appearance tab (Tab 6, see below). A discussion of the form itself appears in the user’s guide, p. 412.

⁶ The “More transport-only fields” box is also on the System 1 tab (see below).

- Ethnicity / Race (2009-2010)
- Federal setting (infant)
- Federal setting (preschool)
- Federal setting (preschool 2007-2008)
- Federal setting (preschool 2009-2010)
- Federal setting (school)
- Frequency (2006-2007)
- Grade level
- Graduation plan
- Hispanic indicator (2009-2010)
- Infant location
- Infant setting (2002-2003)
- Infant setting (2001-2002)
- Language
- Participation (2006-2007)
- Participation (2003-2004)
- Participation (12.1.2002)
- Participation (before 12.1.2002)
- Plan type (2007-2008)
- Plan type (2006-2007)
- Plan type (2005-2006)
- Post-secondary employment
- Post-secondary employment (2007-2008)
- Post-secondary program
- Preschool setting
- Provider type (student service)
- Referred by
- Residence
- Service (2006-07)
- Service (2005-06)
- Transition goal
- Transition service

12. Forms closet (*button*)

Clicking on this button causes the program to display a dialog of the blank (template) forms that are available in the “Forms Closet”, which is accessible from the home page of the web interface. You can add, remove, re-name, or retrieve Forms Closet templates.

(These forms are also available when editing an IEP within 4D Client, by pressing the “Other forms” button on the IEP.)

13. Goals/objectives (*button*)

Clicking on this button displays a palette of assessment goals and objectives for editing and review. This goals/objectives palette is employed in 4D Client when pasting goals and objectives into an IEP form or a student goal form. Additionally, the palette contents appear on the web goals and goals/objectives palette windows, when editing an IEP on the web. For more information on using the palette, refer to “Using the goals/objectives palette” in the user’s guide.⁷

⁷ *SELPA Manager Program User’s Guide*, p. 441.

14. MediCal provider no.

In this area, you can specify the Medi-Cal provider identification number for your SELPA. This program uses this number when exporting a selection of students to the state to determine Medi-CAL eligibility.

15. Default dist. of res. code

You can specify a 7-digit code as the default district of residence for new students.

If a default district of residence is not available, then SELPA Manager attempts to obtain the district of residence from the program user's "My District" designation.

If the program user has not designated a "My District", then the program obtains the district of residence from the record number prefix (selected when first opening a new student record).

A flow chart illustrating the logic for assignment of the district of residence and the student record number's district prefix appears in the user's guide.⁸

16. Max. number of schools / teachers in drop-downs (*Windows workstations only*)

When set to a value other than zero, this item disables drop-down menus in editable lists containing schools or containing teachers, if the number of schools or teachers to be displayed in the drop-down exceeds the selected number. This setting applies to Windows workstations only, when running 4D Client.

In 4D Client on Windows only, when the number of schools or teachers exceeds the space available on your screen, the program draws an adjacent column of names. If the number of schools or teachers still exceeds the length of the second column, then the program draws a third column, and so on. For hundreds of choices, the program may completely fill the screen with list items.

By specifying a particular value like 200, if there are more than 200 teachers to display, then no drop-down will be available. The name of the school or teacher can still be entered, however, by double-clicking into the cell and typing the name (or the beginning portion of the name).

This item does not apply to Macintosh workstations, which do not experience the same issue with drop-down menus. Using a value of zero disables this item.

17. Audit trail

Checking this box will enable field-level auditing of all changes to existing records. Users with administrative or transportation group ("TransportGrp") access can view audit trail information by highlighting the record of interest in the browse window, and selecting "Audit trail..." from the Actions menu.

⁸ *SELPA Manager Program User's Guide*, p. 361.

For audit trail information to be useful, each program user must log in with their own user name, rather than users sharing login names.

Audit trail information can cause the size of the data file to grow rapidly, as each change to each field in a record becomes a separate log entry. You may want to enable the audit trail when there is an issue that requires tracing, and then turn it back off again when the issue is resolved.

For additional information on viewing audit trail entries, consult the user's guide.⁹

18. Batch operations admin only

Checking this box restricts certain functions that affect multiple records from being executed by anyone who does not have administrative access to the program. Normally, these functions are available to users with read-write ("ReadWriteGrp") access. Most of these items appear in the Actions menu (4D Client). The functions include,

- Assign case manager
- Assign class...
- Assign school...
- Assign teacher...
- Change grade...
- Continue service...
- Copy-move transportation...
- Drop...
- Duplicates...
- Import... (File menu)
- Merge...
- Move to other year...
- Recalculate ages
- Transfer... (File menu)
- Update other...
- Update user fields...
- Updating student records with days elapsed and a note, when calculating compliance days, following the date of parental consent (Data menu, "Compliance timeline...")

19. Browse delete admin only

Checking this box restricts the deletion of records to users with administrative access. Normally users with read-write ("ReadWriteGrp") access can delete listed records from the browse window.

20. CALPADS warnings

Checking this box allows the program to present warning messages related to CALPADS submissions. Although other applications normally would be responsible for CALPADS data submission, SELPA Manager could be the source of the demographic information. Accordingly, the program can screen for possible problems, such as,

- Student names that exceed the CALPADS length restrictions

⁹ *SELPA Manager Program User's Guide*, p. 270.

- Lack of correspondence between CASEMIS and CALPADS grade levels
- Age – grade inconsistencies using CALPADS criteria
- National origin – province of birth inconsistencies
- School start and end date inconsistencies
- Completion status inconsistencies

21. CASEMIS admin only

Checking this box restricts the generation of CASEMIS reports to users with administrative access. Normally users with read-write (“ReadWriteGrp”) access can perform this function.

22. Disc. Action requires school/district

Checking this box causes the program to require that users enter a district and a school for disciplinary action records. Otherwise, these items are optional.

23. Editable SSID

Checking this box allows 4D Client users to revise an existing Statewide Student Identification Number (SSID) for a student. Normally, the SSID is read-only after a user has entered it and then saved the student record.

24. Imports ‘Administrator’ only

Checking this box restricts the importing function (File menu -> “Import...”) to the user named “Administrator” only. This option excludes other administrative users (with names other than “Administrator”), as well as users with lower-level access, from importing records.

25. More transport-only fields

Checking this box allows users to access additional information on the Special Education Placement and Transportation (“transportation-only”) form, which can be displayed instead of the standard student data entry form. Furthermore, if the standard student data entry form is being displayed, then this setting allows users with transportation-only (“TransportGrp”) access to edit most data entry areas on the Transportation tab, many of which would otherwise be read-only for them.

The additional information that the transportation-only form will display with this option includes the Do Not Report check box; an indication of the student’s current service status (“Drop on:”, display only); the bussing agency name; the transportation required check box; and up to ten of the user-defined, student yes/no check boxes. To have the yes/no check boxes appear on the form, the administrator must also select which of the ten will appear with the EDIT button.¹⁰

The areas of the transportation-only form which are now editable for “TransportGrp” users include the reason for the transportation request; transportation notes; IEP instruction boxes and POP type; and the pick-up and drop-off day columns in the list. The “TransportGrp” user can also add and delete pick-up and drop-off items from the list (the “+” and “-” buttons are enabled next to the list).

¹⁰ Refer to the discussion of “Transport aux boxes” under “Lists subsection, Edit”, above.

26. No %ORC warnings/errors

Checking this box will suppress warning messages that are related to the percent of time that a student is Outside of a Regular Classroom (%ORC). These warning messages would otherwise appear in the missing/problem items list, for student and assessment records, if the percent ORC is zero for a student in grades K-13 or of ages 6-22. A warning message also appears if a student outside of these grades or ages has a positive ORC value.

27. "Other" district required

"Other district" is a pair of fields on the Schools tab of the student data entry form. Checking this preference item makes entry of an "other" district mandatory, before the student record can be saved.

28. RIS default

If this box is checked, then new students (as they are added) are assumed to require intensive services (RIS).

29. Shared school codes

Checking this box allows more than one school to have the same school code. This feature may be useful if you have multiple "sub-sites" where services are provided, but which report to CASEMIS through a common school code. If this box is not checked, then SELPA Manager will require each record in the Schools section to have a unique code.

If the "Shared school codes" box is checked on a copy of SELPA Manager that is performing a SELPA Central import, then the program will attempt match the school records being imported with existing schools on both school name and school code. If the box is not checked, then the match will consider school code, but not school name.

30. Student ID for CASEMIS

When generating the CASEMIS reports, SELPA Manager normally uses the program-assigned record number ([Student]Record_number) for student identification ("STUDENT_ID" in CASEMIS). When this box is checked, the program will use the user-editable student number field ([Student]Student_number) instead.

Care should be exercised in checking this option, since the student number is not a required item for the student record.

31. Transfer any listed student

Checking this box allows users with read-write ("ReadWriteGrp") or higher-level access to transfer any student that s/he can view, in the browse window. Because users with this level of access can potentially view more students in the browse window than they are allowed to edit, some listed students are not normally available to them for a district-to-district or an internal transfer. Checking this box releases the restriction on transfer.

32. Transport alert

When this box is checked, SELPA Manager checks to see whether the school of the student's current primary service changes. This verification occurs when the user has finished editing the student record in 4D Client. If the school has changed, the program marks the "Alert" box on the Transportation tab of the Student data entry form.

33. Contact default address type (*combo box*)

This item establishes a default address type, when adding a new contact for a student. When the new contact record opens in its own data entry form, the selected address type should be listed.

34. Contact default relationship type (*combo box*)

This item establishes a default relationship type between the student and an associated, new contact. When a new contact record opens in its own data entry form, the selected relationship type should be listed.

System 2 (Tab 3)

Items on this tab affect student services, the goals and objectives palettes, password revisions, and modem dialing (Fig. 3). Some of these settings are for “legacy” items, which are less relevant to recent forms and/or to modes of connectivity.

Set system preferences (admin. user)...

SELPA information | System 1 | System 2 | Web and multi-user | IEP notice defaults | Appearance

Student services

☒ Limit student services to active teacher assignments

Require either duration and frequency (other); or duration and sessions per week for non-infant, non-MHS services starting on/after: 00/00/00

When checking the PRIMARY box for a student service, should the student's case manager be updated? [Dropdown]

Default provider type: [Dropdown]

Default location type: [Dropdown]

Goal / objective / benchmark

☐ Bench dates from Calendar (desc. "IEP5...") ☒ No date pop-ups ☐ No non-date pop-ups

☐ No prefix or suffix on goals/benchmarks ☐ Omit goal/benchmark numbering

Passwords

When a user changes his/her password, require:

characters minimum length (range 0-30)

☐ Alpha and numeric characters

☐ Upper and lower case

Modem dialing

Dialing port: [None] Long distance prefix: [1]

Dialing prefix: [] Local area code: []

v 4.75310 (serialized, 8 user(s))

OK Cancel

Fig. 3. System 2 (Tab 3)

1. Limit student services to active teacher assignments

If this box is checked, then a teacher must have an active (current) assignment in a particular service, at a particular school, before the teacher can be selected to provide the service to the student. Refer to the user's guide for additional details.¹¹

2. Require either duration and frequency (other); or duration and sessions per week for non-infant, non-MHS services starting on/after (date)

Using this option causes the program to require the following items for a non-infant service that is also not listed by CASEMIS as a mental-health service:

- Duration description ([Student_service]Duration);
- *One of the following:*
- The service frequency description ([Student_service]Frequency_other); or
- The number of sessions per week ([Student_service]Sessions_per_week)

¹¹ SELPA Manager Program User's Guide, p. 327.

To use this option, enter a starting date. Any non-infant, non-mental-health, student service that starts on or after this date will be subject to the requirement. Earlier services are exempt.

3. When checking the PRIMARY box for a student service, should the student's case manager be updated? (*combo box*)

This item instructs the program about whether the teacher providing the primary service for a student should also be entered as the student's case manager. This action would occur in 4D Client when the user checks the primary box for the service. The options in the menu are "Always", "Ask first", "Never", and "Only if unassigned". This item applies only to users with access to the full browse window in 4D Client ("TeacherGrp" and "ReadWriteGrp" or higher access group).

4. Default provider type (*combo box*)

This item establishes a default provider type, when adding a new student service in 4D Client. When the new service record opens, the provider type should be listed.

5. Default location type (*combo box*)

This item establishes a default location type, when adding a new student service in 4D Client. When the new service record opens, the location type should be listed.

6. Bench dates fm Calendar (desc. "IEP5...")

This option affects the dates that are displayed in a pop-up choice list. The choice list appears when the user clicks into a date field in 4D Client, on either the goals/objectives tab of an IEP, or in a freestanding goal data entry form.

If this preference box is *not* checked, then the dates that appear in the choice list represent a year's worth of dates into the future, beyond the current date. If this option *is* checked, then the program obtains the dates from Calendar item entries whose description begins with the word, "IEP5".

7. No date pop-ups

Checking this box will prevent pop-up choice lists from appearing when 4D Client users click into date fields on the goals/objectives tab of the assessment (IEP) form; and on the freestanding goal data entry form.

Note: Users with the ability to edit IEPs ("TeachetLtdGrp" access group and higher) can set this preference individually.

8. No non-date pop-ups

Checking this box will prevent pop-up choice lists from appearing when 4D Client users click into non-date fields on the goals/objectives tab of the assessment (IEP) form; and on the freestanding goal data entry form.

Note: Users with the ability to edit IEPs ("TeachetLtdGrp" access group and higher) can set this preference individually.

9. No prefix or suffix on goals/benchmarks

Checking this box prevents the program from making any additions or substitutions when it pastes goals and benchmarks from the goals/objectives palette into IEP goals.¹²

Normally, SELPA Manager will replace the “[date]” meta-character with the IEP meeting date plus one year¹³; and replace “[name]” with the student’s name. For example, if a benchmark were listed in the goals/objectives palette as,

`By [date], [name] will read at 30 words per minute for 10 minutes.`

Then the program would paste this benchmark as (e.g.),

`By 12.18.2009, Nancy will read at 30 words per minute for 10 minutes.`

If the “[date]” and “[name]” meta-characters are *not* present in the palette text, then the program will prefix the benchmark with the phrase “Will improve ability to”; and add a suffix to the benchmark of “, by ” [meeting date plus 1 year].

For example, if a benchmark were listed in the palette as,

`Read at 30 words per minute for 10 minutes.`

then the benchmark as pasted into the student goal record would be

`Will improve ability to read at 30 words per minute for 10 minutes, by 12.18.2009.`

When the “No prefix or suffix on goals/benchmarks” preference box is checked, then SELPA Manager will not perform these additions or substitutions to the palette goal or benchmark text. Instead, it will paste the text verbatim, as it appears in the palette.

You may want to enable this option if you have prepared a custom list of goals/objectives that you do not wish for the program to alter in any way. For detailed information on using the goals/objectives palette in conjunction with goal entry, refer to the user’s guide.¹⁴

10. Omit goal/benchmark numbering

Checking this box causes SELPA Manager to remove any leading numeric characters from the objective, goal, and benchmark text, before pasting the text into the goal form. For example, suppose that a benchmark item in the goals/objectives palette starts with the text,

`4.1.2.1 When given a booklet containing 10 pictures...`

¹² “IEP goals” in this context refers to either adding a goal within an IEP, or adding a freestanding goal (by selecting “New record”, when the browse window current focus is the goal list).

¹³ For freestanding goals, the date used is the current date plus one year.

¹⁴ *SELPA Manager Program User’s Guide*, p. 438.

Then if this preference box is checked, the text would be changed to,

`When given a booklet containing 10 pictures...`

This preference notwithstanding, if the “No prefix or suffix on goals/benchmarks” box (above) is checked, then the program would paste the original palette text without any modification.

11. When a user changes his/her password, require: [xx] characters minimum length (range 0-30)

The administrator can require program users to include a minimum number of characters in their password, even if the initially-assigned password contains fewer characters.

12. Alpha and numeric characters

When the user changes his/her password, the program will require that the new password contain both alphabetic and numeric characters, for additional security.

13. Upper and lower case

When the user changes his/her password, the program will require that the new password contain both uppercase and lowercase characters, for additional security. Checking this box will also check the “Alpha and numeric characters” box, if it is not yet checked.

14. Modem dialing parameters (dialing port, dialing prefix, long distance prefix, local area code)

These four parameters permit a modem-equipped computer to speed dial telephone or fax numbers from within SELPA Manager. To the left of most telephone and fax fields on data entry forms is a button; clicking on the button can dial the associated number.

This option affects only the particular logged-in user, and any other users that may subsequently connect to the server using the same login name. When the dialing port is set to “None”, the other three parameters are not available for data entry. This setting applies to, and can be set by, individual program users.

Note: Users can set these parameters for their individual workstations.

Web and multi-user (Tab 4)

Items on this tab (Fig. 4) affect the way SELPA Manager works with IEP forms, how it works in multi-user (4D Client) operations, and how it handles web users.

Fig. 4. Web and multi-user (Tab 4)

1. Form to use for new IEPs (drop-down menu)

This item establishes the IEP form set to be used when creating a new IEP, from within 4D Client. After you select a new form set and then close the preferences dialog, you will see the “Building references...” progress bar appear briefly on the screen.

There are several different form sets available for creating IEPs. The “standard” form sets are combinations of forms released by the state IEP forms committee, plus additional forms requested by SELPAs using the state forms,

- DFLT (2003-2004, 8 pages)
- DFL2 (2005-2006, 15 pages)
- DFL3 (2006-2007, 24 pages)
- DFL4 (2007-2008, 24 pages)
- DFL5 (2008-2009, 39 pages)
- DFL6 (2009-2010, 44 pages)

The DFL6 form set is the most recent (2009-2010 academic year), and is based upon the forms that the state committee released in the summer of 2009.

There are also full-custom form sets for particular SELPAs. These SELPAs can select either one of their own custom form sets, or one of the standard form sets, for use with new IEPs.

Regardless of the setting for new IEPs, the program will continue to open an existing IEP in the form set that was used to create it originally. Even if the student came from another SELPA that had custom IEP forms in SELPA Manager, the transferred IEP would still open in the custom form set.

2. Form to use for new IEPs on web (if different) (*drop-down menu*)

The program can use a different form set for adding IEPs on the web and in 4D Client. If you do not make a selection from this drop-down menu, then SELPA Manager will use the same form set on the web as you specified in “Form to use for new IEPs” (above).

Depending upon which form set you select in this drop-down menu, the program may present additional preference items. The additional items can affect both the form set behavior on the web and within 4D Client. Therefore, you may find it necessary to select (temporarily) the form set from the web drop-down menu, to set these additional preferences.

3. Alt tab order (*DFL2 form set*)

The DFL2 form set has two possible tab orders when presented on the web. Checking this box sets the

DFL2 Standard order

- IEP (1)
- Transition Svcs (1A)
- ITP (1B)
- PLAA (2)
- Special factors (3)
- Goals (4 A-B-C)
- Services (5)
- Signature/consent (6)
- Meeting comments (7)
- Team amendments (8)
- SLD eligibility (9A)
- SLD discrepancy (9B)
- Appendix D

DFL2 Alternate order

- IEP (1)
- PLAA (2)
- Special factors (3)
- Goals (4 A-B-C)
- Services (5)
- SLD eligibility (9A)
- SLD discrepancy (9B)
- Signature/consent (6)

- Meeting comments (7)
- Transition Svcs (1A)
- ITP (1B)
- Team amendments (8)
- Appendix D

4. MediCal signature line (DFL2 form set)

Checking this box adds an extra initials line to the DFL2 IEP signature page:

___ I give my permission for the school district or SELPA to bill Medi-Cal for eligible services provided at no cost to parents.

5. Parent CAC box Forms 6A/6B (DFL6 form set)

Checking this box adds an extra check box and label to the two DFL6 IEP signature pages:

___ Parent has received brochure and application for the Community Advisory Committee (CAC) for Special Education

6. Simplified Section 4 (DFL6 form set)

Checking this box rearranges the student services data entry form on the web, so that Section 4 (for non-infant, non-HMS services) presents only the following two items (also see Fig. 5):

- Duration, minutes per session ([Student_service]Minutes_per_session)
- Frequency as a drop-down menu ([Student_service]Frequency_other)

Fig. 5. Student services data entry, Section 4, DFL4 form set, with Simplified Section 4 option.

When the Simplified Section 4 box is *not* checked, Section 4 consists of these items (also see Fig. 6):

- Duration, drop-down menu of descriptions ([Student_service]Duration)
- Frequency as a drop-down menu ([Student_service]Frequency_other)
- Sessions per week as a number ([Student_service]Sessions_per_week)

LEA district [Select LEA district]

4. For non-infant, non-MHS services:

Duration (other description) [Select duration] (Describe if other:)

Note: This item prints as the duration, provided that the "Duration, minutes per session" (infant section) is zero.

Frequency (other) [Select other frequency] (Describe if other:)

Sessions per week

Note: This item prints as the frequency, provided that no "Frequency code" (infant section) and no "Frequency (other)" values are specified.

*Required items

Save Cancel

Fig. 6. Student services data entry, Section 4, DFL4 form set, without Simplified Section 4 option.

Additionally, if you have specified a date for the System 2 preference,

Require either duration and frequency (other); or duration and sessions per week for non-infant, non-MHS services starting on/after...

and the student service being edited on the web has a start date on/after the specified date, then SELPA Manager will have different completion requirements for the Simplified Section 4 option (assuming a non-infant, non-MHS service):

- **Without Simplified Section 4 selected**, the program requires Duration (other description) and *either* Frequency (other) *or* Sessions per week.
- **With Simplified Section 4 selected**, the program requires *both* Duration (minutes per session) *and* Frequency (drop-down menu).

7. Left footer (printed forms) (DFL6 form set)

This preference allows you to place a label in the left footer of all printed DFL6 forms. The right footer of printed forms already contains the SELPA name, so you probably would not want to repeat that information in the lower-left corner. You might provide form set release information, or a similar item that would apply to all forms in the form set.

Leave this item blank to eliminate the left footer label.

8. Options (button) (DFL3 form set)

Pressing this button when the DFL3 form set is selected for use on the web causes the program to display a dialog (Fig. 7) that enables you to specify particular pages that you wish to remove from the DFL3 form set on the web.

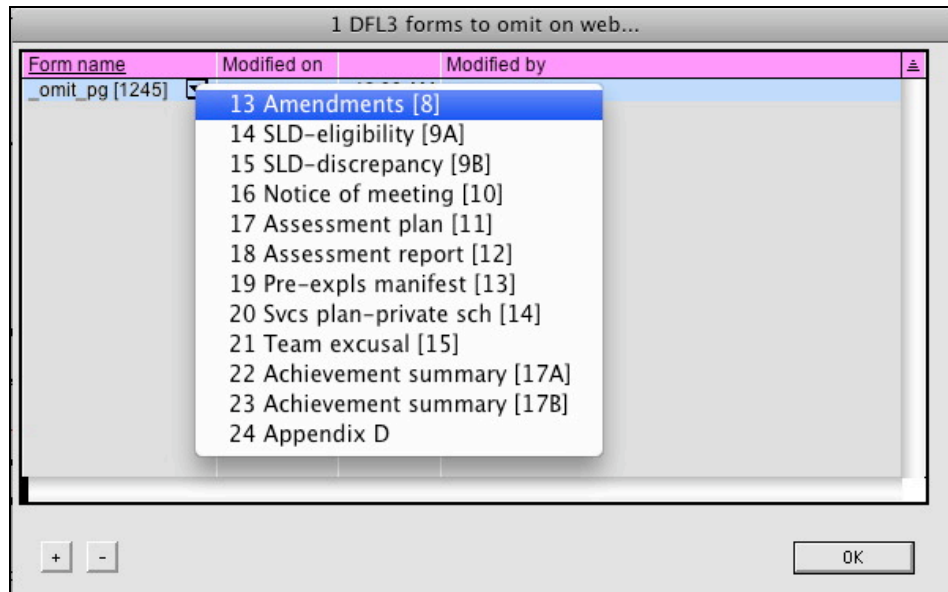


Fig. 7. DFL3 form set omit dialog.

The first column will display the name of the form(s) that are hidden. To add a form to the list, press the add (+) button, and then select the name of the form in the first column drop-down. Not all forms can be hidden.

To remove a form from the list, causing it to be shown again on the web, highlight the row and then press the remove (-) button.

9. Options (button) (DFL4 form set)

Pressing this button when the DFL4 form set is selected for use on the web causes the program to ask, “Set tab colors for web IEP?” If you press the “OK” button, the program will display a small dialog (Fig. 8) with a drop-down menu of colors. The selected color applies to all tabs in the form set. The default color scheme is white on green, when no preference is selected.



Fig. 8. DFL4 form set tab color dialog.

The program will also prompt, “Set forms to omit for web IEP?” If you press the “OK” button, the program will display another dialog (Fig. 9), which allows you to select forms to omit from the web. To add a form to the list, press the add (+) button, and then select the name of the form in the first column drop-down. Not all forms can be hidden.

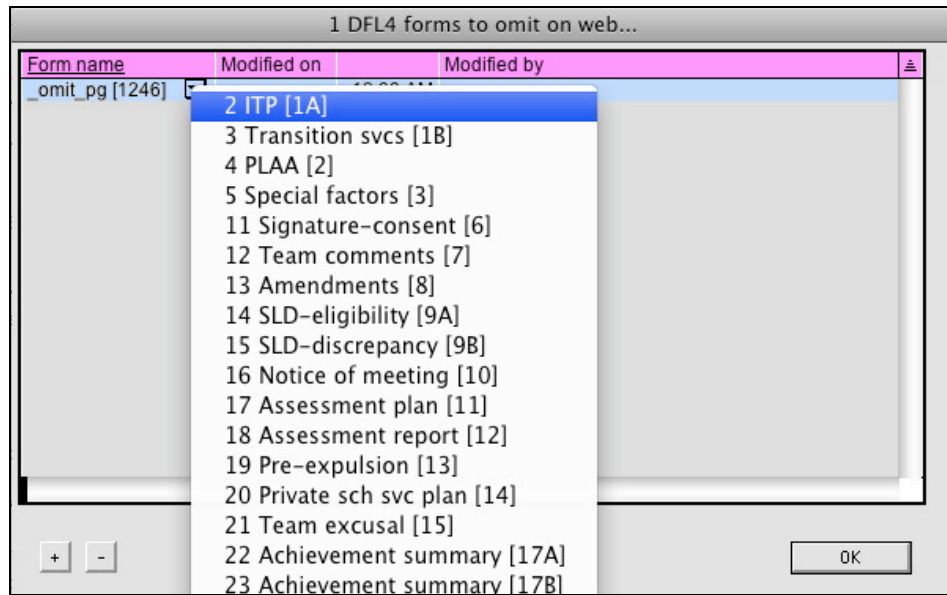


Fig. 9. DFL4 form set omit dialog.

10. Options (button) (DFL5 form set)

Pressing this button when the DFL5 form set is selected for use on the web causes the program to display a configuration dialog (Fig. 10).

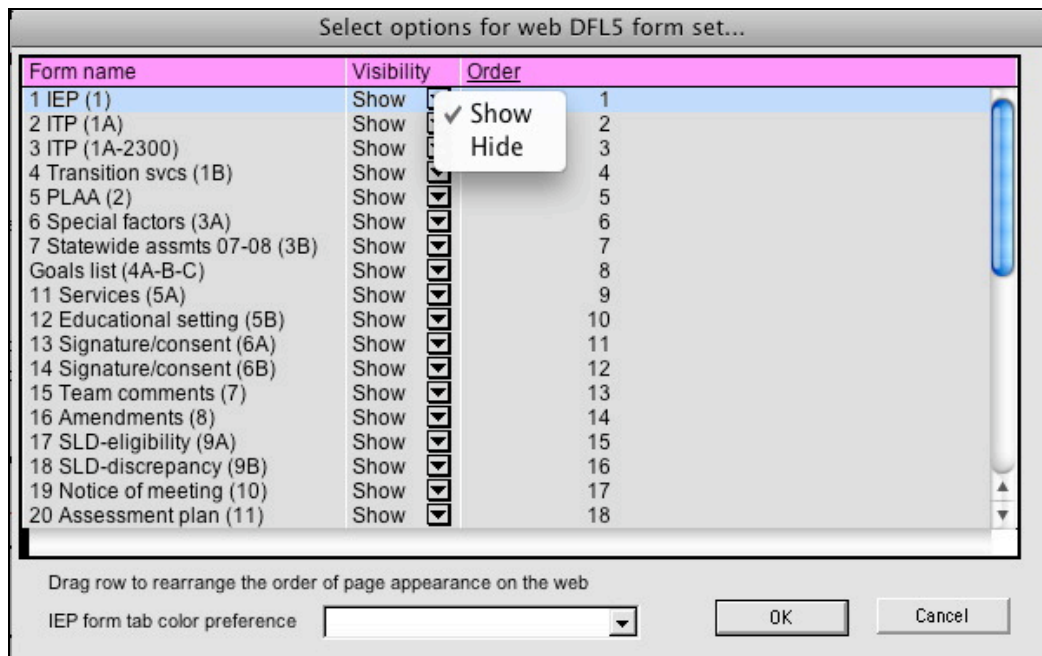


Fig. 10. DFL5 form set options dialog.

To show or hide a form, go to the row representing that form, and click on the drop-down menu in the Visibility column. Select either “Show” or “Hide”. Certain pages cannot be hidden, however: IEP (1); Goals list (4A-B-C); and Services (5A).

To rearrange the order of the tabs, click and hold on a row, and then drag it to the location where you would like it to be. However, you cannot change the position of the first form, IEP (1).

To change the color of all tabs displayed on the web, select a color from the “IEP form tab color preference” drop-down menu, below the list. The default color scheme is black on orchid, when no color preference is selected.

11. Options (button) (DFL6 form set)

This button enables you to further customize the appearance and behavior of the DFL6 form set on the web. Pressing the button causes the program to display a “DFL6 form set options...” dialog (Fig. 11.).

The dialog allows you to selectively show or hide most forms in the DFL6 form set; to rearrange the tabs in a custom order of appearance; to select individual colors for the tabs; and to define individual sets of IEP completion requirements, based upon the student's plan type and the IEP meeting type. At this time, the settings in this dialog do *not* affect the appearance or requirements for the same IEPs, when created or edited in the SELPA Manager browse window (using 4D Client).

DFL6 form set options...

Pages and order of appearance on the web Apply a color to all tabs: White on gray

Form name	Visibility	Order	Tab color
10 Services/FAPE (5A)	Show	8	White on gray
11 Educational setting (5B)	Show	9	White on gray
12 Signature/consent (6A)	Show	10	White on gray
13 Signature/consent (6B)	Show	11	White on gray
14 Team mtg notes (7)	Show	12	White on gray
15 Amendments/addendum (8)	Show	13	White on gray
16 SLD-eligibility (9A)	Show	14	White on gray
17 SLD-discrepancy (9B)	Show	15	White on gray
18 Referral (21A)	Show	16	White on gray
19 Referral receipt (21B)	Show	17	White on gray
20 Assessment plan (22A)	Show	18	White on gray
21 Prior written notice initial (22B)	Show	19	White on gray
22 Notice of meeting (23)	Hide	20	White on gray
23 Notice of meeting (24)	Hide	21	White on gray

Required items on the web IEP Restore default settings

Field or other item	IEP/IFSP (10)	ISP (20)	None (70-80-90)	No plan	IEP type(s)	DFL6 p
A-04 DIST_SERV	Yes	Yes	Yes	No		1, 11
A-05 DIST_RESI	Yes	Yes	Yes	No		1
A-06 SCH_CODE	Yes	Yes	Yes	No		1, 11
A-07 SCH_TYPE	Yes	Yes	Yes	No		11
A-11 SSID	No	No	No	No		1
A-12 SSN	No	No	No	No		1
A-13 DOB	Yes	Yes	Yes	No		1
A-14 GENDER	Yes	Yes	Yes	No		1
A-15 ETHNICITY1	Yes	Yes	Yes	No		1
A-16 ETHNICITY2	Yes	Yes	Yes	No		1
A-17 ETHNICITY3	Yes	Yes	Yes	No		1
A-18 ETHNICITY4	Yes	Yes	Yes	No		1

PAGES AND ORDER OF APPEARANCE ON THE WEB (upper list)

This list has one row for each form in the DFL6 form set that can be displayed on the web. The first column ("Form name") lists the form by name. The second column ("Visibility") allows you to hide one or more forms.

Print OK Cancel

Fig. 11. DFL6 form set options dialog.

The “DFL6 form set options...” dialog has an upper and a lower section.

Upper section. The upper section allows you to selectively show or hide particular forms, to rearrange the tab order, and to specify colors for the tabs.

To show or hide a form, go to the row representing that form, and click on the drop-down menu in the Visibility column. Select either “Show” or “Hide”. Certain pages cannot be hidden, however: IEP (1); Goals list (4A-B-C); and Services/FAPE (5A).

To change the color of a particular tab, click on the drop-down menu in the Tab color column. You can also use the drop-down menu above the upper list to set a color for all tabs (“Apply a color to all tabs”). If no color is listed for a row or for all rows, then the program uses a default color (white on gray slate).

To rearrange the order of the tabs, click and hold on a row, and then drag it to the location where you would like it to be. However, you cannot change the position of the first form, IEP (1).

Lower section. This list allows you to indicate which items should be required for users completing IEPs on the web, as a function of the student's plan type and the meeting type. The IEP must be checked "Incomplete" at the top right on the form, until these items are entered on the forms.

There are four categories of plan type, each represented by a column in the list,

- IEP/IFSP (10)
- ISP (20)
- None (70-80-90)
- No plan

When you open this dialog for the first time, the default requirement settings for the first three columns (Plan types 10, 20, and 70-80-90) are intended to represent the requirements for Table A of the CASEMIS report.¹⁵

The items that you specify as required in this list appear as green text at the top of each IEP form, until the user completes them in the IEP. Items on forms that you have hidden (in the upper list) will *not* appear as required items on the IEP, even if you have specified them as required here.

To specify an item as required, double-click into the cell(s) in the row representing the item, and check the appropriate box, based on plan type. For example, to specify "Case manager" as a required item for Plan types 10 and 20, double-click into the second and third columns for the Case manager row, and check the two boxes.

To require that the user always enter a plan type on the IEP, change "A-32 PLAN_TYPE" to "Yes" for the "No plan" column in the table. If the plan type is required

¹⁵ *California Special Education Management System (CASEMIS) Technical Assistance Guide*. California Department of Education, Special Education Division: June 2009 Draft. See Table A: CASEMIS Student Data., pp. 6-7.

in the "No plan" column, then the other items in the "No plan" column are no longer evaluated.

If you enter one or more meeting types in the "IEP type(s)" column, then the item in that row will be restricted to only this/these meeting types. Otherwise, the item will apply to all meeting types. To specify meeting types, double-click into the cell that you wish to edit. Each listed meeting type should be separated by a comma or semicolon. Do not enter "Other" or "Other:" in any of the listed IEP types.

Some items are further restricted (beyond plan type and meeting type). For example, the algebra test ("Algebra test particip"), if required, applies only to grades 7-10. Age restrictions apply to other fields, such as transition items. The additional restrictions are listed in the last column in the table ("Notes").

IMPORTANT: If you make changes here to the requirements, the existing IEPs are *not* automatically re-evaluated based on the new criteria. However, if a web user accesses an existing IEP that is not locked and not in "reviewed" status, then the percentage complete saved with the IEP will change as the web user moves among the IEP pages, or presses the Save button. The requirements will be different than they were previously for the same record.

Earliest validation date. You can designate an "Earliest validation date" for these requirements. If the validation date is specified (not blank), then the program won't apply the requirements to IEPs that are older (created before this date).

Restore default settings (button). To return the requirements to their original (default) values, press this button.

Print (button). To print the instructions for the dialog, as well as a summary of your setting selections for both the upper and the lower list, press this button.

OK (button). When you have finished and wish to save your settings, press the OK button. You must *also* save the administrative preferences dialog after this dialog closes, however; otherwise, your changes won't be saved.

12. Initial lists, web: Students

This drop-down list specifies the default selection of students that appears initially, on the home page on the web. Each of these options is restricted by the selection of students that is accessible to the login user. Additionally, the login user can override these settings while on the web, by selecting "Preferences" from the navigation bar on the home page.

The options are,

- All for me (*all students, subject to the login user's access restrictions*)
- Case manager (*students for whom login user is the case manager*)
- Case manager current (*current students today, for whom login user is case manager*)
- Case manager current primary (*current students today, based on primary service only, for whom login user is case manager*)
- Current
- Current primary

- Dropped my services
- Dropped all services
- None
- Overdue-last IEP
- Overdue-last eval
- Overdue-either
- Due next IEP 30 days
- Due next eval 30 days
- Due either in 30 days
- Due either in 75 days

13. Flags (button)

Clicking this button causes the program to display a dialog for defining “warning” colors for rows in the student (upper) list, on the home page of the web interface (Fig. 12).

Configure web student list warnings...

Select the warning flags that you want to appear for the student list on the web. The evaluation applies in numeric order (1, 2, 3, 4, then 5), so your most significant warning should always appear first; otherwise, a less-significant warning could appear instead.

Active rows must have the Text color, Type, and When columns specified, or the dialog cannot be saved. If the Days are zero, the program will assume assume 10 days for the "Due in (days):" case.

	Status	Text color	Type	When	Days*
1.	Active	Red	Either	Overdue	0
2.	Active	Blue	Either	Due in (days):	75
3.	Inactive	Red	IEP	Overdue	0
4.	Inactive	Red	IEP	Overdue	0
5.	Inactive	Red	IEP	Overdue	0

* The days column is not used for the overdue cases

OK Cancel

Fig. 12. Configure web student list warnings dialog.

You can establish up to five warnings in this dialog, by marking the first column as “Active” in each of the rows that you want to use. The second column (“Text Color”) determines the color of the student row that qualifies for the warning. The third column (“Type”) allows you to select whether the trigger for the warning will be based on the IEP, the triennial evaluation, or either the IEP or the evaluation.

The fourth column (“When”) specifies whether the warning should be based upon the item (IEP, triennial, or both) being overdue, or due within a specified number of days. For the latter, you must specify the number of days in the fifth column (“Days”).

As an example, the first row of the dialog indicates that if either the IEP or the triennial evaluation are overdue, then the student row should be drawn in red text on the web.

If the IEP or the triennial are due within 75 days, then the student row should be drawn in blue. The third-, fourth-, and fifth-row warnings are not in use (they are marked as “Inactive” in the Status column).

In deciding which warning to display, the program evaluates the list from top to bottom. Thus, if a particular student qualifies for more than one warning, then the program will draw the student in the color corresponding to the first qualifying warning event.

14. Initial lists, web: IEPs

This drop-down list specifies the default selection of IEPs that appears initially, on the home page on the web. Each of these options is restricted by the selection of IEPs and/or students that is accessible to the login user. Additionally, the login user can override these settings while on the web, by selecting “Preferences” from the navigation bar on the home page.

The options are,

- Created by me-all (*IEPs created by the login user*)
- Created by me-incomplete
- Created by me-last 30 days
- Created by me-last 180 days
- Created by me-locked
- Created by me-reviewed
- My students-all (*all IEPs for students to which the login user has access*)
- My students-last 30 days
- My students-last 180 days
- None

15. Add student with IEP on web

Checking this box allows login users on the web to create an IEP for a “new” student (one that is not already listed in SELPA Manager). In this case, there will be a button on the web page, “Create IEP for NEW student”.

16. Attachments on web

Checking this box allows login users on the web to “attach” pdf and Word documents to an IEP. An “Attach” link will appear on the top right of the first web page.

Clicking on the “Attach” link causes the program to display a smaller, pop-up window, listing the existing attachments for the IEP (if any). The user presses the “Browse” button to find a file on disk that s/he wishes to attach; the user then presses the “Upload “ button to move the document to the server.

When there are existing attachments for a particular IEP, the “Attach” link will be orange; otherwise, the link is blue. The color won't refresh immediately after uploading a document; the user must refresh (re-submit) the page by clicking on a navigation tab on the main window. With SELPA Manager v.4.76 versions, it may be necessary to press the “Refresh” button on the pop-up window after uploading a new item, before you will be able to see the item listed.

The IEP form sets that allow attachments include: DFLT, DFL2, DFL3, DFL4, DFL5, DFL6, 3013, 3702, 3703, 5700, 75B4, 909E and 909F.

17. Assistive devices default

Checking this box causes the program to check a box on a new IEP, indicating that the student will require the use of assistive devices. This check box is typically on the Special Factors form of the IEP. This option is applicable to the following IEP form sets: DFLT, DFL2, DFL3, DFL4, DFL5, DFL6,

18. Case manager print

Checking this box causes the program to place the student's case manager name on printed IEP forms. The setting applies to the following form sets: DFL2, DFL3, DFL4, DFL5, DFL6, 5700, and the first page of the 909F form set, as revised for 2009-2010.

19. Caseload provider hide

Checking this box causes the "Caseload Provider" section to be omitted from the printed services form, for selected IEP form sets. The caseload provider is typically the teacher code and/or teacher name. The setting applies to the following form sets: DFL3, DFL4, DFL5, DFL6, 3702, 5700, 909E, and 909F.

20. Drops on web

Checking this box allows users to drop student services on the web. The student services data entry page will have an additional section at the bottom of the form for drop information (Fig. 13).

5. For discontinued services:
The following items should be specified when the service has been discontinued:

Drop date

Drop reason (primary service only)

Drop code or reason (non-primary service only)

*Required items

Save Cancel

Fig. 13. Optional drop section, student services data entry form (DFL6).

21. Duplicate IEPs on web

Selecting this option places a "Duplicate IEP" button at the bottom of the home page on the web. Web users can select an existing IEP (by pressing the radio button in the row) and then click on "Duplicate IEP" to make a copy.

The new (duplicate) IEP will then open to the first page. The meeting date will be the current date, and the IEP will not be posted, reviewed, or locked. Services, goals, and ancillary items will be cloned from the original IEP.

In general, the program will make the duplicate in the same IEP form set as the original IEP. However, there are certain conversions available:

- DFL3 original to DFL5 duplicate
- DFL4 original to DFL5 duplicate
- DFL5 original to DFL6 duplicate

22. Confirm before duplicating

Checking this box will cause SELPA Manager to present a confirmation box to the user, asking whether it should duplicate the IEP in the original form set or convert to a newer form set. The confirmation dialog only appears when the original form set is one that can be converted to a newer form set (DFL3, DFL4, or DFL5).

If the original form set cannot be converted to a newer form set, *and* the original form is not the one that is currently selected for new IEPs on the web (“Form to use for new IEPs on web (if different)”, p. 29), then the program will warn the user about the situation, asking whether it should proceed. This additional warning will appear whether or not the “Confirm before duplicating” option is selected.

23. Edit student (MIS) IEP notice on web

Checking this box places an additional button on the home page, “Edit IEP notice for this student”, directly below the student list. If the user selects a student from the list and clicks on the button, the program displays an “IEP parental notification” (Fig. 14) for data entry.

IEP parental notification

Record no. 3710371 Copy program defaults Copy user defaults Print

Last Name	First Name	Nickname
<p>IEP notice date <input type="text"/></p> <p>IEP time <input type="text"/> Purpose <input type="text" value="[Select purpose]"/> (Specify if other: <input type="text"/>)</p> <p>Location <input type="text"/></p> <p>Street <input type="text"/></p> <p>Student contact <input type="text" value="[Select contact type]"/> (Specify if other: <input type="text"/>)</p>		

The following personnel may also be present at this meeting:

Regular teacher	Sp. ed. teacher	Suzanna Afghani
Psychologist	Translator	

Fig. 14. Parental notification form (Student record).

This form places information directly into the Student (MIS) record, and bears only a remote resemblance to the Notice of Meeting forms in the IEP form sets (Forms 23 and 24 in the DFL6 form set); there are no shared entry areas. Accordingly, you may wish to leave this option un-checked.

In general, users with limited access (“TeacherLtdGrp” and “CounselorLtdGrp” access groups) cannot edit Student-record information. However, this form is an exception; users with limited access can edit and print this form.

24. Fewer schools in drop-downs

This setting affects the number of schools displayed in drop-down menus for the school of attendance, school of residence, and the school associated with disciplinary actions (Student record).

Normally the program displays all schools for which there are records in the [School] table. However, these records may well number in the thousands, and the drop-down choices may be truncated in the user's web browser program. For example, the listed schools might end after those starting with the letter "M", so a user won't find a school name starting with "N" or "P".

Checking this box will reduce the number of schools to those that are accessible to the user. In the case of a teacher or other service provider ("TeacherLtdGrp" access group), the school list would consist of,

- schools where s/he provides current services
- schools in districts where s/he has teaching assignments
- schools associated with services for students for whom s/he is case manager
- schools similarly associated with *another* teacher/service provider, whose case load has been assigned to the teacher

25. Home page, max recs to list

This setting specifies the default number of Student and IEP records to list on the home page. If the number of students or IEPs found exceeds this number, then the program will display "pages" of students, with arrow keys to navigate among the pages (Fig. 15).

1. Student list
Find an existing student. To create an IEP, press the student's Select button, then click on the 'Create IEP for this student' button. If you cannot find the student, press the 'Create IEP for new student' button. This action will open a completely blank IEP form.

Show students:
**reports using listed students*

Select	Record no.	Student	Last IEP	Next IEP	Last eval.	Next eval.
5 listed, page 1 of 10 (total of 48) <input type="button" value=""/> > <						
<input type="radio"/> view	3773569-10983-0501		12/17/2007	12/17/2008	11/16/2006	11/16/2009
<input type="radio"/> view	3710371-00272-0501		04/28/2008	04/28/2009	05/18/2006	05/18/2009
<input type="radio"/> view	3710371-00207-0501		07/15/2008	06/11/2009	06/12/2006	06/12/2009
<input type="radio"/> view	3710371-00247-0501		12/03/2008	12/03/2009	01/25/2006	12/24/2009
<input type="radio"/> view	3710371-00273-0501		10/02/2008	10/02/2009	10/02/2007	10/02/2010

Color key (evaluated left to right): [Overdue - Either] [Due in 75 days - Either]

Fig. 15. Home page student list, showing list pagination (5 records per page)

Users can set their own preference for the maximum number of students and IEPs to display on the home page. They access this setting by selecting "Preferences" from the navigation bar at the top of the home page. The user setting, when present, overrides the default setting.

26. 'Ind/Grp/ST' hide

When checked, this item prevents the “Ind/Grp” or “Ind/Grp/ST” box from appearing on the printed service form, for selected IEP form sets (DFL3/DFL4/DFL5/DFL6). The box represents the field, [Student_service]Svc_delivery_model, for the service delivery model (Group, Individual, or Sec transition).

27. Mark new IEPs incomplete

When selected, this item checks the “Incomplete” box on all new IEPs.¹⁶ Having the Incomplete box checked reduces the number of items that must be completed before moving from page to page on the IEP, or saving and closing the IEP.

28. My current stats on web

When checked, this item places an extra, pink section at the top of the home page (Fig. 16), which provides information on the user's access level to SELPA Manager, the number of accessible students and IEPs, and the number of students who are due or overdue for IEPs.

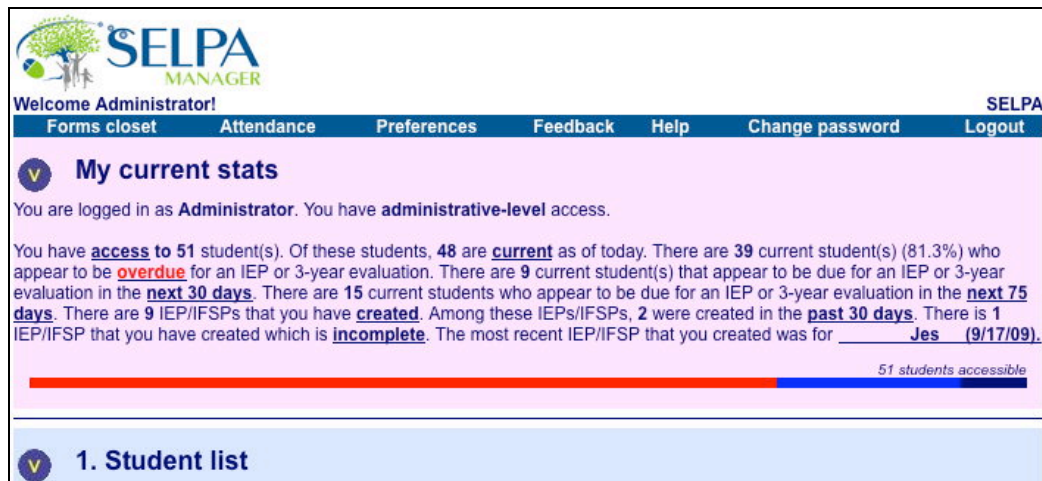


Fig. 16. My current stats section, home page on web.

The colored bar near the bottom of the pink section indicates the number of current students that may be overdue (red); the number of current students that appear to be up-to-date on assessments (medium blue); and the remaining number of students that are accessible, whether current or not (dark blue).

29. No “New goal for...”

When adding a goal to an IEP on the web, SELPA Manager normally inserts default goal text having the pattern,

New goal for Sampson, Jason [4.18.2005 8:45 am].

Checking this box causes the new goal to appear without any default contents.

¹⁶ On 4D Client IEP forms, the box appears as “Inc”, on the top and bottom of each form page.

30. No sig line names

On IEP signature pages, SELPA Manager normally places the names of the parents, teachers, and other participants on the signature lines in small, italicized text. Checking this box prevents the program from printing the names on the signature lines.

31. Special ed eligible default

Checking this box causes the program to designate a new student as eligible for Special Education, when creating a new IEP. This provision applies to IEP form sets that use the field, [Assessment]Cert_requires_special_ed_B (2300, 3013, 3702, 3703, 75B4, 4900, 5700, 909E, 909F, DFLT, DFL2, DFL3, DFL4, DFL5, DFL6).

This preference does *not* set the student's plan type on the IEP. However, if the user unchecks the "requires special education" box on the IEP (representing the [Assessment]Cert_requires_special_ed_B field), then, when updating the Student (MIS) record, the program will check the "DNQ" (Does Not Qualify) box for the Student.

32. Service consult hide

When checked, this item prevents the "Consult" box from appearing on the printed service form, for selected IEP form sets (3702, 5700, DFL3, DFL4, DFL5, and DFL6). The box represents the Boolean field, [Student_service]Consult_B.

33. Special prt ESY services

Checking this box causes extended-year student services to be printed twice on the services page of selected IEP form sets (5700, DFL2, DFL3, DFL4, DFL5, and DFL6).

Normally the service page has separate sections for current-year services and extended-year services. In many cases, however, the extended-year service is the same record as the current-year service. When this option is selected, the second printing of the service in the extended year omits many of the details (start date, end date, caseload provider, service consult, service delivery model, frequency, duration, and location).

34. SSN hide on IEP form

Checking this box causes the program to omit the student's Social Security Number on printed forms, in selected IEP form sets (909F, DFL3, DFL4, DFL5, and DFL6). This preference also omits the Social Security Number on web entry forms for selected IEP form sets (DFL3, DFL4, DFL5, and DFL6).

35. Student-required fields

When checked, this box imposes additional requirements for completion of IEPs, on the demographics page(s) of selected web IEP form sets (3013, 3702, 3703, 5700, 75B4, 909E, 909F, DFLT, DFL2, DFL3, DFL4, and DFL5).

This preference setting does *not* apply to the DFL6 form set, which uses a newer system for determining the level of completeness for IEPs.

The additional requirements vary slightly among the form sets (Fig. 17).

	After 7.1.06 only	Qualif. Stdnts only	3013	3702	3703	5700	75B4	909E	909F	DFLT	DFL2	DFL3	DFL4	DFL5
Consent date	x		Y	Y	Y	Y	Y	Y	Y	No	No	Y	Y	Y
Date of birth			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
District of residence			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Ethnicity			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Gender			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Grade			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Home (native) lang.			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Initial eval. date	x		Y	Y	Y	Y	Y	Y	Y	No	No	Y	Y	Y
Last eval. (tri) date			No	Y	Y	Y	No	Y	Y	Y	Y	Y	Y	Y
Last IEP date		x	No	No	No	No	No	No	No	Y	No	No	No	No
Primary disability		x	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Referral by	x		Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Referral date	x		Y	Y	Y	Y	Y	Y	Y	No	No	Y	Y	Y
Residency			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
School of att.			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
School of att. type			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Secondary disability	x	x	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Special ed start date		x	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
STAR participation			p. 3	No	No	No	p. 3	No	No	No	p. 5	p. 5	p. 5	p. 7

Fig. 17. Items required for IEP form sets when "Student-required fields" is checked.

36. Svcs at school of res default

Checking this box causes the program to select a "Yes" value for the form item, "[All] Special Education services provided at the student's school of residence?" when creating an IEP. This preference applies to these IEP form sets: 3702, 3703, 5700, 909E, 909F, DFLT, DFL2, DFL3, DFL4, DFL5, and DFL6.

37. Allow drops on IEPs on/after (date)

This setting determines whether dropped student services will appear on IEP forms that contain student services. If the preference date is blank ("00/00/00"), then only services with a blank drop date are included. If the preference date is *not* blank, then services dropped on or after the preference date will be included on the IEP.

If the user drops a student service while editing the IEP, and this preference is set to prevent drops from appearing on the IEP, then this service will "disappear" when the user has finished editing it. The service itself is still associated with the IEP, but isn't visible because of this setting.

38. Web holds: Release after (number) min

This setting determines the length of time given to an idle web user who is editing an IEP, before other users can edit the same IEP.¹⁷ Having a web hold reduces the chance that more than one web user might be working on the same IEP simultaneously, possibly overwriting each other's work.

The time begins from when the user first opens the IEP, or from when s/he last used the navigation tabs to move from page to page. If the hold time passes without the user posting new information, then the server releases the web hold. The next web user to open the same IEP, or to move among the IEP pages, will acquire the hold, and the time clock begins again.

¹⁷ Web holds also apply in a similar fashion to editing student records.

During a hold, other users can access the same IEP. However, a notification appears at the top of each page, indicating that the other user(s) cannot save any changes.

To be eligible for a web hold, a user must have read-write access to the IEP; s/he cannot be a read-only user. The IEP must not be in reviewed or locked status.

Program users who access an IEP through 4D Client can access and edit it at any time, regardless of whether or not there is a web hold in progress. However, if the 4D Client user has the IEP open when the web user attempts to move among the IEP pages, or save the IEP, then the web user will receive an error message, indicating that the IEP record cannot be updated.

To reduce the possibility that a 4D Client user will open an IEP that is being edited on the web, the row representing the IEP in the 4D Client browse window has a magenta color. Additionally, if the 4D Client user does open the IEP, a warning appears in the problem/missing items box indicating that a web user is in the IEP.

The following provisions apply to the web holds,

- A setting of 10 minutes or more yields a web hold of the same time
- A setting of less than 10 minutes (but not zero) yields a web hold of 10 minutes
- A setting of 0 results in no web hold interval, disabling web holds

An appropriate web hold time would be sufficiently long to permit a web user to finish editing a page, so s/he can update the IEP without another user having assumed the hold.

Another approach is to instruct web users that they should periodically save their work by clicking on a navigation tab (e.g., the tab for the page that they are currently editing). If the web hold release is set at 20 minutes, then the instruction to users could be to save their work every 10-15 minutes.

39. Web holds: Release all (*button*)

Clicking on this button releases any current web holds for the entire system. This action may adversely affect current web users, since a user might be working on a page when the hold is released; another user could then assume the hold before the first user has an opportunity to post their edits.

A 4D Client user with read-write access to a particular IEP can release a hold in progress, by clicking on the “Release hold” button at the top of the form, and then saving the IEP. The “Release hold” button appears only if there is a web hold in progress on the IEP. If the 4D Client user clicks on the “Cancel” button (instead of “Save”) on the IEP, then the hold will not be released.

40. Disable holds

Checking this box has the same effect as setting the web hold time to zero minutes; it disables web holds.

41. Web student access (TeacherGrp, ReadWriteGrp, AdminGroup can edit)

Checking this box causes either a “View student” or an “Edit student” button to appear beneath the student list on the home page, depending upon whether or not the web user has read-write access to the student record. Web users with teacher limited (“TeacherLtdGrp”) or higher access will have sufficient privileges to edit the student record.

42. Notices: Logon (button)

Clicking on this button causes the program to display a dialog, in which you can compose a message to all users. The message will appear for both web and 4D Client users at the time they next log on to SELPA Manager. The message appears once for each login user; the next user to log in with the same name won't receive the same message again.

When you finish composing the message, press the “OK” button to close the dialog. The program will ask, “Set flags for users to see this message?” If you click the “OK” button, then the program sets a flag for each login user, which is cleared when they next connect to SELPA Manager.

If you click the “Cancel” button, then the message won't be sent.

If you clear an existing message from the dialog, and then press “OK”, the program will ask you whether it should clear all flags that might still be set for user notification. This provision allows you to “take down” a logon notice that is no longer relevant.

After editing the logon message, ensure that you also save the preferences dialog, or the logon message will not display.

43. Notices: Web page (button)

Clicking on this button causes the program to display a dialog, in which you can compose a message that will appear at the top of the home page. The message will appear every time that a web user returns to the home page.

After editing the web page message, ensure that you also save the preferences dialog, or the message won't appear on the home page.

44. Notices: Instant (button)

Clicking on this button causes the program to display a dialog, in which you can compose an “instant” message that will appear as a dialog on the screen of 4D Client users. This message will appear once, unless you subsequently change the content of the message. The instant message does not affect web users.

After editing the instant message, ensure that you also save the preferences dialog, or the message won't appear.

45. Auto-refresh browse window after (number) seconds

The SELPA Manager browse window (4D Client) consists of an upper and a lower list, which display the contents of two separate tables in the program. For example, the

Students context of the browse window by default displays Student records in the upper list, and IEP (Assessment) records in the lower list.

Because other users may be active at the same time, some of the information in the lists may change over the course of a few minutes. The lists will refresh each time that you perform a search, sort, or change of browse window context, or when you finish editing a record.

In addition, the program refreshes the display automatically every minute. This provision helps ensure that the information that the 4D Client sees is current. However, the auto-refresh can cause problems on some workstations, if more than one browse window is open at the same time.¹⁸

If you experience errors with multiple browse windows open, you can set the auto-refresh interval to zero, so that it never refreshes automatically (allowed auto-refresh values are 1 to 998 seconds). The auto-refresh interval is a per-user setting; each user who wishes to use a value other than 60 seconds must change it for their own login user name.

46. Prevent user logins after (*time of day*) for a duration of (*minutes*)

These two settings enable you to specify a time interval in which users cannot connect to SELPA Manager. This provision is useful in conjunction with the 4D Backup plug-in, so that the server can write a full backup copy of the data to disk without interruption.

If a 4D Client user has left for the day, but has left a Student, IEP, or other record open on the screen, then the backup may not be able to complete. Instead, the backup will pause when it arrives at the open record, waiting for the user to release it. When other users attempt to connect again, they will receive a message that the backup is in progress, and that they must wait for it to complete.

To avoid this situation, you can set the time of day to 10-15 minutes prior to the scheduled time of the backup, and the set the duration to 20-30 minutes. If any 4D Client user workstations are connected at the specified time, then the program will send a 5-minute warning. After the warning time has expired, it will disconnect the workstation(s) automatically.

For the 4D Client exclusion to function, the duration interval must be greater than zero minutes. The exclusion does not apply to 4D Client workstations that are performing web printing; they will not be logged off. If you as an administrator ("AdminGroup" access group) wish to connect with 4D Client during the exclusion time, hold down the [Shift] key after you enter your password, as you press the "OK" button. The program will ask,

Log on even though within proscribed time? (CANCEL= quit now)

If a web user attempts to connect during the exclusion time, they will receive the message,

Server cannot accept new connections now (excluded time, try again later)

¹⁸ SELPA Manager allows up to 6 browse windows to be open simultaneously, in 4D Client.

Web users whose idle interval has not timed out¹⁹ when the excluded time begins will be unable to post their work back to the server.

47. Time out idle web connections after *(number)* minutes

A non-zero number of minutes entered in this box will start a timer after each posting action by a web user, such as searching for a student or IEP, or navigating among the pages of a student or IEP record.

If the web user is inactive for a time interval that exceeds the time-out minute setting, then the server will automatically log them off of the system. The next time that the user attempts to post, the server will display the login page again, with an error message,

Incorrect login or your session timed out. Please login again.

48. Access restrictions *(button)*

Clicking on this button causes the program to display information about your level of access to the program. For example, even as an administrator, you may limit your login account to specific schools, districts, or grade levels. A similar button appears on the other preference dialogs (for lower-level-access users).

Clicking on this button does not actually change any system preferences.

49. Print to pdf time out *(seconds)*

This setting allows you to specify a maximum number of seconds to allow on the server, for a web printing task to be completed by a 4D Client workstation that is acting as a print server. If the print job does not return to the server in the allowed number of seconds, then the server returns an error message to the web user, indicating that the print request timed out.

The minimum value for the time-out value is 60 seconds. If web users are experiencing many of the time-out errors, then you might be able to reduce the number of errors by increasing the number of seconds.

50. pdf995 additional wait time *(seconds)*

This setting applies an additional number of seconds to the print-to-pdf time out, to compensate for additional delays associated with the pdf995 print driver. If you are using pdf995 on Windows as one of your print servers, then this value should be at least 1-2 seconds. Depending on circumstances, it may need to be higher – in the 2-8 second range. Unlike the print to pdf time out value, each second of wait time added here will result in an additional second of delay for the web user.

51. Semaphore wait time *(seconds)*

This setting indicates a number of seconds that the program will wait to obtain exclusive access to a series of values that are needed to maintain session information for currently logged-on web users. If the setting value is zero, then the program defaults to 30 seconds

¹⁹ The preference, “Time out idle web connections after *(number)* minutes”, which is discussed next.

of wait time. Unless instructed to do otherwise by technical support, you should leave this item set to zero (for the default of 30 seconds).

52. SSL web connections only

SELPA Manager has the capability to use Secure Socket Layer (SSL) communication with web users, when an SSL certificate is installed.²⁰ Under these circumstances, the server can accept both SSL and non-SSL users.

If this box is checked, then non-SSL users will receive an error message at attempted login,

```
The program cannot accept non-secure logins. Please try
connecting again, using 'https:' rather than 'http:' in the
URL.
```

53. Disable web print workstation after (failures)

This setting allows you to disable a troublesome web print server if it exceeds a certain number of errors (print failures). The setting only applies in a situation where there are two or more print servers, so there is one to fall back on. If SELPA Manager disables the print server, it will post a tracking message indicating the action and time of day.

The setting must be greater than zero to be in effect.

54. Web cache info (button)

The purpose of this button is to display a dialog containing web server statistics, such as the number of “hits” on particular pages, and the percentage of hits served from the web server cache. Unfortunately, the button has never performed as expected.

55. Clear html folder (button)

This button causes the html folder on the server to be cleared of any files with the prefix “WX_”, the suffix “.pdf”, and/or the suffix “.txt”. These files may have been generated in the past, in the course of user activities such as printing reports over the web. The current web print serving mechanism in SELPA Manager no longer depends upon placing files in the server html folder.²¹

Normally, the program deletes these files after the user downloads them, and then clicks on a return link, to resume work where s/he was prior to the print job taking place. If the user does not click on the return link, however, then the download file remains in a folder on the server.

²⁰ Refer to Item 13 (SSL button) on Tab 1 of preferences, above.

²¹ However, temporary pdf files still are placed into the html folder of a 4D Client workstation that is acting as a web print server.

IEP notice defaults (Tab 5)

Items on this tab are used to copy default information into student and IEP records, for IEP notification and signature/parental consent forms. The default information includes the names of the participants at the meeting; the location of the meeting, and contact information (Fig. 18).

The screenshot shows the 'Set system preferences (admin. user)...' dialog box with the 'IEP notice defaults' tab selected. The dialog is divided into several sections:

- Location Section:** Includes fields for 'Location' (Horton Pavillion), 'Room' (204-L), and 'Street' (74 Wilhelmina Avenue, Port Hueneme, GA). A 'My defaults' checkbox is checked.
- Participants Section:** A grid of fields for various roles:

Regular teacher	Olivia O'Hare	Sp. Ed. teacher	Francis McDermott
Psychologist	Nestor Muñoz	Translator	Oscar Nichtmuller
Nurse	Pat Pautler	Other 1	Austin Ho
Principal	Roger Salazar	Other 2	Wes Kiplinger
Speech/language	Marty M. Nemko	Other 3	Nadine O'Dell
		Other 4	Kim Wachtel
- Contact Section:** Includes fields for 'Contact' (Irene Bottomley), 'Title' (Administrative Assistant), 'Address 1' (6824 Walnut Ave.), 'Address 2' (Unit 2448), 'City, St, Zip' (Los Gatos, CA 95338), 'Telephone' ((408) 223-1928), and 'Return form to' (Irene).
- Footer:** Shows 'v 4.75311 (serialized, 8 user(s))' and 'OK'/'Cancel' buttons.

Fig. 18. IEP notice defaults (Tab 5).

As an administrative user, you may enter the IEP notice defaults that would apply to all program users. You can also enter another, personal set of notice default items that apply to you only, by checking the “My defaults” box. Checking and un-checking the “My defaults” box toggles between the two sets of items.

Users without administrative privileges may view, but cannot change, the global notice defaults. Checking the “My defaults” box enables them to enter their own, personal set IEP notice information. Web users can also edit their personal IEP notification defaults, by clicking on Preferences in the navigation bar, on the home page (Fig. 19). The IEP notification defaults start with the “IEP location” and continue down the page.

When a user is editing a student record in 4D Client, on the “IEP Notice” tab, s/he can press the “Copy program defaults” button to incorporate contact and address information into the student record. Similar buttons also exist when editing IEPs in 4D Client, on the signature and parent consent pages.

Preferences for Administrator

Save Cancel

Max. records to list 0 (range: 0-300; zero defaults to system setting)

Initial display, student list None (no selection defaults to system setting)

Initial sort, student list [Select sort] (no selection defaults to last/first name sort)

Initial sort, IEP list [Select sort] (no selection defaults to meeting date sort)

☐ Skip color warnings for IEP and evaluation dates (on student list)

Primary contact type to copy for a new IEP [Select sort] (specify if other:) (no selection defaults to 'resides here' address)

Secondary contact type to copy for a new IEP [Select sort] (specify if other:) (no selection defaults to mailing address)

IEP location Horton Pavillion

Room 204-L

Street 74 Wilhelmina Avenue, Port Hueneme, GA

Regular teacher Olivia O'Hare

Fig. 19. Preferences dialog on the web, showing IEP notice defaults.

If the user has left the “My defaults” button checked in their own preferences dialog, then the program will copy their personal set of IEP notice defaults into the record; otherwise, it will copy the global notice defaults.

To force the program to copy the global IEP notice defaults when his/her “My defaults” box is checked in preferences, the user can hold down the [ALT/OPTION] key as s/he clicks on the “Copy program defaults” button.

If the student’s IEP notice fields (or the IEP consent fields) already contain information, then the program will warn the user that the existing contents will be overwritten.

When editing either student information or IEPs on the web, the user can access separate buttons for “Copy program defaults” and “Copy user defaults”. The location (tabs/pages) for these buttons varies with different IEP form sets.

Appearance (Tab 6)

Items on this tab (Fig. 20) determine the appearance and behavior of SELPA Manager on individual user workstations, principally in the non-web (4D Client) interface. Except for the logo, these settings affect only a particular user account, rather than affecting all program users. Thus, the user named “Administrator” is editing settings that will only revise the appearance and behavior of the program for the login account “Administrator”.

Most of these items also appear as choices on the 4D Client preference dialogs for lower-level-access users.

Set system preferences (admin. user)...

SELPA information | System 1 | System 2 | Web and multi-user | IEP notice defaults | **Appearance**

General

Interface: **Windows 95/98/2000** (dropdown)

Scale forms: (0-100%) Max recent items: (0-50)

Browse font: (6-20)

Browse window initially displays: **All records** (dropdown)

Optional browse fields: Assessmts: **SELPA form code** (dropdown)

☐ Add new record loop
☒ Alternate row banding
☐ Don't guess AC prefix
☐ No browse window
☒ No spelling
☐ No styled browse text
☐ No tool tips
☒ Sort browse lists

IEP and web

Max recs to list: (0-300)

Initial home page: **Display (query)** (dropdown) Sort order: (dropdown)

☐ No student color key Student/upper list: (dropdown)

☒ Items from last IEP IEP/lower list: (dropdown)

Contacts to copy: Main: (dropdown) Second: (dropdown)

Students

In the browse window, show: **Students / assessments** (dropdown) ☐ Transportation only ☐ Student's age today

Student services

Browse list: ☐ Services/Teachers ☒ Services/Students **Standard** (dropdown) ☐ Alt. form

Teachers - staff

Browse list: ☐ Teachers/Services ☒ Teachers/Assignments

Logo

v 4.75311 (serialized, 12 user(s))

Fig. 20. Appearance (Tab 6).

1. Interface (drop-down menu)

The interface affects how buttons, fields, check boxes, and other form elements appear on the user's workstation while running SELPA Manager. If set to “Automatic”, then the program appearance will vary according to the operating system that is running on the workstation.

For Windows, “Windows 95/98/2000” is the default interface when “Automatic” is selected. For Macintosh, “Platinum” is the default interface when “Automatic” is selected. “Platinum” resembles the Mac OS9 interface. The “Mac Theme” setting provides an interface that is more like OS X.

The results of changing the interface setting are immediately visible, and do not affect any program data. However, if the user clicks on the Cancel button instead of Save, to close the preferences dialog, then the interface will revert to its previous setting.

2. Scale forms (0-100%)

This setting allows a user to specify a form size that is larger than standard, for resizable forms. When this setting is a positive percent value, the program will scale the browse window and standard data entry forms by that amount.

Certain elements such as fields on the form may “grow” or “move” to take advantage of the larger size. However, the text on the forms will remain the same size. Minimum data entry form size, except for the IEP forms, is 780 by 576 pixels (width by height).

Therefore, a setting of “10” in this box would result in forms that are 10 percent larger when initially opened, 858 by 634 pixels.

Unlike the other data entry forms, IEP (assessment) data entry forms have a fixed width (approx. 780 pixels) and height. The user can enlarge or reduce the window by dragging the corner, but the objects such as fields on the form will now grow or reposition themselves.

The height of the IEP data entry form varies for specific forms, but is usually longer than the available height on the monitor. Therefore, the program displays a vertical scroll bar during data entry, so that the user can move up or down on the form.

3. Max recent items (0-50)

This item sets the maximum number of recent search items that can appear in the Location box drop-down list, on the browse window.²²

The user types search requests (such as a student's name or a date of birth) into the Location box, and then presses the [ENTER] key.

SELPA Manager remembers recent search items, placing them into the drop-down list for easy recall. The list of recent items will change as the user changes the current focus in the browse window. To turn this feature off, select a value of zero (0) items.

4. Browse font (6-20) (drop-down menu plus numeric entry area)

These two items allow the user to select a custom font and font size for the SELPA Manager browse window. The revised font selection will appear the next time the user changes browse window context, or when s/he opens a new browse window.

5. Browse window initially displays (drop-down menu)

Changing this option will affect the selection of records that appear initially in the upper list, when opening a new browse window, or when changing the browse window context.

²² For more information concerning the Location box, refer to *SELPA Manager Program User's Guide*, p. 180.

The access group to which the user belongs, and/or by school or district access restrictions that apply, may further limit the records displayed.²³

The options available in the drop-down list are limited to only three, if the user is a member of the “TeacherGrp” access group,²⁴

- Current (as of, for me)
- Current (today, for me)
- No records

For users who are not members of the “TeacherGrp” access group, the options in the drop-down list include,

- All records
- Current (as of date)
- Current (as of, for me)
- Current (as of, no DNR)
- Current (today)
- Current (today, for me)
- Current (today, no DNR)
- No records

The lower list of the browse window will be empty when the window first appears or on changing contexts, with one exception: the user performs a search on a context change, and the search results in the display of one (found) record in the upper list. In this case, the lower list will display associated records for the record in the upper list.

6. Optional browse fields: Students (*button*)

The user can create his/her own, custom set of up to 30 student fields to display as columns in the SELPA Manager browse window. Clicking on the “Students” button causes the program to display a dialog for student list configuration (Fig. 21).

The first two columns are reserved for the student's last and first name, and the last six columns are for record creation and modification information. If no fields appear in the custom configuration list on the right side of the dialog, then the student list will appear in its default column order. The user can double-click into the “Col. header” column to change the name of a particular column.

²³ For further information, refer to *SELPA Manager Program User's Guide*, pp. 146, 156.

²⁴ For a more detailed discussion of these options, refer to *SELPA Manager Program User's Guide*, p. 296.

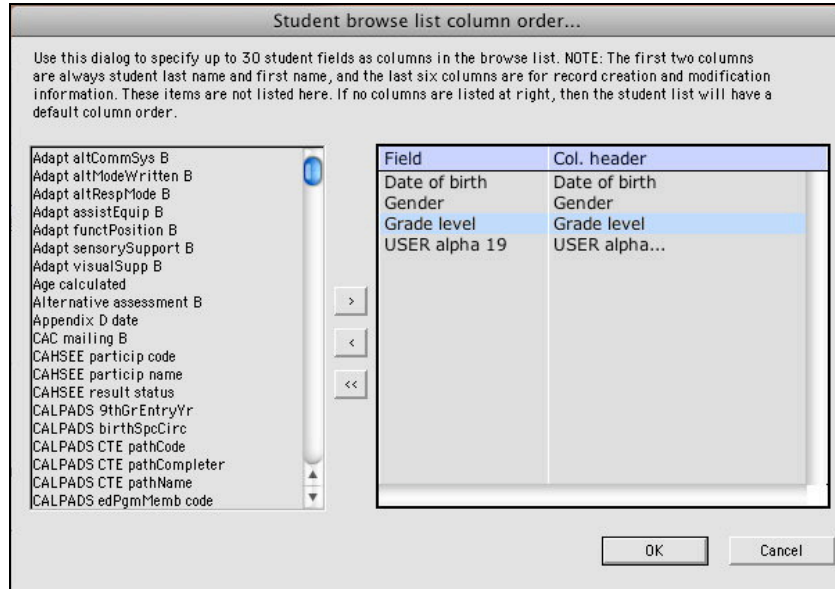


Fig. 21. Custom column order configuration, browse window, student list.

7. Optional browse fields: Assessmts (drop-down menu)

The user can insert a custom, fourth column in the IEP ([Assessments] table) list of the SELPA Manager browse window. The drop-down menu contains the alphabetized names of the fields in the [Assessment] table. Macintosh users with the “Automatic” or “Platinum” interface selected may need to switch temporarily to one of the Windows interfaces, to view all of the fields in the drop-down menu.

Any change that the user makes with this option will not take effect until s/he switches browse contexts, or opens a new browse window.

8. Add new record loop

When this box is checked, the program will add new records repeatedly, without the user having to select New Record from the Data menu each time.

After the user accepts a new record by pressing the SAVE button, SELPA Manager will display another new, blank record for data entry. When finished adding records, the user presses CANCEL when a new (blank) record is being displayed, and the program will return to the browse window.

To add records one at a time, the user should leave this option turned off.

9. Alternate row banding

Selecting this option causes the browse window lists to appear with every other row having a white background. Normally, the browse window lists have a uniformly gray background.

10. Don't guess AC prefix

When this box is checked, SELPA Manager does not insert an area code prefix for the work, fax or “other” telephone number, based upon the area code prefix of a previously-

entered telephone number (e.g., the home or main number). This option affects only certain areas of the program where telephone numbers can be entered: student contact, teacher, and school records.

11. No browse window

Checking this box causes new program windows (File menu -> "New window") to be of the "limited"-type for selecting IEPs, rather than the normal, browse window type. This option may be useful for administrative users that wish to preview, demonstrate, or test the limited interface, without a need to re-connect to SELPA Manager under a different user account.

12. No spelling (4.75 versions only²⁵)

SELPA Manager includes a spelling verification feature that activates when the user moves the cursor out of a text field, where the user has changed the field contents. A dialog appears to identify the word(s) that may be misspelled, along with correction suggestions.

Checking the "no spelling" preference item disables the spelling feature in the 4.75xx versions of SELPA Manager. (Spelling cannot be disabled in the 4.76xx versions.) When the auto-spelling feature disabled, however, you can still check spelling manually, from the Actions menu.

The spelling feature in 4D Client is not related to spell-checking on the web, which is a built-in feature of some web browser programs (Firefox, Safari), and which can be added to others (Internet Explorer).

13. No styled browse text

If the user does not wish to see the stylized text in the browse window, s/he should check this box, and all listed records will appear in plain, black text.

The browse window lists by default display stylized text to indicate conditions that apply to particular records. For example, a student record that has the "DNR" (Do Not Report) box checked is listed in the browse window in red text. A student record that has the "Mark" box checked is listed in italics.

14. No tool tips

When this box is checked, SELPA Manager will not display the "tool tip" contextual help at the end of the cursor, when the cursor lingers over a particular object that has associated help information.

When this box is *not* checked, each tool tip appears for a few seconds and then disappears. The tool tip can be made to reappear if the user moves the mouse away and then back over the same object again.

²⁵ The ability to turn spelling verification on and off, and to manually initiate spell-checking from the Actions menu, is limited to the v.4.75 versions of the program, running with 4D Server 2003. The spelling feature cannot be manually controlled in the 4.76 versions of the program (4D Server 2004).

15. Sort browse lists (*check box and Edit button*)

Checking this preference item causes the program to sort browse list items upon initial display, and when the user changes the browse window from one context to another. The browse list will not re-sort after editing one or more records, however.

The field (column) on which a list is sorted by default will vary with the tables being displayed.

The user can customize the sort for any browse list by pressing the “Edit” button. A dialog will appear that permits sorting on up to four columns per browse window list (Fig. 22). The number entered in each column in the dialog (Sort 1, Sort 2, Sort 3, Sort 4) should correspond to the order of the column as it appears in the browse window.

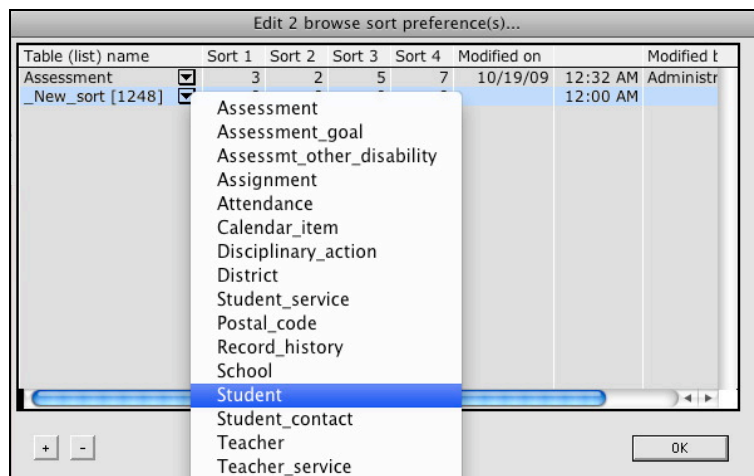


Fig. 22. Custom sort order dialog, browse window lists.

16. Max recs to list (0-300) (*web*)

This setting specifies the maximum number of Student and IEP records to list on the home page. If the number of students or IEPs found exceeds this number, then the program will display “pages” of students, with arrow keys to navigate among the pages.

This setting is functionally identical to the default setting for all users (p. 41), except as an individual setting it overrides the default setting.

17. No student color key (*web*)

Checking this item disables the colored flagging system for the student list on the home page (refer to the “Flags” button, p. 37). The flagging system identifies students that may be overdue (or due soon) for an IEP or an evaluation.

18. Items from last IEP

This preference a legacy item which may be phased out in future versions of SELPA Manager. It determines whether certain information from the most recent IEP is copied onto a new IEP for the same student.

Normally, SELPA Manager only copies current demographic information onto a new IEP, and this information originates with the student (MIS) record, rather than with an

earlier IEP. Checking this box causes the program to collect non-demographic information from other fields on the earlier IEP, and paste it into the new IEP. The items copied from the earlier IEP depend upon the form set in use.

This preference item works only if the most recent, existing IEP is in the same form set as the new IEP, and only for selected form sets (2300, 3013, 3200, 3702, 4100, 4900, 75B4, 909E, 909F, DFLT, DFL6).

This preference is an individual-user setting rather than a system-wide setting. However, the box is only available from within 4D Client, meaning that web users cannot check or un-check it. Prior to v.4.75311, this feature did not work at all on the web; now it can work. However, to avoid confusion with the “Duplicate this IEP” button, the check box is not available from the Preferences link on the home page.

19. Initial home page - Display (query) - Sort Order (*web, 2 drop-down menus for Student/upper list, 2 drop-down menus for IEP/lower list*)

These items configure the initial display and sort order for the administrator account, on the home page. The “Display (query)” drop-down menus function the same way as the “Initial lists, web” drop-down menus do on the Web and multi-user tab²⁶; however, the menus on the Appearance tab are for the administrator's web login only. Lower-level-access users have similar options on their preferences dialogs, both in 4D Client and through the Preferences link on the home page.

20. Contacts to copy: Main – Second (*2 combo boxes*)

When creating an IEP for an existing student, the program copies certain parental contact information, such as the name and address. Some IEP forms contain both a primary and a secondary parental contact.

Because the student record can have multiple contacts associated with it, the program needs criteria to determine which contact(s) to select, to copy onto the new IEP form.

These two combo boxes allow you to specify the type/nature of the principal contact and the secondary contact (where applicable), to be copied to a new IEP form. The items in the combo box list are address types from the contact section of the program ([Student_contact]Address_type), except when preceded with the phrase “RLN:” — in this case, the program looks for a match in the contact relationship ([Student_contact]Contact_relation) field.

21. Students: In the browse window, show (*drop-down menu*)

When you open a new browse window in SELPA Manager (4D Client), the program will open to the Students context initially, displaying the students record list and another, related record list. You can change the related record list from this preference. The options are (upper list / lower list in the browse window),

- Students / Assessments (IEPs)
- Students / Contacts

²⁶ Refer to the discussion of “Initial lists, web” on the “Web and multi-user” tab, p. 14.

- Students / Transitions²⁷
- Assessments (IEPs) / Students
- Transitions / Students

Any change that you make with this option will not take effect until you switch browse contexts, or open a new browse window.

If your current preference does not include IEPs, then you can temporarily change the browse view by typing the word “assessment” or “IEP” into the Location box.

Similarly, if your current preference does not include transitions (ITPs), then you can temporarily change to a browse view that includes them, by typing the word “transition” or “ITP” into the Location box.

When you switch away from and then return to the student context, the browse window will revert to your normal choice.

22. Students: Transportation only

Checking this box causes SELPA Manager to display a limited, transportation-related data entry form (Fig. 23) instead of the standard student data entry form. The form is designed for use by transportation staff (“TransportGrp” access group), but can be accessed by other users.

W3: Students

SPECIAL EDUCATION PLACEMENT AND TRANSPORTATION INFORMATION

[ENTER] key - Save, [ESC] key - Cancel

Enrollment School 1732304 Cleartop High Principal

Student's Name Aguilar, Oscar Birthdate Nov 3, 1991

Teacher Martz, Dean Grade 10 Track Home School 1732304 Cleartop High

Program: ☐ SDC ☐ RSP Start date 00/00/00

Parent Leonor Tapia (707) 279-1200

1 First Street #25 Lakeport (707) 262-0271 Dad's Work #

New Address City Home Phone Mom's Work #

Old Address City

☐ New Student ☐ Regular Student Transport ☐ Change Address

☐ Drop Student ☐ Overflow ☐ Change Time

☐ Change School from ☐ Other

IEP Instructions: ☐ Lift ☐ Seat belt ☐ Harness ☐ Ticket ☐ Wheelchair

☐ CS ☐ Vest ☐ Aide ☐ PT ☐ POP:

If POP is marked: ☐ Hand to Hand ☐ Supervised ☐ Unsupervised

Notes

FOR TRANSPORTATION DEPARTMENT USE

Time	Action	Active	Start on	End on	School at	Mon	Tue	Wed	Thu	Fri

Start Date 00/00/00 ☐ Transport req'd.

Special Instructions

Fig. 23. Transportation-only data entry form for students.

²⁷ “Transitions” is a legacy table in SELPA Manager; it is not relevant to and bears no relationship with the ITP forms in most of the IEP form sets.

While this option is active, the user cannot add new student records. Instead, s/he can only modify existing students' transportation information by double-clicking on the student name in the browse window. For additional discussion of this form, refer to "Transportation-only data form" in the user's guide.²⁸

A setting on the System 1 tab permits more fields to be enterable on the transportation-only form, and allows the user to edit pick-up and drop-off events (refer to the checkbox, "More transport-only fields" on page 21).

23. Students: Student's age today

When checked, this option causes SELPA Manager to display the student's age as of today's date, in years and months, on the first tab of the student data entry form. The age will include the suffix, "[T]" as a reminder that it is referenced to today's date.

When this preference is *not* checked, SELPA Manager will display the student's age in years and months, referenced to the "Age calcs. fm." date. If the "Age calcs fm" date is blank, then the program uses Report As Of date. These reference dates are on the System 1 tab (p. 10).

24. Student services: Browse list (radio buttons and drop-down menu)

When the user switches to the services context in the browse window, by default the program displays student service records in the upper list, and associated students in the lower list (the "Services/Students" radio button).

Clicking on the "Teachers/Services" radio button will change the lower list to display associated teachers, rather than associated students.

The drop-down menu offers three general choices for column order on the services list. The list order changes for the browse window and during editing situations (entering services from the student record or on an IEP). The user must either click on another browse context and then back again, or open a new browse window, to see the new configuration.

- **Short:** Designed for service providers who do not need to (or should not) have access to drop information. The column titles are,

"Dr";"Pry";"DNR";"Teacher";"School";"SVC";"Service name";"Pvdr code";"Provider type";"Orig svc date";"Start date";"Eval date";"Mins";"Freq. code";"Frequency";"SDM";"Sess";"Freq oth";"Loc code";"Location type";"ESY";"Created";" ";"By";"Modified";" ";"By"

- **Standard,** column titles:

"Dr";"Pry";"DNR";"Teacher";"Pvdr code";"Provider type";"School";"Loc code";"Location type";"SVC";"Service name";"Orig svc date";"Start date";"Drop date";"Drop code";"Drop reason";"NP drop code";"NP drop reason";"CSIS exit code";"CSIS exit reason";"Eval date";"Duration desc";"Isolated";"Disab cond";

²⁸ SELPA Manager Program User's Guide, p. 412.

For the DFLT IEP form set, the next set of titles are,

"Rgnl pgm";"Mins";"Sess";"Freq oth";"Class";"Personnel/agency responsible";"INFANTS: Ag. code";"Agency name";"Loc. code";"Location";"Freq. code";"Frequency";"Aux. svc. code";"Aux. svc. loc"

For the 3013 and 75B4 IEP form sets, the next set of titles are,

"Rgnl pgm";"Mins";"Freq-sessions";"Freq oth";"Class";"Session note";"INFANTS: Ag. code";"Agency name";"Loc. code";"Loc. name";"Freq. code";"Frequency";"Aux. svc. code";"Location"

For the 3702, 909E, and 909F IEP form sets, the next set of titles are,

"Rgnl pgm";"Mins";"Sess";"Freq oth";"Class";"Session note";"INFANTS: Ag code";"Agency name";"Loc code";"Loc name";"Freq code";"Frequency";"Aux svc code";"Aux svc loc"

For any other circumstance, the next set of titles are,

"Rgnl pgm";"Mins";"Sess";"Freq oth";"Class";"Session note";"INFANTS: Ag code";"Agency name";"Loc code";"Location";"Freq code";"Frequency";"Aux svc code";"Aux svc loc"

The remaining columns are:

"ESY";"SDM";"LEA dist code";"LEA dist name";"Consult"; "Created";"
";"By";"Modified";" ";"By"

- **Standard-2**, column titles:

"Dr";"Pry";"DNR";"Teacher";"School";"SVC";"Service name";"Orig svc date";"Start date";"Drop date";"Drop code";"Drop reason";"NP drop code";"NP drop reason";"Loc code";"Location type";"Pvdr code";"Provider type";"LEA dist code";"LEA dist name";"Freq code";"Frequency";"Mins";"Sess";"Freq oth";"Duration desc";"Class""Disab cond";"SDM""Eval date";"ESY";"Rgnl pgm";"Isolated";"Consult";"CSIS exit code";"CSIS exit reason";"Inf agency code";"Inf agency name";"Inf loc code";"Inf loc name";"Aux svc code";"Aux svc location";"Session note";"Created";" ";"By";"Modified";" ";"By"

25. Student services: Alternate data entry form

Checking this box causes the program to display a data entry form for student services that has a slightly different arrangement of items. The alternate form does not differ in the number or type of fields displayed, however.

26. Teachers - staff: Browse list (radio buttons)

When the user switches to the Staff context in a browse window, by default the program displays teacher-staff records in the upper list and associated assignments in the lower list.

Clicking on the “Services” option will change the lower list to display associated teacher services, rather than associated assignments. The user must either click on another browse context and then back again, or open a new browse window, to see the new configuration.

27. Logo (“Load” button and entry area, administrative access only)

This entry area allows the administrator to insert a logo or symbol onto the top of printed IEP forms (selected IEP form sets only). You can paste a graphic design from the clipboard or selected it on disk, and press the “Load” button.

You may need to experiment with graphic objects to find one that works well. Simpler designs work best. They should be in the PIC / PICT format and have a rectangular shape.