CLARITY® Process Management System
End User Guide

TRANQUILITY
SOLUTIONS FOR SPECIAL EDUCATION
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About this document

This guide is intended for the CLARITY end user who is responsible for entering student data, creating student Special Education documents or completing Special Education reporting.

Contents

This guide contains the following sections:
• CLARITY® and the Special Education process
• Understanding the CLARITY interface
• Appendix

Related publications

Other components of this documentation set include:
• CLARITY® Installation Guide
CLARITY and the Special Education Process

About this section

This section introduces CLARITY® and how its components are related to the Special Education process.

Contents

The following chapters are contained in this section:

• Overview
• The Referral
• Developing the Individualized Education Plan (IEP) and other Service Documentation
• Understanding the Service Plan
• Maintaining Student Data: Progress Reports, Annual Reviews, Reevaluations and Intermediate Reviews
• Reporting student data
Welcome to CLARITY. This document introduces you to the CLARITY Process Management System and how it helps your district manage and simplify all of your Special Education processes, documentation, and reporting requirements. This chapter explains what CLARITY is and how it relates to the Special Education processes you already understand and use.

The Special Education Process and the CLARITY Process Management System

Special Education is a complex process with timelines and corresponding documents bound by federal and state regulations created to provide the most appropriate educational opportunities for the student. The CLARITY Process Management System is a complete solution designed to mirror that process from intervention to transition and provide a central location for storing all of the related documentation, progress reports and reporting data that is created along the way. This is important because this means CLARITY uses terms and concepts that anyone involved in Special Education can readily understand.

Though each state and district implements the Special Education process differently, the end goal is the same. CLARITY Process Management System does much more than provide electronic versions of the state and district forms, though it certainly does that. It provides the district with a system to manage all of the data compiled during the process. Also since each state and district has its own requirements for Special Education, CLARITY is built to adapt to these diverse needs and timelines.

The following chapters walk the user through the Special Education process and explain how to use CLARITY to handle a particular event. Each chapter is designed to introduce the particular event, explain how CLARITY implements the event within the system and how to use the system to complete the event.

CLARITY has been configured to reflect how your district implements Special Education. This means that when you start a referral for a student, your district’s key timelines and activities that need to be completed are automatically created and assigned to the appropriate staff members. And as you continue through the process these timelines and activities will continue to guide you through any situation that can occur in the Special Education process.

This section contains the following chapters:

**The Referral:** The start of the Special Education process is the Referral. This chapter explains how CLARITY implements the Referral process as an Evaluation/Review and how it is the key to understanding the system.

**Developing the Individualized Education Plan (IEP) and other Service Documentation:** Once a student is determined eligible for Special Education services you need to create an IEP or similar documentation. This chapter describes how the questionnaires in CLARITY help users quickly and accurately complete a student’s documentation.

**Understanding the Service Plan:** This chapter explains the Service Plan and the key role it plays as an extension of the Evaluation/Review and in managing the student’s information.
Maintaining Special Education Data: Progress Reports: Once the student has an active IEP or appropriate document in effect it is time to monitor and maintain that information. CLARITY provides all of the necessary tools for producing Progress Reports. This chapter explains how to complete the Progress Report.

Reviews and Reevaluations: Periodically the student will need changes to his/her Special Education program. Whether the changes are made as part of the student’s Annual Review or Reevaluation process or as an incidental process called an Intermediate Review, CLARTIY has the ability to track each process and all the required documentation it requires.

Reporting on Student Data: This chapter explains how to use the pre-defined reports that are provided in the CLARITY Process Management System to analyze student data to analyze the data collected in your district.
Chapter 2: The Referral

This chapter contains the following topics:

- The Initial Referral in CLARITY
- Steps for Entering the Initial Referral Record
- Scheduling Activities for the Initial Referral Record
- Completing Initial Referral Activities from the Home Page
- Completing the Initial Referral

The Initial Referral in CLARITY

The start of the Special Education process for any student is the referral. In the referral, the district is contacted regarding areas in which the school or parent feels the student is having difficulty. The district’s responsibility is to evaluate these areas of concern and determine if the evaluation results warrant the need for Special Education and/or Related services for the student.

To accomplish this task, your district has developed a step by step process that you follow through which the evaluations are completed, meetings are held and eligibility is determined. These steps must conform to the timelines set up by your state government and IDEA to ensure that the student is evaluated, eligibility determined within a reasonable timeline and services provided appropriately.

CLARITY Process Management System is designed to mirror the referral process by using the Evaluation/Review event. There are several types of Evaluations/Reviews. The Referral falls under the Initial Evaluation category. Who enters this evaluation (referral) into CLARITY is up to your district. It may be the school psychologist that is overseeing the evaluation process or an administrative assistant who is responsible for receiving the paperwork from the school and assigning the necessary evaluations to the appropriate staff members. No matter how your district operates, CLARITY can be adapted to allow the appropriate staff member access to complete his/her job.

Through the use of the Evaluation/Review, CLARITY assists your district in making sure all the required tasks/activities of the referral are completed within the required timeline by assigning the tasks/activities to the appropriate staff member and providing that staff member with a due date for completion that falls within the state defined guidelines. These assigned tasks/activities appear on the staff member’s Home Page creating an electronic “to do” list for each staff member. As the staff member completes their assigned tasks, they are marked complete on their Home Page with the associated date of completion, much the same way you would cross out an item on the handwritten “to do” list. An added bonus to marking items complete on the staff’s Home Page is the ability CLARITY has to enter the completed date in the appropriate field on the Initial Evaluation/Review screen for the user, negating the need for duplicate data entry.

CLARITY also has the flexibility of being able to house documents that are completed as a result of the referral. Referral forms, permission to evaluate and evaluation results can be attached to the student’s referral record much as you would attach a document to an email. This allows the district to keep all relevant documents for the referral in one central location for ease of retrieval.

Each student may have only one Initial Referral (Evaluation/Review) in the application which is logical since each student can only have one initial evaluation to Special Education. Any other
evaluation or review the student may have will be tracked separately through an Annual Review, Reevaluation or Intermediate Review. For more information on these reviews see Chapter 6: “Reevaluations and Reviews” in this section.

Before you can begin the Initial Evaluation the student must have a record in CLARITY. If the student’s record does not exist, and you do not have permissions to enter the student, contact your CLARITY Administrator. For steps on entering a student into CLARITY see Chapter 3: “Entering a Student Record” in Section 3 of this guide.

Steps for Entering the Initial Referral Record

**NOTE**: The sample CLARITY™ screens shown in this guide may look different than the screens that actually appear on your desktop. In addition, procedures in this guide may reference CLARITY menus that are different than a particular user’s. This is because the administrator likely modified the system to meet the school’s or district’s needs.

The sample screens and procedures are intended to convey conceptual information. The specific steps vary, depending on the CLARITY system configuration.

Beginning the Initial Referral Record

1. Locate the Sidebar menu that contains the **Add an Initial Evaluation** option.

2. Click the down arrow next to the Sidebar menu to open the menu, and then click **Add an Initial Evaluation**. In the examples shown in this procedure, the Add an Initial Evaluation option is on the Evaluations & Reviews sidebar menu. Your menu may be different depending on how your district configured the menus for your user group and your responsibilities in CLARITY.

   Figure 2-1: Evaluations & Reviews Menus
3. On the Referral data entry screen, select the student for whom you are creating the referral. (For more information on finding students see the Chapter 4: “Finding a Student” in Section 3 of this guide.)

4. The following blank Evaluation/Review screen appears:

Figure 2-2: Initial Evaluation Screen

<table>
<thead>
<tr>
<th>Detail</th>
<th>Activities</th>
<th>Evaluations</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Student:</em></td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

| *Referral Date:* | (none) | [ ] |
| Referrer By: | (none) | [ ] |
| Name: | [ ] |
| *Status:* | A - Active | [ ] |
| Completion Date: | [ ] |
| *Case Manager:* | [ ] |
| Suspected Disability: | (none) | [ ] |

Areas for Evaluation:
- A - Academic performance
- B - Braille needs
- C - Eye condition
- E - Educational Functioning
- F - Functional evaluation
- G - General intelligence
- H - Health
- I - Intellectual impairment
- J - Learning disabilities
- K - Adaptive behavior
- L - Communication needs
- M - Communication needs
- N - Communication needs
- O - Motor abilities
- P - Physical examination
- Q - Reading and writing skills
- S - Social and emotional status
- T - Assistive technology needs
- U - Audiological status
- V - Vision

Parental Consent To Evaluate:
- Status: [ ]
- Date: [ ]

Eligibility:
- Determination: (none) [ ]
- Date: [ ]

<table>
<thead>
<tr>
<th>Rank</th>
<th>Disability</th>
<th>Date</th>
</tr>
</thead>
</table>

5. Complete the required fields on the screen indicated by the red diamond (●). These fields are:
   a. **Referral Date** - You can use the Calendar icon [ ] to select a specific date.
   b. **Referral Status** – This field defaults to Active
   c. **Case Manager** – Indicate the staff member responsible for coordinating this referral. For some states, this field may be labeled Evaluation Coordinator.

**NOTE:** Your district will define what you should use as the **Referral Date** for each student. Be sure you are aware of the date to be used and the implications (if any) this date has on your Special Education (SPED) timelines.
6. Enter the Areas for Evaluation required for this student by clicking the box to the left of the area of concern.

**Figure 2-3: Areas for Evaluation**

<table>
<thead>
<tr>
<th>Areas for Evaluation</th>
<th></th>
</tr>
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<tr>
<td>A - Academic performance</td>
<td>I - Hearing</td>
</tr>
<tr>
<td>B - Basic needs</td>
<td>J - Adaptive behavior</td>
</tr>
<tr>
<td>C - Eye condition</td>
<td>K - Functional vocational skills</td>
</tr>
<tr>
<td>E - Educational Functioning</td>
<td>L - Communicative status</td>
</tr>
<tr>
<td>F - Functional evaluation</td>
<td>M - Communication needs</td>
</tr>
<tr>
<td>G - General Intelligence</td>
<td>N - English proficiency</td>
</tr>
<tr>
<td>H - Health</td>
<td>O - Motor abilities</td>
</tr>
</tbody>
</table>

**NOTE:** The areas chosen may determine specific evaluations to be launched by the application. For example, if General Intelligence is chosen as an Area for Evaluation the corresponding task/activity “Complete General Intelligence Evaluation” will be launched to the appropriate staff member.

**NOTE:** For those states that use the Suspected Disability in addition to Area for Evaluation, selecting the appropriate Suspected Disability will automatically select the appropriate Areas for Evaluation. Areas can be selected/deselected as needed.

**Scheduling Activities for the Initial Referral**

Once the evaluation record is entered, tasks/activities need to be scheduled. As stated earlier, the CLARITY Process Management System has the ability to schedule the tasks/activities required to complete the Initial Referral process and notify staff members of their tasks via their Home Page.

Depending on the amount of data at hand when the referral information is entered and the responsibilities of the staff member entering the evaluation, it may or may not be possible to assign all activities at the time the referral is created. CLARITY anticipates both situations by allowing activities to be launched at any time during the referral process. For example, if all Special Education (SPED) staff members who need to complete evaluations and attend the meetings are known when the Referral is entered, the activities may be launched at that time. If all staff members are not yet known, the Referral may be saved and the activities launched at a later date.

It is also possible to reschedule activities should the student transfer to another school during the Initial Evaluation process, thus changing the staff responsible for the evaluation activities or if additional Areas of Evaluation are selected. **It is important to note that when a user chooses to reschedule activities, any completed activities will be overwritten and new activities will be sent out.** Although timelines and due dates are not affected by the rescheduling of activities screen data (i.e., any dates) for any completed tasks in the evaluation process will be lost. The district must decide on a case by case basis if the loss of data is significant enough to warrant reassigning any incomplete activities manually rather than rescheduling all activities.

**NOTE:** If activities are rescheduled, any documents already generated and attached as part of the evaluation process up to the point the activities are rescheduled would remain unaffected as well as any responses provided. For example, if a letter inviting parents to a meeting has been generated and attached, rescheduling activities will not delete the letter or change any information in that document.
**Best Practice:** If the decision is made to reschedule activities, it is in your best interest to print the Activity screen prior to pressing the Schedule Activities button. Printing the activities will ensure the correct dates are entered into those activities already completed.

Steps for Scheduling Initial Evaluation Activities

**If the referral has advanced to the point where tasks/activities are ready to be assigned:**

1. Click the Activities tab at the top of the evaluation screen.
2. Click the **Schedule Activities** button. The tasks/activities for the initial evaluation will be scheduled and assigned to the appropriate staff member.

![Schedule Activities](image)

3. If any activities are left unassigned or an activity’s assignment must be changed, open the line item to assign the correct staff member to the task/activity.
4. After the correct staff member has been assigned to the task, close the line item.
5. Click the **Save** icon at the top of the CLARITY™ workspace to save the referral information.

Once activities are scheduled, the student’s name will appear on the case manager’s Home Page under the section “**Evaluations/Reviews with Scheduled Activities**”. For more information on using this Home Page feature, see Chapter 4: “Scheduled/Unscheduled Activities” in this section.

**If you do not schedule the activities at the time the referral is entered:**

1. Click the **Save** icon at the top of the CLARITY™ workspace to save the referral information.
2. A message will appear reminding you that activities have not yet been scheduled. If you wish to wait to schedule activities, click OK.

![No activities scheduled](image)

3. When ready to schedule the activities, return to the student’s Initial Evaluation screen and follow steps 1-5 above.

Once the Evaluation/Review is saved, the student’s name will appear on the case manager’s Home Page under the section “**Evaluations/Reviews with Unscheduled Activities**”. For more information on using this Home Page feature, see Chapter 4: Scheduled/Unscheduled Activities in this section.
Completing Initial Referral Activities from the Home Page

Once the tasks/activities for the Initial Referral have been launched, staff members will be notified of their assigned tasks on their Home Page. Tasks will be arranged into Past Due, Due and Future Due activities.

Figure 2-6: Home Page activities

Activities appear in 2 ways on the Home Page, those in **black** font and those in **blue** font. The activities in **blue** font are links which take the user directly to the screen or questionnaire within CLARITY for which their task/activity needs to be completed. In the Figure 2-6 above, **Complete Initial IEP** in the Future Due activities is a link. Clicking on the link will take the user directly to the IEP questionnaire so they can begin to answer the questions in the questionnaire.

When the task/activity has been completed, the user must mark it complete on the Home Page.

To mark activities complete on the Home Page:

1. Click the checkbox next to the task/activity completed.
2. Enter the date completed in the Date Completed field below the section containing the activity.
3. Click the **Complete** button.

The task/activity will drop off the user’s Home Page.

Many of the activities on your Home Page may be set to auto fill fields on the Evaluation/Review screen. This means that it is **vital** that the user enter the actual date the activity was completed in the Completed Date field. Otherwise, the field on the Evaluation/Review screen may be filled with the incorrect date.
Completing the Initial Referral

Once the Referral process is complete, the status of the Evaluation/Review record must be changed to reflect this completion. Students will fall into one of three categories at the completion of the referral:

- Not eligible, no Service Plan created
- Not eligible, Service Plan created and no longer needed
- Eligible, Service Plan created

**IMPORTANT:** The Evaluation/Review status is not changed until the entire Referral process is completed. This includes the determination of eligibility and completion of the IEP if it is decided that evaluations are necessary for the student.

Changing the Evaluation/Review status for ineligible students with no draft IEP:

1. Locate the Sidebar menu that contains the **Modify an Initial Evaluation** option.
2. Click the down arrow next to the Sidebar menu to open the menu, and then click **Modify an Initial Evaluation**.

   ![Figure 2-8: Evaluation/Review Menu](image)

3. On the Initial Evaluation (Referral) data entry page, select the student for whom you are modifying the referral. (For more information on finding students see Chapter 4: “Finding a Student Record” in Section 3.)
4. On the Initial Evaluation (Referral) data entry screen change the **Referral Status** field from “Active” to “Not Eligible” and enter the date the Initial Referral process was completed.
5. Click the **Save** icon at the top of the CLARITY™ workspace to save your data.

### Changing the Evaluation/Review status for ineligible students with a draft IEP:

These steps will be necessary for students who have been found ineligible, but for whom a DRAFT IEP, and therefore an In-development Service Plan, has been created and for whom the data in the IEP does not need to be kept.

1. Locate the Sidebar menu that contains the **Modify a Service Plan** option.
2. Click the down arrow next to the Sidebar menu to open the menu, and then click **Modify a Service Plan.**

3. At the top of the Service Plan data entry page, select the student for whom you are modifying the Service Plan. (For more information on finding students see Chapter 4: “Finding a Student Record” in Section 3.)

4. On the Service Plan data entry screen change the status of the Service Plan from In-Development to History. This will allow you to keep any information entered for the student during the process in the CLARITY application for future reference.
5. A warning will appear reminding you that you must enter the Termination Date and Termination Reason on the bottom of the Service Plan screen before you can change the status from In-development to History.

5. Using either the Go or context menu, go to be redirected to the student’s Evaluation/Review screen and change the status from “Active” to “Completed”. See steps 3 & 4 in the previous section for further information.

NOTE: If the data in the IEP questionnaire needs to be kept, the user should change the Service Plan status to HISTORY and then inactivate the student. For more information on changing the Service Plan status, see Chapter 4: “Understanding the Service Plan” in this section.

Changing the Evaluation/Review status for eligible students:

The Evaluation/Review status for students that complete the referral process and are found eligible should be changed only after the Service Plan containing the student’s services has been set to “Current” and the data it contains is locked down. When the Service Plan has been locked, a warning will appear reminding the user that the Evaluation/Review associated to the Service Plan has not been completed.

Completing the Evaluation/Review will automatically drop all incomplete activities off the Home Page. Once the Service Plan has been set to Current, you may want to verify that all activities have completion dates before setting the Evaluation/Review record to “Complete”. You can verify all activities are complete by clicking on the Activities tab of the Evaluation/Review screen.

To change the Evaluation/Review status for a “Current” Service Plan:
1. Locate the Sidebar menu that contains the Modify an Initial Evaluation option.
2. Click the down arrow next to the Sidebar menu to open the menu, and then click Modify an Initial Evaluation.
3. On the Initial Evaluation data entry page, select the student for whom you are modifying the referral. (For more information on finding students see Chapter 4: “Finding a Student Record” in Section 3.)

4. On the referral data entry screen change the Status field from “Active” to “Completed” and enter the date the Evaluation/Review process was completed.

5. Click the Save icon at the top of the CLARITY™ workspace to save your data.
Chapter 3: Developing the IEP and other Service Documentation

This chapter contains the following topics:

- The IEP and other Service Documentation
- Starting the IEP Questionnaire
- Finishing the IEP Questionnaire
- Printing the IEP and Other Service Documentation
- Opening the IEP Document from Within CLARITY

The IEP and Other Service Documentation

Special Education is a process. The result of this process for eligible students is a series of key documents detailing a student’s services. Creating this documentation is a process in and of itself with milestones, timelines and other variables that affect what is created. CLARITY reflects each district’s particular method for developing the IEP, using the district’s own forms. CLARITY does not force the user to pull up an electronic form and start filling it in. Rather, it uses the Questionnaire to enhance and simplify IEP development.

This chapter explains

- CLARITY’s use of the Questionnaire to assist in the documentation process
- How the Service Plan fits into the process and the central role it plays in managing information.
Understanding the questionnaire and document

The Questionnaire guides you through the process of writing the IEP. Instead of simply displaying a form, the Questionnaire breaks the form down into a series of questions that it presents to the user to answer. The Questionnaire only presents questions appropriate to each student’s needs, saving time and effort. For example, if a student needs ESY, the Questionnaire will present questions relevant to ESY. Otherwise, it will bypass those questions.

CLARITY is also flexible enough to request additional information that might be needed for state reporting or to complete a different document (such as a transportation form) in the IEP questionnaire. This allows the district staff to gather their state reporting information as part of the normal process instead of requesting teachers gather and submit that data at a later date. Consider the depiction of the IEP meeting below.

As shown above, once the Special Education information is gathered at the meeting through the IEP questionnaire, CLARITY transfers the data elements to the CLARITY screens, district forms or related reports on which it is needed. In some instances the data may be transferred to all 3 areas. For example, all the Special Education information being discussed in the meeting above will be entered into the IEP questionnaire. As it is being entered into the questionnaire, IEP Meeting Date dates Case Manager and Eligibility will be transferred into the Evaluation/Review screen. Time w/ Non Disabled Peers, Placement, Services, Accommodations/Modifications,
Testing, and ESY are all transferred to the Service Plan screen. Once this data resides on the Service Plan screen, it can be extracted when creating state and district reports. Additional information entered into the questionnaire, in this example Transportation or Transition data, can be used to complete district forms.

Creating the IEP Document

Once you’ve completed a Questionnaire you tell CLARITY to take the information you entered and generate the actual form. For example, after answering all the questions in the IEP Questionnaire you tell CLARITY to use that information to generate the actual IEP document as an Adobe® Acrobat file (.pdf). In Figure 3-1 you’ll see a sample IEP Questionnaire.

![Figure 3-1: A Sample Questionnaire](image)

Selecting the Preview button produces an Adobe® Acrobat version of the district’s form with the answers populated in the correct location. Unless all required answers have been provided, a DRAFT version of the document will be created as seen in Figure 3-2.
A district may have several Questionnaires, one for each form used in the SPED process. This chapter will describe a general IEP Questionnaire. Your Questionnaire may look different if it has been customized to your district’s specifications. Regardless of differences in appearance, the principles presented in this chapter are universally applicable.

NOTE: To complete a Questionnaire, your student’s record must already exist in CLARITY and the student must have an active Evaluation/Review.

CLARITY™ also requires the student record to have a Service Plan attached to it prior to beginning an IEP questionnaire. If a Service Plan does not exist at the time the user begins the Questionnaire, CLARITY™ automatically creates one marked “In-development” for you. If you already have an “In Development” Service Plan, CLARITY™ associates the IEP you are creating with that Service Plan. For more information on Service Plans see Chapter 4: “Understanding the Service Plan” in Section 2 of this guide.

Starting the IEP Questionnaire

Use the following procedure to start an IEP Questionnaire.

To start an IEP Questionnaire:
1. Open the appropriate Sidebar and click the IEP Questionnaire icon.
2. Select the appropriate student. (For information on how to find students, see “Finding a Student Record” in Chapter 4 of Section 3.) This displays the beginning of the Questionnaire.

**REMARKER:** All fields marked with a red diamond must be filled in before a final IEP can be created.

**BEST PRACTICE:** As you walk through the IEP Questionnaire, you will see other required fields. You can use the Validate button to see if you’ve completed all required fields. If any required fields are missing information, you cannot submit the IEP as final. It is also a good idea to Validate once you finish the questionnaire since it will not only check all required fields in the IEP, but also clear any unnecessary answers entered into the questionnaire.

3. Fill in the appropriate fields, and then click **Next** to continue to the next question in the Questionnaire. You can use the **Next**, **Previous** or **End** buttons to navigate through the Questionnaire.

**Figure 3-4: Questionnaire Screen**
To start the IEP questionnaire from the Home Page

You may also start the IEP questionnaire from the “Activity” area of your Home Page. For most users, the task “Complete the IEP” will be one of the tasks assigned on the user’s Home Page.

To start the IEP from here, click the description of the task. The description is a link which will redirect you to the beginning of the questionnaire for the student for whom the task is required. This is the easiest, most efficient way to start the questionnaire since it does not require you to find the student before starting the questionnaire. (For more information on activities and the links provided on the Home Page, see “Completing Initial Referral Activities from the Home Page” in this chapter.)

In addition to using the Previous and Next buttons on the IEP Questionnaire toolbar, you can navigate through the questions by using the ‘Go to’ area of the screen.

Figure 3-5: ‘Go to’ area of IEP Questionnaire

The ‘Go to’ area contains a drop-down list of questions contained in the IEP Questionnaire. You can use this list to navigate to a particular question instead of paging through the entire Questionnaire. The total number of questions displayed (such as “1 of 45” in Figure 3-5 above) may vary, depending on how you answer certain questions. The question numbers in the “Go to” box will always remain the same and should be used when reporting issues to Support.

For more information on answering the different types of questions in the questionnaire, see “Types of questions in the questionnaire” in Chapter 5 of Section 3 in this guide.

Finishing the IEP Questionnaire

When you reach the end of the IEP Questionnaire, CLARITY will automatically validate the questionnaire to determine if any required responses are missing. If there is mandatory information missing, CLARITY™ generates a list of unanswered questions similar to Figure 3-6 below.

Figure 3-6: Summary of unanswered questions

Each question title is a link back to the question itself. If you click the question title you will be redirected to the appropriate question screen where you can enter your answer.
Until all required responses to the questionnaire have been supplied you will only be able to generate a draft document. It is a good idea to continue to Validate as you enter the missing information since additional required questions may be presented depending on how you answer each question.

Printing the IEP

You may print the IEP document at any time during the process. However, if all mandatory information has not been provided (See “Finishing an IEP Questionnaire” above) you will only be able to print a draft copy of the document. The draft copy will have a DRAFT watermark on every page of the document. Since draft copies are subject to change, the generated draft document is not saved and attached in CLARITY.

To print a final version of the document, all mandatory information must exist in the questionnaire. Final copies of the IEP are saved as attachments to the Service Plan of the student’s record. These documents can be opened, read and printed at any time in the future.

To print an IEP or other document within CLARITY for the first time:

1. Locate the Sidebar menu that contains the generate IEP document option. Click the down arrow next to the Sidebar menu to open the menu, and then click IEP.

   Figure 3-7: Service Plan Menu

   ![Service Plan Menu]

2. The document submission screen will appear

   Figure 3-8: Document Submission Screen

   ![Document Submission Screen]

3. If all mandatory answers have not been provided, only a draft version of the document will be available as seen above in Figure 3-8. In this figure, the checkbox has been disabled allowing only a draft to be generated.

4. Click Submit. A draft version of the document will be generated. The document will have the DRAFT watermark visible on each page of the document.
5. For printing a final version, once the IEP questionnaire has been successfully validated, click the Final Version checkbox before clicking the Submit button.

Opening an IEP Document from within CLARITY

Once the final IEP has been submitted, it is not necessary to submit it each time you want to review the document. Once submitted the IEP document is attached to the student’s record as part of the student’s Service Plan. For more information on the Service Plan, see Chapter 4 of this section, “Understanding the Service Plan”.

To open an IEP document within CLARITY:

1. Locate the Sidebar menu that contains the Service Plan command. Click the down arrow next to the Sidebar menu to open the menu, and then click Find a Service Plan.
2. Use the Find feature to find the child whose IEP you would like to open. (For more information on finding students see Chapter 4: “Finding a Student Record” in Section 3 of this guide.)

3. The Service Plan Screen will open.

   Figure 3-12: Service Plan Screen

   ![Service Plan Screen]

   - Begin Date:
   - End Date:
   - Status:
   - Evaluation / Review:
   - IEPE Case Manager:
   - School of Attendance:
   - Grade for this IEPE:
   - Placement Type:
   - Transportation:
   - Equipment:

4. Click the Attachments tab. The IEP document will be listed on the Attachments tab.

   Figure 3-13: Attachments tab

   ![Attachments tab]

   - Attachments

5. Click the icon. The Adobe® document will open for reviewing or reprinting. Adobe® documents are “read only”. Any changes to the document must be made through the questionnaire.

   **Reminder:**

   Once the Evaluation/Review is completed you do not need to resubmit the IEP each time you want to read the document. Simply use the Attachments tab of the Service Plan to open the attached IEP.

   It is important to note that only one IEP is attached to each Service Plan. If errors exist in the generated document resulting in the need to regenerate the IEP document, the newly generated document will overwrite the existing attached document. The new document will be saved with the new generation date.
Chapter 4: Understanding the Service Plan

The Service Plan is an integral part of the CLARITY application. It is designed to be the collection point for data that is used in day to day Special Education operations and for data required for state reporting. Once completed, the Service Plan provides a real time snapshot of the student’s SPED record. Information from the student’s eligibility and most recent review are included in the student’s Service Plan as well as a detailed summary of all the student’s services (educational, related and supplemental). The Service Plan also provides users with instant access to the student’s IEP and other service related documents.

This chapter contains the following topics:

- The Service Plan as an Extension of the Evaluation/Review
- The Role of the Service Plan
- Service Plan Status
- Viewing the Service Plan Screen

The Service Plan: An Extension of the Evaluation/Review

The Service Plan is considered an extension of the Evaluation/Review. Unless an Evaluation/Review has been created for the student, there can be no Service Plan. Likewise an Evaluation/Review may only have one Service Plan associated to it.

The connecting point for the Evaluation/Review and the Service Plan is the IEP questionnaire. If the Evaluation/Review results in the determination of eligibility (or the continuation of the previous eligibility) the Evaluation/Review continues with the determination of services and documentation of this information through the IEP. As the IEP Questionnaire is started in CLARITY, the application recognizes the need to gather and store much of that information for reporting purposes and creates the Service Plan, an extension of the Evaluation/Review, to store that data.

The Role of the Service Plan

The Service Plan is the glue that ties the service related documents to the evaluation and serves to summarize the information found in these documents. Special Education services, transition services, extended school year, testing accommodations and modifications, and general curriculum accommodations and modifications can all be viewed from the Service Plan screen.

**NOTE:** Goals and Objectives cannot be viewed from the Service Plan screen. They are, however, viewable through the IEP document and the Progress Report which is attached to the Service Plan.
The Service Plan as a collection point for data.

The Service Plan begins to collect data when the IEP (or other relevant questionnaire) is started. As the questionnaire is begun, the application recognizes the need to store pieces of data from the questionnaire and as a result automatically creates a Service Plan in the **In-development** status. As the questionnaire is completed, the data entered that is required for the Service Plan is automatically transferred from the questionnaire to the correct field on the Service Plan screen. This feature prevents the need for double data entry into CLARITY, allowing for more efficient use of time for the district. (For more information on the types of Service Plan status, see the “Service Plan Status” heading below.) Figure 4-1 illustrates the Special Education Services question in a questionnaire and the corresponding data found on the Service Plan screen.

**Figure 4-1: IEP Screen - SPED Services**

<table>
<thead>
<tr>
<th>Service</th>
<th>Area of Specially Designed Instruction</th>
<th>Continued Services?</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Responsible Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 - Instruction-Direct</td>
<td>1 - Reading</td>
<td></td>
<td>8/17/2006</td>
<td>8/14/2007</td>
<td>Marlene, Paige [Teacher (101-061)]</td>
</tr>
<tr>
<td>01 - Instruction-Direct</td>
<td>3 - Math</td>
<td></td>
<td>8/17/2006</td>
<td>8/14/2007</td>
<td>Marlene, Paige [Teacher (101-061)]</td>
</tr>
</tbody>
</table>

**Figure 4-2: Service Plan Screen - SPED Services**

<table>
<thead>
<tr>
<th>School</th>
<th>Minutes per week</th>
<th>Outside General Ed Class?</th>
<th>Include in Total Service Time?</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hillside Elementary School (1999)</td>
<td>300</td>
<td></td>
<td></td>
<td>2 - Resource/Related Service Room</td>
</tr>
<tr>
<td>Hillside Elementary School (1999)</td>
<td>150</td>
<td></td>
<td></td>
<td>2 - Resource/Related Service Room</td>
</tr>
</tbody>
</table>

Information collected in the Service Plan includes, but is not limited to:

- Reevaluation and Annual Review dates
- Bus equipment
- Least Restrictive Environment
- Time with non-disabled peers (shown as a percentage for determining LRE)
- Special Education Services and hours
- Related Services and hours
- Supplementary Aids & Services
- Supports for School Personnel

The following items are gathered on the Service Plan and viewable by using the Context Menu at the top of the Service Plan screen.
- Transition Services
- Extended School Year Services
- General Curriculum Accommodations & Modifications
- Testing Accommodations and Modifications

As you can see, the Service Plan provides an “at a glance” look at pertinent information in the IEP and other district forms. Instead of pulling out a document each time you need to review information on the student, opening the Service Plan provides the same information clearly and concisely. And, access to the data in the Service Plan’s table-like format prevents the user from flipping through numerous pages to find the one piece of information that is needed.

The Service Plan as an organizer of data

As the Service Plan gathers the student’s SPED data, data is organized in a way that makes it simple for the user to find the information they need. The Service Plan screen is composed of tabs which manage different types of information and the Context Menu on the top of the screen that provides links to additional data screens.

Figure 4-3: Service Plan Screen
Having a specific area within CLARITY in which all this data is centrally managed makes it easy for staff members to see the majority of the student’s SPED information without having to open the IEP document. This allows for easy retrieval of the data on a daily basis and prevents the district from doing double data entry for data that needs to be gathered for state reporting purposes.

The Service Plan as a control point in CLARITY

The final and most important role of the Service Plan is as a control point for service related data. Once the Eligibility has been determined for the student, the IEP meeting held, and the IEP document signed, the Service Plan status is changed to reflect the completion of the data gathering process and the fact that the placements/services agreed upon in the IEP meeting are now the current services the student is receiving.

This is accomplished by changing the Service Plan status from In-development to Current. Changing the status to Current alerts CLARITY that the information contained in the Service Plan has been agreed upon and signed off on by the IEP team and services may not be changed without the team meeting again. To make sure that the information is not inadvertently changed in CLARITY without following the proper Evaluation/Review procedures, the Service Plan information is locked when the status is changed to Current. By locking this data, the district can be sure that state reporting data remains correct and intact and users cannot make changes to student data without following proper procedures.

When the Service Plan status is changed to Current, locked data on the screen becomes grayed out and inaccessible.
Fields containing information that does not affect the services agreed upon in the IEP meeting or state reporting data may be changed even though the Service Plan is locked. These fields will remain in black font and will vary from state to state.

“Locked” items may vary from state to state depending on state reporting requirements.

**Ramifications of not changing the Service Plan to Current**

It is important to understand the ramifications of not changing the Service Plan to current for a student.

- Progress Reports are only available for students who have Current Service Plans.
- Only Current Service Plan data will be included in state reporting.
- Users have the ability to change the IEP and therefore student data in CLARITY without following the procedures designed in CLARITY to track a student’s Special Education history.

**Service Plan Status**

Because information is entered into the Service Plan throughout the Special Education process the Service Plan has several statuses. These statuses correspond to the point in the SPED process the student is currently involved in.

**In-development:** This status is applied to a Service Plan that is currently in progress and gathering information. A student with an In-development Service Plan will have an active Evaluation/Review in CLARITY. Service Plans in this status do not have the necessary information for state reporting or have incomplete information in a critical questionnaire and cannot be made Current.

An In-development Service Plan is the only type of Service Plan that can be modified, since it is the status in which information is gathered to prepare the IEP and other crucial documents. **There can be only ONE In-development Service Plan for a particular student.**

**Planned:** A Planned Service Plan is one that has all required data and whose IEP is complete, but is not ready to become the Current active record for the student. This is used in situations where the student is already being served under a Current Service Plan and another Service Plan has been completed but is not ready to be implemented. An example of a Planned Service Plan would be the Service Plan created for an Annual Review held in April that will not be effective until August. The Evaluation/Review associated to the Planned Service Plan has a status that reflects completion of the Evaluation/Review.

Data in a Planned Service Plan is locked since the IEP meeting agreeing on the services has been held and the IEP signed. The Planned Service Plan is only waiting for the beginning date to arrive to become the student’s current record. **There can be only ONE Planned Service Plan for a particular student.**

**IMPORTANT:** A utility program can be run outside of CLARITY that will change all Planned Service Plans to Current based on the Service Plan’s begin date. It is run on the web server with the results viewable via the Scheduled Process Log, a predefined report in CLARITY. For more information on running this utility, see CLARITY 1.7.7 Release Notes or contact tsisupport@spectrumk12.com.

**Current:** A Current Service Plan is the legal current record for the student. Once a Service Plan is set to Current, the IEP document and Service Plan screen data is locked down and cannot be changed. This makes sense since the IEP becomes a legal document and the Service Plan is a
reflection of what is found in the IEP. The Evaluation/Review associated to the Current Service Plan should have a status that reflects completion of the Evaluation/Review.

The Service Plan remains Current and active according to the Begin and End Dates specified in the Plan. **There can be only ONE Current Service Plan for a particular student.**

**History:** A History Service Plan is exactly that, a historical record of the student’s previous plans. These records are naturally locked and cannot be changed, though they are available for review. This is an important feature as it provides the ability to track a student’s progress throughout his time in Special Education. **There can be any number of Service Plans marked History.**

The Evaluation/Review associated to the History Service Plan will have a status that reflects completion of the Evaluation/Review.

---

**Viewing the Service Plan Screen**

To open a **Service Plan** within CLARITY:

1. Locate the Sidebar menu that contains the **Service Plan.** Click the down arrow next to the Sidebar menu to open the menu, and then click **Find a Service Plan.**

   **Figure 4-7: Service Plan Menu**

2. Use the Find feature to find the child whose Service Plan you would like to open. (For more information on finding students see Chapter 4: “Finding a Student Record” in Section 3 of this guide.)

3. The Service Plan Screen will open.

**Service Plan Detail Tab**

The detail tab contains basic service information. The screen shown in Figure 4-8 contains the following **required** fields:

- **Begin Date:** This field reflects the beginning date of the Service Plan. This date is usually the begin date of the IEP.
- **End Date:** This field reflects the ending date of the Service Plan. This date is usually the end date of the IEP.
- **Type:** This field is filled by a district defined table, Service Plan Type. Selecting the correct type is important as it determines whether goals and/or attached documentation are required in order to set the Service Plan to Current.
- **Evaluation/Review:** This field shows the Evaluation/Review that the Service Plan is connected to. If the Service Plan is auto generated when the questionnaire is started, this field is automatically filled with the active Evaluation/Review. The user
may also use the button to the right of the Evaluation/Review field to be redirected to the Evaluation/Review the Service Plan is attached to.

- **IEP Case Manager:** This field should reflect the name of the individual who is responsible for overseeing the implementation of the student’s IEP. This is usually the student’s Special Education Teacher. Should the student have more than one Special Education Teacher, the Case Manager would be the teacher with the ultimate responsibility for seeing that the IEP is implemented correctly.

- **School of Attendance:** This field is defaulted from the student’s personal information screen. It will reflect the attending school pulled from the district’s student information system.

- **Grade for this IEP:** This field is filled from a question within the IEP questionnaire. It will reflect the grade the student will be in during the implementation of the IEP.

- **Next Annual Review Date:** Although not required, this date is used to automatically create the next Annual Review record for the student according to district timelines. Without this date the next Annual Review record must be created manually.

- **Next Reevaluation Review Date:** Although not required, this date is used to automatically create the next Reevaluation Review record for the student according to district timelines. Without this date the next Reevaluation Review record must be created manually.

### Additional Screen Items

**Enrollment School:** Feeds forward from the Student Personal Screen. This field may be changed here for the purpose of writing the IEP only. Unless the change is also made in the Student Information System (SIS) the change will be overwritten during the nightly SIS refresh.

**Grade:** Feeds forward from the Student Personal Screen. This field may be changed here for the purpose of writing the IEP only. Unless the change is also made in the Student Information System (SIS) the change will be overwritten during the nightly SIS refresh.

**IEP Coordinator:** If the Case Worker field on the School Tab of the Student Personal Screen is filled, the name will feed forward into the IEP Coordinator field. This field may be changed here for the purpose of writing the IEP.

**Limited English Proficiency:** Feeds forward from the Student Personal Screen. This field may be changed here for the purpose of writing the IEP only. Unless the change is also made in the Student Information System (SIS) the change will be overwritten during the nightly SIS refresh.

**Verify Button:** The Verify process reviews requirements for the Service Plan. It verifies that all data required for setting a service plan to a status of ‘Current’ has been entered. It reviews data not only required on the Service Plan screen but also on the Evaluation/Review screens.

**GO Button:** This button redirects you to the Evaluation/Review that this Service Plan is attached to.

**Eligibility** is also documented on the detail tab. This information is not entered or changed on this screen; rather it is brought forward from the Evaluation/Review screen. As stated earlier, there is a 1-1 correspondence between the Evaluation/Review and the Service Plan. There may only be one Service Plan for each Evaluation/Review.
Service Plan Screen- Placement & Services Tab

The Placement and Services tab contains information from the IEP related to Special Education and Related Services, Supplementary Aids and Services, and Supports for School Personnel. This screen also reflects the percent of time the student spends in General Education and Special Education. These percentages are used to help determine LRE (Least Restrictive Environment) and for state reporting.

To see the Placement and Services data, click on the Placement and Services tab at the top of the Service Plan screen.

Figure 4-9: Service Plan Screen-Placement & Services Tab
Service Plan-Attachment Tab

The attachment tab of the Service Plan holds the final versions of all generated documents as well as any district attached documents that relate to the Service Plan. Examples of documents attached here would be:

- IEP
- Progress Reports (once the Service Plan has been made Current)
- Transportation Form
- Placement Checklists
- Transition Forms

Figure 4-10: Service Plan Screen-Attachment Tab

To see the Attachments data, click on the Attachment tab at the top of the Service Plan screen. To open one of the documents found on this screen, click the icon to the left of the document. Documents created by CLARITY will open as a “read only” Adobe® .pdf file.
Chapter 5: Maintaining SPED Data

One of the requirements for students receiving Special Education services is the reporting of progress to parents on goals and objectives at least as often as progress is reported for regular education students. CLARITY Process Management System offers Progress Reporting capabilities to meet this requirement.

Before entering Progress Report information, the student must have an IEP with goals and objectives in CLARITY and a CURRENT Service Plan. (For more information on CURRENT Service Plans, see the Chapter 4: “Understanding the Service Plan” in this section.) Once the student has met these requirements, CLARITY takes the goals and objectives found in the IEP and transfers them to the Progress Report document. This transfer of information means the user is not required to reenter the goal and objective information into the Progress Report. It also ensures that goals and objectives entered into the IEP are addressed on the Progress Report.

Like the IEP, the Progress Report document is attached to the student’s Service Plan. Unlike the IEP document, every Progress Report may be attached by saving it with a new name, allowing the user to keep a copy of each Progress Report sent home.

This chapter contains the following topics:
- Steps for completing the Progress Report
- Printing the Progress Report
- Opening a Progress Report document from within CLARITY
- Maintaining Progress Report History

Steps for completing the Progress Report

Before entering Progress information the student must have the following: 1) a CURRENT Service Plan in CLARITY, 2) a FINAL IEP document with goals and objectives attached to the Service Plan.

To enter data into a Progress Report within CLARITY:

1. Locate the Sidebar menu that contains **Modify a Progress Report**. Click the down arrow next to the Sidebar menu to open the menu, and then click **Modify a Progress Report**.
2. Use the Find feature to find the child whose Progress Report you would like to open. 
(For more information on finding students see Chapter 4: “Finding a Student Record” in 
Section 3 of this guide.)

3. The Progress Reporting screen will appear. The screen is divided into 2 areas, Goal 
Progress and Objective Progress.

4. Enter the progress on the goal (see figure above) using the drop down box next to the 
period of progress being reported on.

5. Enter the progress on each objective using the drop down box next to the period of 
progress being reported on.

6. If there is more than one goal for the student, follow steps 4 and 5 above for each goal 
page.

**NOTE:** If the same Progress Report Periods apply to all goals, you may use the “Apply To All” 
button found under the “Goal Progress” section of the screen. Upon SAVE the Goal Periods will 
update Objective Periods.
Figure 5-3: Apply To All button

**NOTE:** The date completed on the Progress Report is used to denote when the Goal and/or Objective was completed, **NOT** the date the service provider completes the Progress Report. If a Goal or Objective is marked **complete** on the Progress Report it will not be carried forward into the next IEP Questionnaire.

7. When you are finished entering the Progress Reporting data, click **SAVE** at the top of the screen to save your information.

**NOTE:** If you attempt to move off the Progress Reporting screen without saving, CLARITY will provide a warning reminding you that leaving the screen will result in loss of the information you just entered.

---

**Printing the Progress Report**

To print the Progress Report:

1. Locate the Sidebar menu that contains the Progress Report document icon. Click the down arrow next to the Sidebar menu to open the menu, and then click **Progress Report Document**.

2. The document submission screen will appear.
3. If you are ready to generate the final document, click the FINAL VERSION box. (If the Final Version box is not checked, a DRAFT version of the Progress Report will be generated.) If you click FINAL VERSION, you can enter a description for the Progress Report in the description field. This will allow you to easily distinguish the various Progress Report copies you created for this child’s Service Plan. For example, you may enter the date the Progress Report went home or the month or quarter for the Progress Report.

4. Click Submit. The Progress Report will be generated as a “read only” Adobe® document.

Figure 5-6: Progress Report document

Opening a Progress Report Document from within CLARITY

Once a Progress Report has been submitted as a final document, it is attached to the Service Plan in the same way the IEP is attached. So like the IEP, it is not necessary to submit the Progress Report each time you want to review it.

To open a Progress Report document within CLARITY:

1. On the Service Plan menu, locate the Find a Service Plan item.

Figure 5-7: Service Plan Menu
2. Use the Find feature to find the child whose Progress Report you would like to open. (For more information on finding students see Chapter 4: “Finding a Student Record” in Section 3 of this guide.)

3. The Service Plan Screen will open. Click the Attachment tab. The Progress Report document will be listed on the Attachment tab.

   **Figure 5-8: Service Plan Screen**

4. Click the icon. The Adobe® document will open for reviewing or reprinting.

   **Figure 5-9: Attachment tab**

**Maintaining Progress Report History**

Since Progress Reports must be completed several times during the school year, the Progress Report document is flexible enough to allow progress to be entered throughout the year.

**To enter additional progress reporting periods into the Progress Report:**

1. Locate the Sidebar menu that contains **Modify a Progress Report**. Click the down arrow next to the Sidebar menu to open the menu, and then click **Modify a Progress Report**.

2. When the Progress Report screen opens, enter the progress for the appropriate progress reporting period. Progress for previous reporting periods will carry forward into this progress report.

3. When you have completed entering progress, click the SAVE icon at the top of the screen to save your information.
To print the cumulative Progress Report

1. Locate the Sidebar menu that contains the Progress Report document icon. Click the down arrow next to the Sidebar menu to open the menu, and then click

   ![Print a Progress Report]

   Figure 5-10: Service Plan Menu

   ![Figure 5-10: Service Plan Menu](image)

2. The document submission screen will appear

   Figure 5-11: Document Submission Screen

   ![Figure 5-11: Document Submission Screen](image)

3. If you are ready to generate the final document, click the FINAL VERSION box. (If the Final Version box is not checked, a DRAFT version of the Progress Report will be generated.)

4. Enter the description of the Progress Report in the description field. This will allow you to easily distinguish the various progress report copies you created for this child’s Service Plan.

5. Click ![Submit](image). Unlike the IEP document, if a Progress Report document already exists in CLARITY this action does not overwrite the existing document. Instead, it saves the new Progress Report as a separate document.

   Figure 5-11: Final Version of the Progress Report

   ![Figure 5-11: Final Version of the Progress Report](image)
Chapter 6: Reviews and Reevaluations

Once the student has been found eligible for Special Education and has current services in place through the Initial Referral process, implementation of these services occurs. Instruction toward the student’s goals and objectives is provided as well as support for general education, and progress reports are completed and sent home. The Special Education process continues for the student as required by the IEP.

The Initial Referral Evaluation/Review is not the only Evaluation/Review the student will have in CLARITY. By law, it is necessary to update the IEP once each year and determine continued eligibility for the student every three years. There may also be other meetings held to discuss changes in the student’s educational program during the course of the school year. In each of these cases, CLARITY has an Evaluation/Review process to manage the data collected in much the same way the Initial Referral process is managed. For each of these Evaluations/Reviews an associated Service Plan is created to store the updated services a student now receives.

In addition to the Initial Referral process CLARITY manages the following:

- Annual Reviews
- Reevaluations
- Intermediate Reviews

This chapter explains how to use each of these Evaluation/Review processes.

Annual Review Process

In CLARITY, the Annual Review is the process during which the student’s IEP is reviewed and updated as required by law. Since Annual Reviews are required no later than one year after the last Annual Review, CLARITY has the ability to automatically create the next Annual Review when the student was initially entered and determined eligible for services; the next Annual Review date was entered. CLARITY uses this date to automatically schedule the Annual Review process based on the timelines developed by your district. For example, the student below has an Annual Review Due date of 10/24/2006.

NOTE: If the Service Plan is set to Current and the Annual Review due Date has not been entered, the Annual Review Due Date will be set to one year after the IEP meeting date.

NOTE: Eligibility cannot be changed in the CLARITY Annual Review Process. Should a change in eligibility be needed during the Annual Review Process, the user will need to create either a Reevaluation Review or an Intermediate Review in order to have access to change the eligibility fields.
If the “Generation Days” devised by the district for the Annual Review process is set at 45 School Days, CLARITY will look at the 10/24/2006 due date and count back from this date 45 School Days. This is the day that CLARITY automatically creates the student’s Annual Review process. Once created, this review will appear under the Evaluations/Reviews with Unscheduled Activities heading on the Home Page. For more information see Section 3, Chapter 2: “Scheduled/Unscheduled Activities”. As the Evaluation/Review appears in the Scheduled/Unscheduled Activities area of the staff member’s Home Page, the activities for the review should be scheduled immediately so that staff members are notified of the review in a timely manner.

Reminder: The due date for the Annual Review tasks is determined by the Timeline Days set on the System Policy screen and not the Generation Days. For this reason, it is important that the designated staff member schedule Evaluation/Review activities as soon as possible.

There can only be one active Annual Review for the student at any given time.

Steps for completing an automatically generated Annual Review:

1. On the Home Page under Evaluations/Reviews with Unscheduled Activities, click on the student’s name to be redirected to the student’s Evaluation/Review screen.

Figure 6-2: Evaluations with Unscheduled Activities
2. On the Activities tab of the Annual Review screen, click ![Schedule Activities](image1).  

   **Figure 6-3: Activities tab**

3. If any activities are unassigned or if you wish to change the activity’s assignment, open the line item ![Assigned To](image2) to assign the correct staff member to the task/activity using the ![Assign](image3) icon.  

   **Figure 6-4: Unassigned Activity detail box**

4. Close the detail box using the ![Close](image4) icon.  

5. Click ![Save](image5) at the top of the screen.  

6. Complete all assigned tasks via the Home Page.  
   a. As the IEP questionnaire is started for the student, an In-Development Service Plan is created.  

   **REMEMBER:** When updating the Annual Review IEP, hours and assignment information are the only items that can be changed in a service carried forward from the previous IEP. If any other information on the service has changed, the “carried forward” service must be terminated and a new service entered.  

   **REMEMBER:** When entering services in the Annual Review IEP, you may only enter one service per content area and location. For example, you may only enter one Direct Instruction in the Resource Room in the content area of Math. You may enter another Direct Instruction in another area (Reading for example), or add an Indirect Instruction in Math, but you cannot duplicate a service by entering another Direct Instruction in Math in the Resource room unless the “Continued Service” box has been checked.  

7. Once the Annual Review meeting has been held and the IEP is complete, change the Service Plan status to Current.  
   a. From the appropriate Sidebar menu, click ![Modify a Service Plan](image6) icon. Choose the In-development Service Plan.  
   b. Verify that all required answers have been entered into the Service Plan by clicking the ![Verify](image7) button to the right of the **Status** field.
NOTE: It is important to verify often when entering missing data after verifying to ensure that all required data has been entered. Remember, once data is entered into a question, additional questions may be presented based on a particular answer being chosen.

c. Change the status of the Service Plan to Current.

Figure 6-5: Service Plan Status field

<table>
<thead>
<tr>
<th>Detail</th>
<th>Services</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin Date:</td>
<td>10/27/2006</td>
<td>$</td>
</tr>
<tr>
<td>End Date:</td>
<td>10/28/2006</td>
<td>$</td>
</tr>
<tr>
<td>*Type:</td>
<td>S - Standard</td>
<td>$</td>
</tr>
<tr>
<td>Status:</td>
<td>1 - In development</td>
<td>$</td>
</tr>
<tr>
<td>Case Manager:</td>
<td>Cook, Sheree [Sped Teacher (445)]</td>
<td>$</td>
</tr>
<tr>
<td>*Enrollment School:</td>
<td>Hurbutt Elementary School (002)</td>
<td>$</td>
</tr>
<tr>
<td>*Grade Used for IEP:</td>
<td>09 - Grade 9</td>
<td>$</td>
</tr>
</tbody>
</table>

d. If the student already has a Current Service Plan it will be changed to History.
e. Click $Save$ at the top of the screen.

8. Change the status of the Annual Review Evaluation

a. From the Service Plan screen, click the $Go$ button to the right of the Evaluation/Review field. You will be redirected to the Annual Review the Service Plan is attached to.
b. Change the Annual Review Status to Complete and enter the date the Annual Review process was completed.

Figure 6-6: Annual Review status field

<table>
<thead>
<tr>
<th>Detail</th>
<th>Activities</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Student:</td>
<td>Abby T. (5245)</td>
<td>$</td>
</tr>
<tr>
<td>*Due By Date:</td>
<td>10/25/2006</td>
<td>$</td>
</tr>
<tr>
<td>Status:</td>
<td>A - Active</td>
<td>$</td>
</tr>
<tr>
<td>Coordinator:</td>
<td>Cole, Scott [Int (325)]</td>
<td>$</td>
</tr>
</tbody>
</table>

c. Click $Save$ at the top of the screen.

Entering an Annual Review Manually

A user may also add an Annual Review Evaluation/Review manually. For example, the user may want to start the next Annual Review prior to CLARITY’s automatically scheduled Annual Review.

Steps for manually entering an Annual Review

1. Open the CLARITY Sidebar containing the $Add an Annual Review$ icon. Click the icon, the following screen will appear:
2. Enter the DUE BY DATE. This is the date that the Annual Review meeting must be held by.

3. On the Activities tab, click [Schedule Activities] to assign the correct staff member to the task/activity using the icon.

4. If any activities are unassigned or if you wish to change an activity’s assignment, open the line item icon to assign the correct staff member to the task/activity using the icon.

5. Close the detail box using the icon.

6. Click [Save] at the top of the screen.

7. Complete all assigned tasks via the Home Page.
   a. As the IEP questionnaire is begun for the student an In-Development Service Plan will be started.
REMEMBER: When updating the Annual Review IEP, hours and assignment information are the only items that can be changed in a service carried forward from the previous IEP. If any other information on the service has changed, the “carried forward” service must be terminated and a new service entered.

REMEMBER: When entering services in the Annual Review IEP, you may only enter one service per content area and location. For example, you may only enter one Direct Instruction in the Resource Room in the content area of Math. You may enter another Direct Instruction in another area (Reading for example), or add an Indirect Instruction in Math, but you cannot duplicate a service by entering another Direct Instruction in Math in the Resource room unless the “Continued Service” box has been checked.

8. After the Annual Review process is complete, change the Service Plan status to Current.
   a. From the appropriate Sidebar menu, click the Modify a Service Plan icon. Choose the “In-development” Service Plan.
   b. Change the status of the Service Plan to Current.

   **Figure 6-10: Service Plan status field**

<table>
<thead>
<tr>
<th>Service Plan status field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin Date: 10/27/2006</td>
</tr>
<tr>
<td>End Date: 10/31/2006</td>
</tr>
<tr>
<td>Type: S - Standard</td>
</tr>
<tr>
<td>Status: 1 - In-development</td>
</tr>
<tr>
<td>Case Manager: Cook, Sheree [Spec Teacher (4455)]</td>
</tr>
<tr>
<td>Enrollment School: Hurst Elementary School (002)</td>
</tr>
<tr>
<td>Grade Used for IEP: 09 - Grade 9</td>
</tr>
</tbody>
</table>

c. If the student already has a Current Service Plan it will be changed to History upon save.

d. Click Save at the top of the screen.

10. Change the status of the Annual Review Evaluation
   a. From the appropriate Sidebar menu, click the Go button to the right of the Evaluation/Review field. You will be redirected to the Annual Review the Service Plan is attached to.
   b. Change the Annual Review status to Complete and enter the date the Annual Review process was completed.

   **Figure 6-11: Annual Review status field**

<table>
<thead>
<tr>
<th>Annual Review status field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due By Date: 10/25/2006</td>
</tr>
<tr>
<td>Status: A - Active</td>
</tr>
<tr>
<td>Coordinator: Cole, Scott [test (345)]</td>
</tr>
</tbody>
</table>

c. Click Save at the top of the screen.

Reevaluation Reviews
In CLARITY, the Reevaluation Review process is where the student’s eligibility is reviewed and it is determined whether the student still meets eligibility requirements as required by law. Since Reevaluation Reviews are required no later than three years after the last determination of eligibility, CLARITY has the ability to automatically create the next Reevaluation Review. When the student was initially entered and determined eligible for services, the Next Reevaluation Review Due Date was entered. CLARITY uses this date to automatically schedule the Reevaluation Review based on the timelines developed by your district. For example, the student below has a Reevaluation Due date of 5/15/2009.

NOTE: If the Service Plan is set to Current and the Annual Review due Date has not been entered, the Annual Review Due Date will be set to one year after the IEP meeting date.

Figure 6-12: Next Reevaluation Due Date

If the “Generation Days” devised by the district for the Reevaluation Review process is set at 90 School Days, CLARITY will look at the 5/15/2009 due date and count back from this date 90 School Days. This is the day CLARITY automatically starts the student’s Reevaluation Review for the student. Once started, this review will appear under the Evaluations/Reviews with Unscheduled Activities heading on the Home Page. For more information see Section 3, Chapter 2: “Scheduled/Unscheduled Activities”. As the Evaluation/Review appears on the staff member’s Home Page, the activities for the review should be scheduled so that staff members are notified of the review.

There can only be one active Reevaluation Review for the student at any given time.
Steps for completing an automatically generated Reevaluation Review:

1. On the Home Page under Evaluations/Reviews with Unscheduled Activities, click the student’s name to be redirected to the student’s Evaluation/Review screen.

   Figure 6-13: Reevaluation Review with unscheduled Activities

<table>
<thead>
<tr>
<th>Student</th>
<th>Date</th>
<th>Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbasi, Elisa (3000)</td>
<td>5/1/4/2009</td>
<td>Reevaluation</td>
<td>Active</td>
</tr>
</tbody>
</table>


   Figure 6-14: Activities tab

3. If any activities are unassigned or if you wish to change an activity’s assignment, open the line item to assign the correct staff member to the task/activity using the icon.

   Figure 6-15: Unassigned Activity detail box

4. Close the detail box using the icon.

5. Click Save at the top of the screen.

6. Complete all assigned tasks via the Home Page.
   a. As the IEP questionnaire is started, an In-Development Service Plan is created.

   **REMEMBER:** When updating the Reevaluation Review; IEP, hours and assignment information are the only items that can be changed in a service carried forward from the previous IEP. If any other information on the service has changed, the “carried forward” service must be terminated and a new service entered.
REMEMBER: When entering services in the Reevaluation Review IEP, you may only enter one service per content area and location. For example, you may only enter one Direct Instruction in the Resource Room in the content area of Math. You may enter another Direct Instruction in another area (Reading for example), or add an Indirect Instruction in Math, but you cannot duplicate a service by entering another Direct Instruction in Math in the Resource room unless the “Continued Service” box has been checked.

7. Once the Reevaluation meeting has been held and the IEP is complete, change the Service Plan status to Current.
   a. From the appropriate Sidebar menu, click the \[ Modify a Service Plan \] icon. Choose the In-development Service Plan.
   b. Verify that all required data has been entered into the Service Plan by clicking the \[ Verify \] button to the right of the status field.
      1. Enter any missing info being sure to “Verify” the Service Plan before attempting to change the status to ensure all required data has been entered.
   c. Change the status of the Service Plan to **Current**

   ![Figure 6-16: Service Plan status field](image)

   d. If the student already has a Current Service Plan it will be changed to History
   e. Click \[ Save \] at the top of the screen.

8. Change the Reevaluation Review **Status** to **Complete**.
   a. From the Service Plan screen, click the \[ Go \] button to the right of the status field. You will be redirected to the Reevaluation Review the Service Plan is attached to.

   ![Figure 6-17: Reevaluation Review status field](image)

   b. Change the Reevaluation Review status on the Reevaluation Review screen to Complete and enter the date the Reevaluation Review process was completed.
   c. Click \[ Save \] at the top of the screen.
Entering a Reevaluation Review Manually

The user may also add a Reevaluation Review manually. For example, a user may want to start the next Reevaluation Review prior to CLARITY’s automatically scheduled next Reevaluation Review.

Steps for manually entering a Reevaluation Review

1. Open the CLARITY Sidebar containing the Add a Reevaluation icon. Click the icon. The following screen will appear:

   Figure 6-18: Blank Reevaluation Review screen

   1. Enter the DUE BY DATE. This is the date that the Reevaluation Review meeting must be held by.
   a. The Status field is automatically set to Active.
   b. The Coordinator is brought forward from the student’s last Evaluation/Review.
   c. Make changes to this information as needed.
2. Check any Areas of Further Concern for the student.
3. On the Activities tab, click Schedule Activities.
4. If any activities are unassigned or if you wish to change an activity’s assignment, open the line item to assign the correct staff member to the activity using the icon.
6. Close the detail box using the icon.
7. Click at the top of the screen.
8. Complete all assigned tasks via the Home Page.
   a. As the IEP questionnaire is started, an In-Development Service Plan is created.

**REMEMBER:** When updating the Reevaluation Review IEP, hours and assignment information are the only items that can be changed in a service carried forward from the previous IEP. If any other information on the service has changed, the “carried forward” service must be terminated and a new service entered.

**REMEMBER:** When entering services in the Reevaluation Review IEP, you may only enter one service per content area and location. For example, you may only enter one Direct Instruction in the Resource Room in the content area of Math. You may enter another Direct Instruction in another area (Reading for example), or add an Indirect Instruction in Math, but you cannot duplicate a service by entering another Direct Instruction in Math in the Resource room unless the “Continued Service” box has been checked.

9. Once the Reevaluation meeting has been held and the IEP is complete, change the Service Plan status to Current.
   a. From the appropriate Sidebar menu, click the Modify a Service Plan icon. Choose the In-development Service Plan.
   b. Verify that all required data has been entered into the Service Plan by clicking the button next to the status field.
   1. Enter any missing information being sure to “Verify” the Service Plan before attempting to change the status to ensure all required data has been entered.
   c. Change the status of the Service Plan to Current.

**Figure 6-20: Service Plan status field**
10. Change the Reevaluation Review **Status** to Complete.
   a. From the Service Plan screen, click the **Go** button to the right of the status field. You will be redirected to the Reevaluation Review the Service Plan is attached to.
   
   b. Change the Reevaluation Review status to Complete and enter the date the Reevaluation Review process was completed.

   ![Figure 6-21: Reevaluation Review status field](image)

   c. Click the **Save** icon at the top of the screen.

**Intermediate Review Process**

While the Initial Evaluation, Annual Review and Reevaluation processes manages the bulk of a student’s needs, there may be other instances in which the team needs to meet to discuss the student’s educational program. In CLARITY, these instances are handled as Intermediate Review processes. These processes may include meetings that do not fall into the Initial Evaluation process in which the student is initially determined eligible, the yearly Annual Review to update the IEP, or the Reevaluation in which the student’s eligibility is reviewed. Examples of an Intermediate Review are the Manifestation Determination process, the process to review or revise the student’s current IEP outside of the Annual Review process, the FBA/BIP process, or the transfer into district process.

With Intermediate Review processes as with all other Evaluation/Reviews a Service Plan is created when the IEP questionnaire is started. This allows CLARITY to historically track the student’s data gathered during the process.

**There may be more than one active Intermediate Review for the student at any given time, but, there may only be one In-Development Service Plan at any given time.** If you enter an Intermediate Review and there is already one in the system for the student the following message will appear:

![Figure 6-22: Intermediate Review already exists](image)

Once you click **[OK]**, a new Intermediate Review will be created. If you do not wish to add the newly created active Intermediate Review, press **[Back]**. While adding an additional active Intermediate Review is acceptable, there are results you need to be aware of when having multiple Intermediate Reviews.
• Since there can only be one In-Development Service Plan for a student at any given time, the user should determine early on which Evaluation/Review to associate to the Service Plan.
• Users will have 2 sets of activities on their Home Page, one for each Intermediate Review that was created.
• With 2 reviews happening simultaneously you may end up with fragmented data.

For example: The Case Manager initiates an Intermediate Review for the purpose of updating goals and objectives. Before the IEP questionnaire is started and the Service Plan created, the student goes into crisis and requires a Manifestation Determination which is entered into CLARITY by an Administrator. When the IEP questionnaire is started (regardless of who starts it), a Service Plan will be created. Since there are 2 active Evaluations/Reviews CLARITY will not know which Evaluation/Review to attach the Service Plan to and you will get a warning message like the one below.

**Figure 6-23: Service Plan cannot be started**

When the message appears, click **OK**. Then, using the **icon**, choose the review that you want the Service Plan attached to.

**Best Practice:** It is best practice to combine the 2 reviews into one if possible, selecting both purposes in the Reason for Review area of the Intermediate Review screen. This will ensure that activities for both reasons are generated and that data is not fragmented between the 2 reviews.
Steps for entering an Intermediate Review

1. Open the CLARITY Sidebar menu containing the icon. Click the icon. The following screen will appear:

   **Figure 6-24: Blank Intermediate Review screen**

   ![Blank Intermediate Review screen](image)

   - *Student:* Abbas, Elisa (12345)
   - Request Date: 10/24/06
   - Requested by: (none)
   - Status: A - Active
   - Coordinator: SPED Teacher (030)

   - Reason for Review:
     - 1. PT/OT Eval and Placement
     - 2. Reeval - testing needed
     - 3. Transfer - in state
     - 4. Transfer - out of state
     - 5. Addendum
     - 6. Diagnostic Placement

   - Parental Consent To Evaluate:
     - Status: (none)
     - Date:

   - Eligibility:
     - Determination: E - Eligible for services

   - Dates:
     - Release Of Records Sent:
     - Procedural Safeguards Sent:
     - Notice Of PPT Meeting:
     - PPT Meeting:
     - Consent for Placement:

2. Enter the Request Date. This is usually the date the Intermediate Review is entered into CLARITY.

3. The Status of the Evaluation/Review and the Case Manager are automatically filled.

4. On the Activities tab, click **Schedule Activities**

   **Figure 6-25: Activities Tab**

   ![Activities Tab](image)

5. If any activities are unassigned or if you wish to change an activity’s assignment, open the line item to assign the correct staff member to the activity using the icon.
6. Close the detail box using the icon.
7. Click Save at the top of the screen.
8. Complete all assignments via the Home Page.
9. As the IEP questionnaire begins an In-Development Service Plan is created.

**REMEMBER:** When updating the Intermediate Review IEP, hours and assignment information are the only items that can be changed in a service carried forward from the previous IEP. If any other information on the service has changed, the “carried forward” service must be terminated and a new service entered.

**REMEMBER:** When entering services in the Intermediate Review IEP, you may only enter one service per content area and location. For example, you may only enter one Direct Instruction in the Resource Room in the content area of Math. You may enter another Direct Instruction in another area (Reading for example), or add an Indirect Instruction in Math, but you cannot duplicate a service by entering another Direct Instruction in Math in the Resource room unless the “Continued Service” box has been checked.

10. After the Intermediate Review meeting has been held and the IEP is complete, change the Service Plan status to Current.
   a. From the appropriate Sidebar menu, click the Modify a Service Plan icon. Choose the In-Development Service Plan.
   b. Verify that all required data has been entered into the Service Plan by clicking the button next to the Status field.
   1. Enter any missing information being sure to “Verify” again before attempting to change the status to ensure all required data has been entered.
   c. Change the status of the Service Plan to Current.

**Figure 6-27: Service Plan Status field**

<table>
<thead>
<tr>
<th>private</th>
<th>Services</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin Date:</td>
<td>10/27/2005</td>
<td></td>
</tr>
<tr>
<td>End Date:</td>
<td>10/26/2005</td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td>1 - In-development</td>
<td></td>
</tr>
<tr>
<td>Case Manager:</td>
<td>Cook, Sherree [Sped Teacher (4455)]</td>
<td></td>
</tr>
<tr>
<td>Enrollment School:</td>
<td>Hurbutt Elementary School (002)</td>
<td></td>
</tr>
<tr>
<td>Grade Used for IEP:</td>
<td>09 - Grade 9</td>
<td></td>
</tr>
</tbody>
</table>

d. If the student already has a Current Service Plan it will be changed to History.
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e. Click the Save icon at the top of the screen.

11. Once the Service Plan status has been made Current, change the Intermediate Review status to Complete.
   a. From the Service Plan screen, click the Go button to the right of the Status field. You will be redirected to the Intermediate Review attached to the Service Plan.
   b. Change the Intermediate Review Status to Complete and enter the date the Intermediate Review process was completed.

   Figure 6-28: Intermediate Review status field

   c. Click Save at the top of the screen.
Chapter 7: Reporting on Student Data

One of CLARITY’s features is the ability to analyze the data gathered through the Special Education process. CLARITY provides the user with a wide range of pre-defined reports from Annual Reviews Due to Special Education and Related Service Analysis. With only a few clicks of the mouse, information can be pulled from student records and put into an easy to read printable report. For a list of Pre-defined reports, see Appendix C.

This chapter explains how to run pre-defined reports.

Steps for running pre-defined reports

1. From the Reports menu, click on the report you wish to run. A screen similar to the following will appear:

   **Figure 7-1: Pre-defined report screen**

2. Select the correct parameters for the report. In the screen above, School, IEP Coordinator, Service Plan Status, Service Plan Active Date and Exclude Exited Students are the parameters for the report. The parameters for each report will vary.

3. Click **View Report**.

4. The report will be viewable on the screen.

   **Figure 7-2: Pre-defined Report**

<table>
<thead>
<tr>
<th>Enrollment School: Test School (999)</th>
</tr>
</thead>
<tbody>
<tr>
<td>IEP Coordinator: (887) - SPED Teacher (03a)</td>
</tr>
<tr>
<td>Student Name</td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td>Jones, Nathan</td>
</tr>
</tbody>
</table>

   **Disability/Service Type** | **Special Ed Service/Related Service** | **Service Begin Date** | **Service End Date** | **Service Provider** |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>01-Counseling</td>
<td>09/13/2006</td>
<td>09/13/2007</td>
<td>Adragna, Courtney</td>
</tr>
<tr>
<td>02-Instructor-Counsel</td>
<td>09/13/2006</td>
<td>09/13/2007</td>
<td>Adragna, Courtney</td>
</tr>
</tbody>
</table>

5. To move through the report, use the left and right arrows above the name of the report. You may also change the percentage of the view.
Printing a pre-defined report

1. To print the report you must export it to the desired format from the Select a Format field. CLARITY reports may be exported to:
   a. HTML with Office Web Components
   b. Excel
   c. Web archive
   d. Acrobat (pdf) file
   e. Tiff file
   f. CSV (comma delimited)
   g. XML file with report data

   Figure 7-3: Report with Export Field

   Caseload Analysis Report
   Edited Students Excluded
   11/20/2006 10:00:19 PM
   Page 1 of 1
   Current Service Plans Active on 11/20/2006 for All IEP Coordinators/All Positions

   Enrollment School: Test School (999)
   IEP Coordinator: (997) - SPED Teacher (03a)

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Student ID</th>
<th>Birth Date</th>
<th>Grade</th>
<th>Service Plan Begin</th>
<th>Service Plan End</th>
<th>Service Plan Status</th>
<th>Primary Exceptionality</th>
<th>Least Restrictive Environment</th>
<th>Gen Ed Time</th>
<th>Service Time</th>
<th>Lif Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Johnson, Nathan L</td>
<td>1227</td>
<td>09/01/1997</td>
<td>11</td>
<td>03/12/2006</td>
<td>03/12/2007</td>
<td>Current</td>
<td>Speech and Language Impairment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DISABILITY/Service Type</td>
<td>Special Ed Service/Related Service</td>
<td>Service Begin Date</td>
<td>Service End Date</td>
<td>Service Provider</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>01-Counseling</td>
<td>09/13/2006</td>
<td>09/13/2007</td>
<td>Ainslie, Courtney</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>01-Instructor Direct</td>
<td>09/13/2006</td>
<td>09/13/2007</td>
<td>Ainslie, Courtney</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>02-Instructor Related Service</td>
<td>09/13/2006</td>
<td>09/13/2007</td>
<td>Ainslie, Courtney</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. In the Select a format field, choose the format you wish to export the report to. Acrobat (pdf) file is the recommended format.

3. Click the Export button. The report will open in Adobe® Acrobat.
Understanding the CLARITY Interface

This section describes the basic functions of the CLARITY interface. This section includes the following chapters:

- Getting Started in CLARITY
- The Home Page (Navigating the CLARITY Home Page)
- Enrolling a Student
- Finding a student (Using the search panel, filtering, sorting)
- Navigating the IEP questionnaire
- Terminating Special Education Services
- Exiting a Student who no longer qualifies
Chapter 1: Getting Started in CLARITY

This chapter contains the following topics
• Before you begin
• Starting CLARITY for the first time
• Starting CLARITY using the desktop icon

Before you begin

CLARITY is a web based application, which means it appears in your Web browser (such as Internet Explorer or Apple Safari) just like Yahoo or CNN.

Before you begin using CLARITY, ensure that the following conditions are met:
• You have a compatible Web Browser
• You have a web address to the CLARITY application
• You have and account and password
• You have Adobe® Acrobat Reader 6.0 or higher

Compatible web browser

The table below describes the web browser needed for the CLARITY application to run.

<table>
<thead>
<tr>
<th>Windows 98/ME/2000/XP</th>
<th>Mac Client Version 10.3.9</th>
<th>MAC Client Version 10.4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Internet Explorer 6.0</td>
<td>Apple Safari 1.3</td>
<td>Microsoft Internet Explorer 5.2 OR Apple Safari 2.0</td>
</tr>
</tbody>
</table>

CLARITY web address

You must have the application web address in order to access CLARITY. The web address will be in the following format: http://<servername.domain>.com/CLARITY. Your CLARITY Administrator will tell you what to use in place of <servername.domain>, as well as whether to use http or https in the above text.
Starting CLARITY for the first time

The first time you start CLARITY, you need to follow a few simple steps to browse to the application and download a shortcut file to your desktop.

To start CLARITY for the first time:
1. Double-click the Internet Explorer icon on your Windows desktop or select Internet Explorer from the Mac OS X Dock.

   ![Internet Explorer Icon]

   This opens a Web browser window and displays your default Home Page.

2. Select Open from the File menu. The Open dialog box appears.

   ![Open Dialog Box]

3. Type the following in the Open dialog box.

   http://<servername.domain>.com/CLARITY

   **NOTE:** Check with your CLARITY Administrator for what to use in the place of `<servername.domain>`, as well as whether or not to use http or https in the above text.

4. Click OK. The File Download dialog box appears:

   ![File Download Dialog Box]

   Some files can harm your computer. If the file information below looks suspicious, or you don’t fully trust the source, do not open or save the file.

   File name: clarity_demo.bat
   File type: Batch Application
   From: <IP address>
   User warning: This type of file could harm your computer if it contains malicious code.

   Would you like to open this file or save it to your computer?

   ![Open, Save, Cancel, More Info Buttons]
5. Click **Save**. The **Save As** dialog box appears:

![Save As dialog box](image)

**NOTE:** In the File Download dialog box shown above, the file name is *CLARITY_demo.hta*. The file name you see will be *CLARITY.hta*.

6. Click **Desktop**.

7. Click **Save** to save the file to your desktop. Saving this file to the desktop creates an icon, which can be used to quickly access the CLARITY™ application by double-clicking it.

8. Depending on your computer's configuration, the **Download Complete** dialog box may close automatically. If it doesn’t, click **Close**.

**NOTE:** For Apple Macintosh clients, change the CLARITY.hta file name to CLARITY.htm before clicking 'Save'.

---

**Starting CLARITY using the Desktop Icon**

Once a user has a CLARITY icon on the Windows desktop, he or she can follow a simple procedure to start the CLARITY application.

**To start CLARITY with the desktop icon:**

1. Double-click the CLARITY icon on your windows desktop. The CLARITY login dialog box appears.
2. Type your **User ID** and **Password** in the CLARITY login dialog box. (Your CLARITY administrator provides this information to you.)

3. You should view CLARITY in a **maximized** window. To do this, click the **Maximize** button on the title bar.

**NOTE:** Passwords are **case sensitive**. Be sure to check the caps lock button if you have problems logging in.

**NOTE:** Before starting CLARITY, be sure all pop-up blockers have been turned off, or CLARITY’s web address cleared in the pop-up blocker. Pop-up blockers may interfere with system navigation.
Chapter 2: Navigating the CLARITY Home Page

This chapter contains the following topics:
- Components of the Home Page
- Home Page Icons
- The Sidebar
- Activities
- Scheduled/Unscheduled Activities
- Announcements

Components of the CLARITY Home Page

Figure 2-1 shows the components of a typical CLARITY™ Home Page. Each Home Page may look different than the one shown because the CLARITY™ administrator may have modified it.

Figure 2-1: Typical CLARITY Home Page
Home Page Icons

The following table provides information on several useful ways to navigate the CLARITY Home Page.

Table 2-2: CLARITY Home Page navigation features

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Home" /></td>
<td>Always brings user back to CLARITY Home Page.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>Resets or Refreshes the screen. If changes have been made on the screen but not saved, clicking Refresh ignores the changes and returns the screen to its setup prior to changes.</td>
</tr>
<tr>
<td><img src="image" alt="Print" /></td>
<td>Prints the current window.</td>
</tr>
<tr>
<td><img src="image" alt="Logout" /></td>
<td>Exits the CLARITY application. <strong>NOTE:</strong> After a certain amount of inactivity, as defined by the administrator, the user session will time out. By default, this interval is 20 minutes; however, the administrator can change this as appropriate. This helps prevent unauthorized access to information stored in the system. To reenter CLARITY, you must type the User ID and Password again.</td>
</tr>
</tbody>
</table>

The Sidebar

The Sidebar is a list of menus containing all of the actions one can perform in CLARITY. Your CLARITY Administrator determines the menus shown on the Sidebar, as well as the contents of each menu. In addition, the menus that appear and the contents of each menu vary depending on the user’s security level.

Figure 2-3: CLARITY Sidebar

- Collapse the entire Sidebar by clicking the double arrow next to the CLARITY name.
- Open individual menus by clicking the down arrows next to each menu name.
Student Menu

The CLARITY Student Sidebar menu contains options that let the user work with a student’s personal information. This includes looking for a student’s record and verifying personal information such as an address or phone number.

Figure 2-4 shows the options available on the Student Sidebar menu.

NOTE: The sample CLARITY screens shown in this guide may look different than the screens that actually appear on a given sidebar. In addition, procedures in this guide may reference CLARITY menus that are different than a particular user’s. This is because your CLARITY Administrator likely modified the system to meet the school’s or district’s needs.

The sample screens and procedures are intended to convey conceptual information. The specific steps will vary, depending on the CLARITY system configuration.

Table 2-4: Student Sidebar

<table>
<thead>
<tr>
<th>Student</th>
<th>Find a Student</th>
<th>Add a Student</th>
<th>Modify a Student</th>
<th>Delete a Student</th>
<th>Find a Guardian</th>
<th>Add a Guardian</th>
<th>Modify a Guardian</th>
<th>Delete a Guardian</th>
</tr>
</thead>
</table>

IMPORTANT: Some student information originates from the Student Information System (SIS) such as SASIxp. It is important to note that any changes made to certain student demographic information in CLARITY it will be overwritten the next time data is transferred from the SIS. Therefore, the district must make student demographic changes in the SIS and not in CLARITY.

Components of the Student Record

The figure below shows a sample student’s demographic information in CLARITY.

Figure 2-5: Sample Student Record

<table>
<thead>
<tr>
<th>Personal</th>
<th>School</th>
<th>Emergency</th>
<th>Medical</th>
<th>Guardian</th>
<th>Eligibility</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Student ID:</td>
<td>0000</td>
<td>00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Student ID:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Name:</td>
<td>Elias</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle Name:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td>Abbasi</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Security #:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Gender:</td>
<td>M - Female</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Ethnicity:</td>
<td>00 - White - Not of Hispanic Origin</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Birth Date:</td>
<td>04/17/1990</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type:</td>
<td>(none)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td>A - Active</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary</td>
<td>001 - English</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home</td>
<td>100 - Italian</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limited English Proficiency:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>English As Second Language:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1021 Lynwood Dr #2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td>Pleasantville</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State:</td>
<td>CA - California</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zip Code:</td>
<td>92653</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone Number:</td>
<td>760-555-2764</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The tabs on the student record screen contain information about the student: Personal, School, Emergency, and Medical.

The **Personal** tab shown above contains student demographic information. This information can be pulled from the Student Information System or entered manually. Fields with a * are required fields and must be entered to save the screen. For more information on entering student data see Section 2, Chapter 3: “Entering a Student Record into CLARITY”.

The **School** tab contains information on the student’s schools of attendance and residence, grade, and Graduation Option.

![Figure 2-6: Sample School Tab](image)

The **Emergency** tab contains emergency contact information for the student. If this information is contained in the SIS it will be pulled into CLARITY when the student is enrolled.

The **Medical** tab can be used to track Medicaid and physician information pertinent to the student.

![Figure 2-7: Sample Medical Tab](image)

The **Guardian** tab lists the student’s official guardians, whether they are the birth parents or otherwise. Guardian information on this screen may be added to or deleted from the record as appropriate.

![Figure 2-8: Sample Guardians tab](image)
The **Eligibility** tab contains a history of the student’s eligibility by Evaluation/Review. It includes the date of eligibility as well as the eligibility rank (Primary or Secondary) and Case Manager at for the Evaluation/Review. Eligibility information on this screen is “read only”. Eligibility information is entered through the Evaluation/Review screen and “copied forward” to this tab.

**Figure 2-9: Sample Eligibility tab**

<table>
<thead>
<tr>
<th>Evaluation Date</th>
<th>Type</th>
<th>Status</th>
<th>Case Manager</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/1/2006</td>
<td>Initial</td>
<td>Active</td>
<td>Morrow, Paige (Teacher 101-001)</td>
<td></td>
</tr>
<tr>
<td>Rank</td>
<td>Disability</td>
<td>OS - Specific Learning Disabled</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>F1 - Primary</td>
<td></td>
<td>8/16/2006</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The **Attachments** tab provides a location for attaching any document associated with a student, such as scanned pictures, legal documents psychological reviews or medical reports. Attachments may be added in several locations throughout the student’s record.

**Figure 2-10: Sample Attachments tab**

<table>
<thead>
<tr>
<th>Attachment</th>
<th>Source</th>
<th>Attached Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Member(s) Excused from Attending IEP Team Mee</td>
<td>DocGen - Document Generation</td>
<td>9/14/2006</td>
</tr>
</tbody>
</table>

**Evaluations and Reviews Menu**

The CLARITY™ Evaluations & Reviews menu contains options that let the user work with the various Special Education processes. This includes creating Evaluations/Reviews to track each meeting held for the student as well as providing an area to maintain important dates and eligibility information.

Figure 2-11 shows the options available on the Evaluations and Reviews Sidebar.

**Figure 2-11: Evaluations and Reviews Sidebar**
Service Plan Menu

The CLARITY Service Plan menu contains options that let the user work with student’s placement and services. This includes Special Education and Related Services, LRE, Student Assessments and Transition.

Figure 2-12 shows the options available on the Service Plan Sidebar.

![Service Plan Sidebar](image)

Staff Menu

The CLARITY Staff menu contains options that let users work with staff and position information. This includes adding staff members and reassigning positions.

Figure 2-13 shows the options available on the Staff Sidebar.

![Staff Sidebar](image)
Activities

The CLARITY Home Page Activities area lists activities assigned to the logged-in user. Activities are arranged in Past Due (red circle), Due (yellow triangle), and Future Due (green square) categories.

Figure 2-14: Activities Area of the CLARITY Home Page

<table>
<thead>
<tr>
<th>Past Due Activities (4)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong></td>
</tr>
<tr>
<td>4/8/2006</td>
</tr>
<tr>
<td>7/31/2006</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activities Due (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong></td>
</tr>
<tr>
<td>3/2/2006</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Future Due Activities (9)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong></td>
</tr>
<tr>
<td>9/9/2006</td>
</tr>
<tr>
<td>9/9/2006</td>
</tr>
<tr>
<td>9/9/2006</td>
</tr>
<tr>
<td>9/9/2006</td>
</tr>
<tr>
<td>9/9/2006</td>
</tr>
</tbody>
</table>

The school district’s business processes and timelines were defined and activities have been defined via CLARITY’s Activity Templates feature. As the district enters a student’s Evaluation/Referral, these templates help assign activities and their associated timelines.

When the user completes a Home Page activity, he or she must enter the date the activity was finished in the Date Completed field. After clicking the Complete button, the activity drops off of the Home Page.

For more information on activities, see Section 1, Chapter 2: “Completing Initial Referral Activities from the Home Page”.

Scheduled/Unscheduled Activities

Once the Evaluation/Review is entered, tasks/activities need to be scheduled. As stated earlier, CLARITY has the ability to schedule the tasks/activities required to complete the Evaluation/Review and notify the staff members of their tasks via the Home Page.

The Evaluations/Reviews with Unscheduled Activities and Evaluations/Reviews with Unscheduled Activities sections of the Home Page provide users with a list of
Evaluations/Reviews that are currently active (or in process). The list is broken down into Evaluations/Reviews that have not had the activities scheduled and those that have had the activities scheduled.

**Figure 2-14: Evaluations/Reviews with Scheduled or Unscheduled Activities**

<table>
<thead>
<tr>
<th>Evaluations / Reviews with Unscheduled Activities (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student</strong></td>
</tr>
<tr>
<td>Abbasi, Elisa (C0090)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Evaluations / Reviews with Scheduled Activities (5)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student</strong></td>
</tr>
<tr>
<td>Abbasi, Elisa (C0090)</td>
</tr>
<tr>
<td>Abbasi, Elisa (C0090)</td>
</tr>
<tr>
<td>Abbasi, Elisa (C0090)</td>
</tr>
</tbody>
</table>

**Evaluations/Reviews with Unscheduled Activities**

Depending on the amount of data at hand when the Evaluation/Review is entered as well as the responsibilities of the staff member entering the Evaluation, it may not be possible to assign activities at the time the record is created. For these students, the Evaluation/Review will appear in the Evaluations/Reviews with Unscheduled Activities section of the Home Page.

**Figure 2-15: Unscheduled Activities**

<table>
<thead>
<tr>
<th>Evaluations / Reviews with Unscheduled Activities (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student</strong></td>
</tr>
<tr>
<td>Abbasi, Elisa (C0090)</td>
</tr>
</tbody>
</table>

When you are ready to schedule the Evaluation/Review activities, click on the student’s name and you will be redirected to the Evaluation/Review screen where you can schedule the activities. For more information on scheduling activities see Section 2, Chapter 2: “Scheduling Activities in CLARITY”.

Once activities have been scheduled the student’s name will move to the Evaluations/Reviews with Scheduled Activities section of the Home Page.

**NOTE:** Annual Reviews and Reevaluations that are automatically created by CLARITY will also appear in these sections of the Home Page. It is extremely important that the Case Manager schedule the activities in a timely manner since the scheduling of activities determines when staff members are notified of the tasks to be completed. Since each Evaluation/Review has a defined timeline, failure to schedule the activities in a timely manner may result in not meeting due dates.

**Evaluations/Reviews with Scheduled Activities**

Evaluations/Reviews that have activities scheduled will appear in this section. This is to alert the Case Manager that a student on their caseload has an active Evaluation/Review.

**Figure 2-16: Scheduled Activities**

<table>
<thead>
<tr>
<th>Evaluations / Reviews with Scheduled Activities (5)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student</strong></td>
</tr>
<tr>
<td>Abbasi, Elisa (C2203)</td>
</tr>
<tr>
<td>Balboa, Amy (C2176)</td>
</tr>
<tr>
<td>Abbasi, Elisa (C0090)</td>
</tr>
<tr>
<td>Abbasi, Elisa (C2203)</td>
</tr>
</tbody>
</table>

80
Clicking on the student’s name will redirect you to the Evaluation/Review screen. Once the Evaluation/Review is complete and the status of the Evaluation/Review is changed, the Evaluation/Review will drop off of the Home Page. For more information on completing Evaluations/Reviews see Section 1, Chapter 2: “Completing the Initial Referral”.

Announcements

District office personnel can use the Home Page’s Announcements area to post important messages to users. Staff members should watch this area for notices, such as meeting announcements or changes in policies and procedures.

Figure 2-17: Announcements area of the CLARITY Home Page

Announcements

<table>
<thead>
<tr>
<th>Year End Preparation</th>
</tr>
</thead>
<tbody>
<tr>
<td>As we approach the end of this current school year, we need to have all IEP’s reviewed and signed on time. Please do everything you can to complete your activities on time.</td>
</tr>
</tbody>
</table>

Notice

This information is created in the ANNOUNCEMENT lookup table. Districts may use this area to pass an information to staff on staff meetings, record staff members of changes in policies/procedures, or send special messages such as Congratulations to a staff member, etc. The table is secured controlled.
This chapter provides a step by step explanation of how to enter a student into CLARITY.

This chapter contains the following topics:

- Entering a Student from the Student Information System (SIS)
- Entering Students Manually
- Changing Student IDs
- Adding Guardian Information

Before any Special Education information can be entered into CLARITY, the student record must first exist. By entering the student, you are able to track student demographic information as well as Special Education information.

There are 2 methods for entering student data: 1) importing information from the district student information system (SIS) or 2) manually entering student information.

**Entering a Student from the Student Information System (SIS)**

The most efficient method of enrolling a student is to import demographic information from the SIS. This method takes the burden of entering and updating demographic data off the Special Educator and instead relies on the district’s SIS.

**NOTE:** The amount of information imported from the SIS depends on the data entered at the school level.

It is important to remember that by using this method for entering and maintaining student demographic data, the data is owned by the SIS, not CLARITY. This means that permanent changes to student demographic data must be made in the SIS. Any changes made to SIS data through CLARITY will be overwritten when the CLARITY/SIS refresh is run. This includes fields that are empty in the SIS. Information entered into a field in CLARITY that the SIS contains a blank value is overwritten with a blank value during the refresh.

**Steps for entering a student from the SIS:**

1. On the Student Sidebar menu, click **Add a Student**
2. A blank Student Personal Information screen will appear
3. To the right of the **Student ID** field, click the [Copy from SIS](#) button.

4. For users with access to students at more than one school, a list of accessible schools will appear. Click the name of the school where the student is currently enrolled. **NOTE:** For users with access to only one school, this step will be skipped.

   ![Figure 3-2: SIS School List](#)

5. A list of students currently enrolled in the district’s SIS at the school will appear.

   ![Figure 3-3: SIS Student List](#)

6. Find the student you wish to enroll in CLARITY and click on the student’s name. You may use the FILTER and SORT features to find your student. For more information on finding and sorting students, see the topic titled “Using the Find a Student Function” in this chapter. **NOTE:** Student names appearing in GRAY font are students that have already been entered into CLARITY. If the student you are trying to enroll is in gray font, you **do not** need to reenter the student. Instead, use the Student sidebar menu to FIND A STUDENT.

7. Demographic information available in the SIS will be imported into CLARITY.
Figure 3-4: Student Personal Information from SIS

<table>
<thead>
<tr>
<th>Personal</th>
<th>School</th>
<th>Emergency</th>
<th>Medical</th>
<th>Guardians</th>
<th>Eligibility</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Student ID:</td>
<td>3000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Student ID:</td>
<td>3000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*First Name:</td>
<td>Elsa</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle Name:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Last Name:</td>
<td>Abbasi</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Security #:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Gender:</td>
<td>F - female</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Ethnicity:</td>
<td>(none)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Birth Date:</td>
<td>4/17/1995</td>
<td>(21 years &amp; 4 months)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type:</td>
<td>(none)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td>A - Active</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary:</td>
<td>(none)</td>
<td>Limited English Proficiency:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home:</td>
<td>(none)</td>
<td>English 6th Second Language:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td>1021 Lynnwood Dr #2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td>Pleasantville</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State:</td>
<td>CA - California</td>
<td>Zip Code:</td>
<td>92693</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone Number</td>
<td>714-555-2764</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

REMEMBER: The information imported from your SIS belongs to the SIS. Any changes made to this information through CLARITY will be overwritten during the nightly refresh of SIS data.

8. Check each of the tabs and enter any missing information. All items must be completed before the screen can be saved.

9. **Student Personal** tab contains student demographic information as well as information on the student’s status in CLARITY.
   a. **Student ID** – The student ID is a unique number generated by the SIS.
   b. **Type** – Enter the type of student this will be. Examples may be Special Education, Pre-school, 504 and gifted. Choices in this dropdown are controlled by the district.
   c. **Status** – This refers to the student’s status in CLARITY. Since the student is presently being entered into the application, this field defaults to **Active**.

**NOTE:** If a student no longer qualifies for Special Education, the status for the student should remain **ACTIVE** until the student’s record is no longer needed for state reporting. Only then should you change the status to inactive.

d. **SIS Status** – This field defaults to A (for Active) since this student’s information was imported from the SIS. This field will never be changed unless the student withdraws from your district’s schools but is still receiving services. Once the student is withdrawn from the SIS, you should change the SIS status to **Inactive**.

**NOTE:** A student can be active in CLARITY in the **Status** field and be inactive in the SIS **Status** field. Students that attend private schools would be an example. Also, a student may be inactive in CLARITY and active in the SIS. A student who no longer qualifies for Special Education services but who is still enrolled in the district would be an example.

e. **Student Exit** – These fields remain blank until the student has exited Special Education. For more information on exiting a student from CLARITY, see “Terminating Special Education Services; Exiting, Inactivating and Deleting Student Records” in Chapter 6 of this section.

10. The **School** tab contains information regarding the student’s home and attendance school, grade and graduation information.
a. **School of Residence** – The school the student would attend if no Special Education Services were required.

b. **School of Attendance** – The school the student is currently enrolled in and attending on a daily basis.

c. **Additional fields** – Additional fields appearing on the tab will by state. Contact your CLARITY Administrator for further information regarding the required fields and the data to enter in them.

11. The **Emergency** tab provides an area to enter contact information in the instance of a child’s emergency. If this information is entered into the SIS, it will be imported into CLARITY.
12. The Medical tab can be used to track Medicaid numbers and physician information. If this information is entered into the SIS, it will be imported into CLARITY.

Figure 3-7: Medical tab

13. The Guardian tab lists the student’s official guardians whether they are the birth parents or another guardian. Guardian information on this screen may be added or deleted as appropriate. For more information on adding additional Guardians, see “Adding Guardian Information” in this chapter.

a. To view Guardian information, open the Guardian line item by using the icon.

b. To add additional Guardians not imported from the SIS, see “Adding Guardian Information” in this chapter.

Figure 3-8: Guardian tab

14. The Eligibility tab contains a history of the student’s eligibility organized by each Evaluation/Review. It includes the date of eligibility as well as the eligibility rank and Case Manager at the time of the Evaluation/Review. This tab will be blank when first entering a student into CLARITY.

a. Eligibility information may not be entered through this screen. Eligibility information must be entered into the Evaluation/Review screen, and it will then be automatically transferred to this screen.
15. The **Attachment** tab provides a location for attaching any document associated with a student such as scanned pictures, legal documents, psychological reports or medical reports.

   a. Attachments may be added in several locations throughout the application. It is important that you add attachments to the correct location. See your CLARITY Administrator for further instructions regarding the various options.

   b. To attach a document to the Attachment tab, see the heading “Attaching Outside Documents to the Student Record” in Chapter 7 of this section.

16. Click the **Save** icon at the top of the screen to save the student and all demographic information into CLARITY.

   **IMPORTANT:** Check with your CLARITY Administrator to determine the exact fields that must be completed on each tab.

---

### Entering Students Manually

There may be an occasion when the student you need to enter into CLARITY will not be maintained in the SIS. This may be the case for Pre-school students, students served at private schools or students attending a non-district school. For these students you need to manually enter all demographic data. Student entered manually will need to continue having their demographic data updated manually. They are not included in the nightly SIS refresh until their Student ID matches a value in the SIS.

**Steps for entering a student manually:**

1. On the Student sidebar menu click **Add a Student**

2. A blank Student Personal Information screen will appear:
3. Beginning at the top of the screen, complete all required fields on the Detail, School, Guardian, Emergency and Medical tabs. Check with your CLARITY Administrator for a list of any additional fields they require.

4. On the Personal tab, it is important that the SIS Status checkbox remain blank to denote that the student is not enrolled in the SIS.

5. On the School tab, the Case Manager should be filled in if the district is defining the Case Manager through this field. Check with your CLARITY Administrator to see if should complete this field. For more information on defining Responsibility Areas, see the configuration document titled, “Lookup Tables”.

6. Enter all Guardians on the Guardian tab. For more information on adding Guardians, see the heading titled “Adding Guardian Information” in this chapter.

7. Click the icon at the top of the screen to save the student demographic information.

**NOTE:** Students who are entered manually must have a unique Student ID number. It is important that the district determine the process for creating these unique numbers for manually entered students, being sure that the numbers will not conflict with the string of student ID numbers used by the district’s SIS. ID numbers in CLARITY may be alphanumeric.

### Changing Student ID Numbers

There may come a time when students entered manually in CLARITY become enrolled in the district’s SIS. A Pre-school student served in a community day care that enrolls in the school district for first grade is an example. Should this happen, it is important that the student’s ID in CLARITY be changed to match the new SIS ID and the SIS status be changed to Active. Once changed, the SIS will recognize the student and begin updating demographic information on a nightly basis.

**To change a student’s ID:**

1. On the Student sidebar menu, click **Modify a Student**
2. Change the current ID to match the new SIS ID.
3. Click **Save** at the top of the screen.

Figure 3-13: Student ID

| *Student ID:* | 3000 |

**Best Practice Tip:** It is best practice to limit the number of users who are able to change student ID numbers. If an ID number is inadvertently entered incorrectly, the student’s demographic information will not be updated during the nightly refresh.

---

**Adding Guardian Information**

At times it may be necessary to enter additional guardians into CLARITY. This may happen if your SIS only enters one parent and the student has divorced parents, both of which must be included in making educational decisions for the student. It may also be necessary in the case of students in the care of Children’s Services or students requiring an educational surrogate.

You may enter guardian information in 2 ways:

1. By using the Add a Guardian function on the Student sidebar menu, or
2. Adding the guardian through the Guardian tab of the Student Personal screen.

**Adding Guardian Information through the Student Personal Screen**

The most efficient way to add a guardian for a student is at the time the student is entered into CLARITY. Entering a guardian at this step allows the user to skip several steps in the entry process.

1. On the Student Personal screen click the Guardian Tab.
2. Click the Add Item icon on the toolbar. The following screen will appear:

Figure 3-14: Add a Guardian Screen
3. Complete all required (●) and pertinent fields on the screen.
   a. Enter the **Relationship** of the student to the Guardian using the choices in the dropdown.
   b. Enter the **Begin Date** – the date this person became a Guardian for this student.
   c. **End Date** – Leave the End Date blank until this person is no longer a Guardian for the student.
   d. **Custody Status** – Use the dropdown to enter the custody status of the Guardian, for example Natural Parent, Court Appointed or No Custody.
   e. **Residing With Guardian** – If the student does not live with this Guardian, uncheck this box.
   f. **Placed By Name** – If this is a non-parent, who placed the student with this Guardian?
   g. **Include in Correspondence** – If checked, this reminds the Case Manager to include the Guardian on any Special Education correspondence that is sent home.
   h. **Maintained by SIS** – If this Guardian is found and will be maintained by the district’s SIS, leave this box checked. If this is a Guardian not found in the SIS and will not be entered into the SIS, uncheck this box.
   i. **Notes** – Available for the user to enter any notes on Custody or Residence.
   j. **Guardian** – If the Guardian already exists in CLARITY (already has a Special Education student in the district for example), use the search icon to find the Guardian. If the Guardian does not already exist in CLARITY, complete the fields in the Guardian section of the screen.

4. Close the detail box using the icon.
5. Click at the top of the screen.

**Adding Guardian Information through the Student Menu**

1. On the Student sidebar menu, click **Add a Guardian**. The following screen will appear:

   **Figure 3-15: Blank Guardian Screen**

   ![Blank Guardian Screen](image-url)
2. Enter the guardian information into the blank screen.
3. Click at the top of the screen. The Guardian information has been saved.
4. Click the Student tab at the top of the screen.
5. Click the add item icon on the toolbar at the top of the Student tab.
6. The following detail box will open:

   **Figure 3-16: Student Detail Box**

   ![Figure 3-16: Student Detail Box]

7. Using the search icon, find the student this guardian is associated to in the student list. For more information on how to use the “Find a Student” function of CLARITY, see “Using the Find a Student Function” in Chapter 4 of this section.
8. The student’s name will populate the student field.

   **Figure 3-17: Student Detail Box with Student Name**

   ![Figure 3-17: Student Detail Box with Student Name]

9. Enter the Guardian Relationship from the dropdown list.
10. Enter the date this person became the student’s guardian.
11. Leave the End Date field blank until this person is no longer the student’s guardian.
12. Enter the Custody Status for this guardian.
13. The Residing With Guardian box is automatically checked. If the student does not live with this guardian, uncheck the box.
14. If this guardian is to be included in all Special Education correspondence, leave the Include in Correspondence field checked.
15. If the Guardian information is or will be maintained in the SIS, check the Maintained By SIS checkbox. If this box is checked, the guardian information will be updated in the nightly CLARITY/SIS refresh.
NOTE: If the Maintained By SIS box is checked and the guardian information is not found in the SIS, the guardian information will be deleted upon the next nightly refresh.

Figure 3-18: Completed Student Detail Box

<table>
<thead>
<tr>
<th>Student</th>
<th>Relationship</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Custody Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbasi, Elsa (2000)</td>
<td>07 - Guardian</td>
<td>10/10/06</td>
<td></td>
<td>03 - No Custody</td>
</tr>
</tbody>
</table>

16. Close the detail box using the icon.
17. Click at the top of the screen.
18. If the Guardian has more than one student, you may repeat steps 6-15 above.
Chapter 4: Finding a Student Record

This chapter contains the following topics:

- Using the Find a Student function
- Using the Search Panel

Most of the functions in CLARITY focus on a single student. For example, when a user wants to create an Evaluation/Review or update student information, he or she must first specify the student they want to work with. To find a student, the user can use either of the following methods: 1) the “Find a Student” feature on the Student Sidebar, or 2) the search panel that appears at the top of many CLARITY screens.

Using the Find a Student Function

When the user chooses the “Find a Student” menu from the Student Sidebar, a list of students appears. If the list is long, the user can use the Previous or Next links at the bottom of the screen to navigate through the list. To select the student click on any item in that student’s row.

If the student list is exceptionally long, or if the student’s name you wish to find begins with the letter ‘P’ using the Next and Previous links is not efficient. Instead the sorting and filtering features should be used.

The Student list can also be filtered for active students only. To see a list of only Active students, click the active students only at the top of the screen.

Using the Filtering Feature in CLARITY

In many cases, CLARITY™ will display a long list of student names on a Student List screen. The user can filter student records to locate the student or group of students that match a specific criterion.

To filter, use the drop-down boxes at the top of the Student List screen.
To filter student records:

1. Click the down arrow next to the filter field to display the column headings filter options.

2. In the “look for” box, type the first few letters of the item you are searching for. For example, if you want to find a student whose last name is Smith, you may type ‘SMI’ to see a list of all students whose last name begins with SMI, to see only the student’s with the last name of Smith, type the entire last name.

3. Click (or use the ENTER key on your keyboard) to filter the records.

NOTE: If the student is not found in the student list, it may be because the student has been exited. Uncheck the button on the student list toolbar for a list of all students, active and inactive, in the CLARITY database.

Use the following guidelines when typing the filter criteria:

<table>
<thead>
<tr>
<th>Column heading</th>
<th>Type this in “look for” box</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The last name of the student the user wants to locate. Alternatively, you can type only one letter to filter all students whose last name begins with that letter. For example, to filter for students whose last name begins with S, type this: S</td>
</tr>
<tr>
<td>Column heading</td>
<td>Type this in “look for” box</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Student Id</td>
<td>The student ID of the student to locate. For example, to filter for a student whose ID is 89018, type this: 89018</td>
</tr>
<tr>
<td>State Student Id</td>
<td>The state student ID for the student to locate.</td>
</tr>
<tr>
<td>Birth Date</td>
<td>The birth date of the student the user wants to locate. This must be a valid date, such as 8/22/95 or 8/22/1995. For example, to filter all students whose birth date is 1/1/98, type this: 1/1/1998</td>
</tr>
<tr>
<td>Grade</td>
<td>The grade of the student the user wants to locate. For grades lower than 10, the user must include the leading zero. For example, to filter all students in the ninth grade, type this: 09</td>
</tr>
<tr>
<td>Enrollment School</td>
<td>The name of the enrollment school for the student the user wants to locate. The name must be typed exactly as it appears in the School table of CLARITY.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the student who the user wants to locate. This is typically either A for Active or I for Inactive.</td>
</tr>
</tbody>
</table>

### Using the Sorting Feature in CLARITY

The student list in CLARITY may also be sorted by the column headers found on the student list screen. To sort by one of the headers, simply click on the header name. This will rearrange the list to the order you have selected. For example, the normal student list is sorted by Name; the screenshot below shows a student list sorted by Birth date.

**Figure 4-4: Student list sorted by Birth Date**

![Student list sorted by Birth Date](image)

The first click on a Column Header sorts the list in Ascending order, the second click will re-sort in Descending order.
Using the Search Panel in CLARITY

Many CLARITY screens display a search panel at the top of the workspace. The user can use this search panel to locate a student.

**Figure 4-5: Search Panel**

To search for a student using the Search Panel:
1. Click on the search icon 🖥️ to display a list of names.
2. Follow the directions on “Using the Filter Feature of CLARITY” in this chapter.
Chapter 5: Navigating the IEP Questionnaire

This chapter contains the following topics:

- Questionnaire Icons
- Types of Questions in the IEP Questionnaire
- Entering Goals and Objectives
- Entering Special Education and Related Services
- Entering Assessment information

CLARITY uses the questionnaire concept for completing the IEP and other SPED documentation. Instead of simply displaying a form, the Questionnaire breaks the form down into a series of questions that it presents to the user to answer. The Questionnaire only presents questions appropriate to each student's needs, saving time and effort. For example, if a student needs ESY, the Questionnaire will present questions relevant to ESY. Otherwise it will bypass those questions.

As you move through the questionnaire, using the Previous, Next or End button will automatically save your answer. It is only necessary to use the Save icon if you are on a question for a long time and don’t want to loose your data. The Goals and Objectives, Present Levels of Performance and State and District Assessment questions are examples of questions on which you should use the Save feature periodically.

### Questionnaire Icons

Table 5-1 explains the navigation tools available on the IEP Questionnaire toolbar.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Saves your work.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>Resets or refreshes the screen. If changes have been made on the screen but not saved, clicking Refresh ignores the changes and returns the screen to its setup prior to changes.</td>
</tr>
<tr>
<td><img src="image" alt="Previous" /></td>
<td>Brings you to the previous screen in the IEP Questionnaire. (F7 is the keyboard shortcut for this command.)</td>
</tr>
<tr>
<td><img src="image" alt="Next" /></td>
<td>Brings you to the next screen in the IEP Questionnaire. (F8 is the keyboard shortcut for this command.)</td>
</tr>
<tr>
<td><img src="image" alt="End" /></td>
<td>Ends your session in the IEP Questionnaire. If you are ready to leave the questionnaire and move on to another student or screen, you must use this icon.</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>Validate</td>
<td>Checks to see if all required information has been entered into the IEP questionnaire. If not, a list of questions that still need to be answered is displayed. It also checks to see if the Service Plan can successfully be set to Current.</td>
</tr>
<tr>
<td>Preview</td>
<td>Generates a <strong>draft</strong> copy of the IEP in Portable Document Format (PDF) version of the IEP for your review.</td>
</tr>
<tr>
<td>Print</td>
<td>Prints the current window.</td>
</tr>
</tbody>
</table>

### Types of Questions in the IEP Questionnaire

As you work with the IEP Questionnaire, you will enter information in various ways. This section describes the types of questions on which you will enter data.

**Form field question**

This type of question presents a list of fields to be completed. Some fields provide drop-down boxes from which you can make a choice. Other fields have search panels associated with them. These fields are indicated with a Search icon 📚 to the right of the field. (See the First Name field in Figure 5-1.)

**Figure 5-1: Sample form question**

![Sample form question](image)

**NOTE:** In the guardian question above, changes made on this screen will NOT change the Guardian information in CLARITY. This is solely for the purpose of displaying the names as desired on the IEP document.
Text box question

Some IEP questions allow you to type large amounts of text in a text box, such as personal accounts, testimonials, or other descriptions. Text boxes always include a spell-checking tool. To use the spell check, click on the spell check icon at the bottom of the screen.

![Figure 5-2: Sample text box question](image)

NOTE: Pop-up blockers may prevent the spell check from working. If this happens, press the CONTROL <Ctrl> key on your keyboard at the same time you click the spell check icon. This will temporarily override the pop-up blocker. See your CLARITY Administrator to have the CLARITY web address cleared to prevent problems with the pop-up blocker.

Date question

Date questions provide a text field for entering the date. You may either type the date in the box, or use the to open a calendar on which you can choose the date.

![Figure 5-3: Sample Date question](image)

NOTE: When entering dates prior to 2000, you must enter all 4 digits in the year.

Check box question

Check box questions present a list of information with check boxes next to each item. To choose the item, click in the checkbox. You can often select more than one item from the list.

![Figure 5-4: Sample check box question](image)
Yes/No radio button screen

Some questions present Yes/No questions where you choose a radio button to indicate your response. Your answer determines what question appears next. For example Figure 5-5 contains a Yes/No radio button regarding the student’s transition plan. If you answer Yes, the Transition Plan screen shown in Figure 5-6 appears. If the Transition Services question is answered NO, the Transition Plan questions are skipped.

![Figure 5-5: Transition Plan Yes/No radio button question](image)

![Figure 5-6: Transition Plan screen](image)

Dropdown List question

This type of question provides the user with answer choices from which to choose in a drop down box. Click the ▼ next to the field to see the list of choices.

![Figure 5-7: Dropdown question.](image)

Table question

On this type of screen, items are presented in a table format, one item per line. The information presented can be modified or new items added to the table.

The Progress Report Periods in Figure 5-4 has four items in the table. Each one can be edited by selecting the Edit Item icon in the far-left column.

You can also add new lines to the table by selecting the Add item icon in the top left corner of the table. You may see the Add Item presented as an icon that looks like this, but it has the same purpose.
Combination question

The Combination question shown in Figure 5-9 presents a mixture of elements on one screen. This questionnaire screen contains text, dropdown and a simple table questions.

Figure 5-9: Sample combination screen
Entering Goals and Objectives

Defining goals

As you progress through the IEP Questionnaire, you will reach a point where you define annual goals and objectives for the student. Figure 5-10 illustrates a sample goals and objectives page of the IEP questionnaire. Your page may be different depending on your state requirements for goals and objectives.

REMEMBER: Depending on the length of time that has been set for the application to log you off for inactivity, this may be a screen that you want to save periodically. Remember, the application does not recognize activity on a particular screen (e.g., entering information into a field), it only recognizes activity as moving from screen to screen or using the Save feature as activity. Although you will receive a warning prior to the application logging you out, any information since the last save will be lost it you are timed out.

Figure 5-10: Goals and objectives page of IEP Questionnaire

The Annual Goals screen is divided into several sections. The following pages explain these sections.
Goal Area

The Goal Area for the Annual Goal is labeled “Goal 4 of 4” on the sample screen shown in Figure 5-10 above. Use this area to move from goal page to goal page for the student.

Figure 5-11: Goal area of the Questionnaire workspace

To move from one goal page to the next you may use the Next and Previous button under the “x of y” goal number. You may also use the “GO TO” box to the right of the “x of y” goal number. Clicking on the down arrow on the “GO TO” box will show you all of the Annual Goals for the student. Click on the goal page you wish to see and click Go.

When you are finished entering information for one goal, click New to add a new goal page. Multiple goal pages stack one upon the other just as paper copies would.

Use Delete to delete the active goal.

REMEMBER: Never delete a goal page that you did not write without first checking with the owner of the goal.

Goal Area section

The Goal Area section of the Annual Goal page is used to specify the area that the goal is to address. This is a checkbox field. You may choose more than one area for the goal to address if your district permits.

Figure 5-12: Goal Area section of Annual Goal tab

Measurable goals section

The Measurable goals section is labeled “Measurable Annual Goal.” Use this area to identify measurable annual goals. Goals may be entered in 2 ways: 1) Using the Goal Bank provided for you by your district, or 2) Typing in your own Annual Goal.

Using the Goal Bank to add Annual Goals

When using the goal bank to add Annual Goals, you must specify a Goal Code by typing the goal code or using the Search icon to search the list of acceptable codes. Your CLARITY administrator defines these codes.

To choose from the goal list, click the description of the goal and it will populate the text box. The code for the goal will be entered into the Goal Code field.

The Annual Goal chosen from the goal bank may be modified once it has been chosen. For example, if the goal chosen is “will improve Reading skills”, this goal may be modified to read
“Alisa will improve Reading skills from 6th to 7th grade level as measured by end of the book test by 6/1/2007.”

Manually entering Annual Goals

As a user you may decide to forgo the bank of Annual Goals and write your own. To manually enter the Annual Goal, simply click in the text box under the Goal Code field and type your text. Annual Goals entered manually will not have a goal code.

You may use the spell check provided under the text box to check your spelling.

**NOTE:** Goals entered manually into the goal page are **NOT** saved back into the goal bank. If you have a list of Annual Goals you would like added to the bank, see your CLARITY Administrator.

Objectives section

Most districts require that annual goals have short term benchmarks or objectives associated to them. If the district does not require the objectives the objectives fields on this screen will not be required and can be ignored by the user. If the district requires objectives, the user has a choice of taking the objectives from a bank of objectives found in the program or writing his or her original objectives.

Figure 5-15 shows an example of a goal with short term objectives.

**Figure 5-13: Identifying measurable annual goals**

To create the goal’s specific objectives, select the Add items icon in the far left column under the heading called Objectives. This displays the list of possible objectives, from which you choose those appropriate for this particular goal. A list of the entire objective bank may be printed by running the Objective List predefined report. For more information on running predefined reports, see Chapter 7: “Reporting on Student Data: in Section 2 of this guide.”
Because the list of objectives is extensive, using the filter feature on the toolbar will narrow your search. You may filter on Type, Code, or Description:

Filtering Objectives by Type

Filtering objectives by Type limits the objectives seen to those with the same Type Code. The type code is designated by the first 3 letters of the corresponding annual goal. In Figure 5-14 above, the Annual Goal is for Mathematics. The corresponding Objective type code is AMA. For a list of all CLARITY Objective type codes see Appendix B.

To Filter by Type:
1. Select TYPE from the filter field on the toolbar.
2. Enter the 3 letter Type (for example AMA for Mathematics) in the “look for” field.
3. Click \(\text{GO}\).
4. The list of all objectives in that type will be shown.

Figure 5-15: Objective list filtered by Type
Filtering Objectives by Code

Filtering by Code limits the objectives seen to those with a specific code. This is used if you know the specific objective from the bank you wish to use. For example, the Math objective you need is “develop problem-solving abilities”. Having used this objective before, you know the code for this specific objective is AMALE617. Instead of filtering for Math objectives and using NEXT to move page to page until you find the objective, you can filter on Code and type the objective’s code in the “Look for” field on the toolbar. The specific objective you need will be filtered out.

To filter by code:
1. Select CODE from the filter field on the toolbar.
2. Enter the specific objective code in the “look for” field.
3. Click Go.
4. The specific objective will appear on the screen.

Filtering Objectives by description

Filtering by Description allows the user to filter out any objectives with a key word in the description. This method will filter out all objectives that contain the specified word. This method is useful for finding objectives across academic categories. For example, if you are looking for objectives on working with decimals, using “decimal” as the key word will find any objective in any area that contains the word “decimal”.

To filter by description:
1. Select Description from the filter field on the toolbar.
2. Enter the key word (for example, decimal) in the text box, adding an asterisk (*) before and after the key word. The asterisk is a “wildcard” and filters the search by any phrase that has the word decimal somewhere within it. In the example of looking for objectives on working with graphs above, the keyword entered would be *decimal*.
3. Click Go.
4. All objectives containing the key word will be shown.
Progress Report Period section

Use the Progress Reports area of the goals and objectives screen to define progress reporting periods. You can define them as dates, month and year, or any meaningful text such as “1st Quarter”, “2nd Quarter”, etc.

Typically, you only need to enter progress report periods on the first goal. By clicking the Apply to All button at the bottom of the Progress Report Period box, the periods are automatically copied forward for each successive goal. You may change the copied forward dates should you have one goal with different dates for reporting progress.

Figure 5-18: Progress Report Period

Entering Special Education and Related Services

The Special Education Services and Related Services questions in the IEP questionnaire are Simple Table questions. The toolbar allows you to add items one row at a time to the list. The following steps describe how to add Special Education Services. Adding Related Services, Supplemental Aids and Services and Supports for School Personnel will follow the same process.

Figure 5-19: Special Education Services question

To add Special Education Services:

1. Click the Add Item Icon. The service line will expand to allow the entry of data.

Figure 5-20: Special Ed Services Line
2. All items are required. Other items should be completed as directed by your district.

   a. **Service** – From the drop down box, select the service the student is to receive. This table is district controlled. Possible entries might be Indirect, Direct, or Consultation.

   b. **Area of Specially Designed Instruction** – Select the area in which the service will be provided. This table is district controlled. This field may be labeled “Content Area” for some districts.

   c. **Continued Service** - This box should be checked if the services being entered will continue exactly as entered into the next school year. An example of a Continued Service would be a service for an IEP running from February to February. The first service would begin in February and end in June when school is out. The second service would show that the service will continue from August through February of the next school year. The second service would be marked as a **Continued Service**. (Some districts do not use this feature.)

   d. **Begin Date** – The date the service is scheduled to begin.

   e. **End Date** – The date the service is scheduled to end.

   f. **Responsible Staff** – Enter the name of the staff member responsible for ensuring that this service is being provided.

   g. **Service Implementer** – Enter the name of the staff member responsible for implementing the service. (Responsible Staff and Implementer may be the same person.)

   h. **Other Providers** – If the person implementing the service is not a district staff member, or if there are additional providers for this service, type the name of the other provider here.

   i. **Location** – Enter the Location the student will receive this service.

   j. **Location Description** – If “Other” is chosen in the Location field, type the description of the other location here.

   k. **Duration** - Number of sessions per time period. For example, if the child receives the service 5 hours per week, **5** is the duration. The Duration/Time/Frequency fields explain to the parent how the student will receive services and appear in the IEP document.

   l. **Time Period** - The division of time for which the student will be receiving services (hours, periods, minutes, blocks, etc.). For example, if the child receives the service 5 hours per week, **hours** will be the time period. The Duration/Time/Frequency fields explain to the parent how the student will receive services and appear in the IEP document.

   m. **Frequency** - How often the service is required (daily, weekly, monthly, etc.). For example, if the child receives the service 5 hours per week, **week** will be the frequency. The Duration/Time/Frequency fields explain to the parent how the student will receive services and appear in the IEP document.

   n. **Hours/Minutes per week** - How many hours or minutes per week the student will be receiving the service. While the user may have used hours or minutes per week in the duration/time/frequency fields, those fields are to explain to the parent how the student will receive services. The Hours/minutes per week field is used for state reporting to determine percentage of time in Special Education. **NOTE:** Even if the Duration/Time/Frequency above is stated in hours or minutes, the **Hours/Minutes per week** field must be completed. This field is used for state reporting to determine percentage of time in Special Education.

   o. **Outside General Ed** - Check this box if the service is being provided outside the regular class setting (pull-out time).
p. **Include in Total Service Time** - Check this box if the service being entered is being counted in the total SPED service time for the student. For most services this box will be checked.

![Figure 5-21: Special Education services entered](image)

3. Click **NEXT** to go to the next question or **SAVE** if you need to add another service.

**REMEMBER:** Depending on the length of time that has been set for the application to log you off for inactivity, this may be a screen that you want to save periodically. Remember, the application does not recognize activity on a particular screen (e.g., entering information into a field), it only recognizes moving from screen to screen or using the Save feature as activity. Although you will receive a warning prior to the application logging you out, any information since the last save will be lost if you are timed out.

4. Repeat steps 1-3 to enter additional services.

**Terminating Services in the IEP**

As a student continues through the Special Education process, CLARITY builds a history of the student’s eligibility and Special Education and Related Services. It is important that this history be maintained to allow the student’s service providers access to the information describing how the student reached their present instruction. For that reason Special Education and Related Services for a student are never deleted from CLARITY. Instead, the service is terminated indicating that the service was stopped on a particular date.

**Terminating Carried Forward Services**

Often services may change from one year to the next for a student. For example, the student may no longer require the Math services found in his current IEP, but may require Reading services instead. In CLARITY, all services with the same ending date as the Current Service Plan will be “carried forward” from the student’s last IEP into the new IEP questionnaire. Since the Math service will no longer be needed, it must be terminated and the Reading services entered.

To terminate a Special Education/Related service no longer needed:

1. On the questionnaire screen, find the line item containing the service that is no longer needed. In Figure 5-19 below, the Math Service will be terminated.

![Figure 5-22: IEP Special Education Service screen](image)
2. In the Math line item, on the far right of the screen, enter the termination date and termination reason for this service.

   **Figure 5-23: Special Education detail screen**

<table>
<thead>
<tr>
<th>Hours per week</th>
<th>Continued Service?</th>
<th>Outside Reg Cls?</th>
<th>Special Ed Time?</th>
<th>Termination Date</th>
<th>Termination Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.00</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td></td>
<td>(none)</td>
</tr>
<tr>
<td>1.00</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>10/24/2006</td>
<td>04 - Returned to Regular Ed</td>
</tr>
</tbody>
</table>

3. Click \[\text{Save}\] at the top of the screen or go to the next question.

   **REMEMBER:** The Special Education/Related Service and Content Area may not be changed in a carried forward service. If a service or Content Area has changed, the Carried Forward service must be terminated and a new service entered.

   **REMEMBER:** You may only enter one service per content area and location in CLARITY. For example, you may only enter one Direct Instruction in the Resource Room in the content area of Math. You may enter another Direct Instruction in another area (Reading for example), or add an Indirect Instruction in Math, but you cannot duplicate a service by entering another Direct Instruction in Math in the Resource room unless the “Continued Service” box has been checked.

### Entering Assessment Information

Like the Special Education and Related Services questions, the State and District Assessment question is a Combination question. The user is required to enter information for each assessment separately on separate lines.

   **Figure 5-24: Sample State/District Assessment screen**

   Enter the assessments that this student will be taking and the appropriate accommodations if they are applicable.

   **NOTES FOR STATE ACCOMMODATIONS:**
   Note(1): Oral reading for Communication Arts invalidates the test resulting in the child being reported in Level not Determined, except for children identified as Blind/Visually Impaired who use oral reading as their primary instructional method.
   Note(2): Paraphrasing test questions invalidates all MAP Assessments.
   Note(3): If used, the score cannot be compared with scores generated under standard conditions.
   
   **NOTE:** Please DO NOT enter District Alternate Assessments on this page.
The Assessment Area for the Assessment screen is labeled “3 of 3” on the sample screen shown in Figure 5-24 above. Use this area to move from assessment test to assessment test for the student and to add or delete assessments from the IEP.

To move from one assessment page to the next you may use the **Next** and **Previous** button under the “x of y” assessment number. You may also use the “GO TO” box to the right of the “x of y” assessment number. Clicking on the down arrow will show you all of the Assessment pages for the student. Click on the assessment page you wish to see and click **Go**.

When you are finished entering information for one assessment, click **New** to add a new assessment page. Multiple assessment pages stack one upon the other just as paper copies would. Use ‘**Delete**’ to delete an assessment page from the IEP.

**Steps for entering State/District Assessments**

1. Enter the Assessment Test from the dropdown list.
2. Enter the Area of the assessment test.
3. Enter any extended description as needed.
4. Click the **Add Item** icon to add any accommodations to the test area that the student requires. To choose an accommodation, click the checkbox next to the accommodation. When you have selected all the accommodations necessary for the student, click **OK**.

![Figure 5-25: Accommodation selection screen](image)

5. Click **NEXT** to go to the next question or **SAVE** if you need to add another assessment area.

**REMEMBER:** Depending on the length of time that has been set for the application to log you off for inactivity, this may be a screen that you want to save periodically. Remember, the application does not recognize activity on a particular screen (e.g., entering information into a field), it only recognizes moving from screen to screen or using the Save feature as activity. Although you will receive a warning prior to the application logging you out, any information since the last save will be lost if you are timed out.

6. Repeat steps 1-5 to enter additional assessments.
Chapter 6: Terminating Services, Exiting, Inactivating, and Deleting Student Records

There are several ways to indicate that a student is no longer receiving services in CLARITY.

- Terminating the Special Education or Related Services in the IEP questionnaire
- Exiting the student from Special Education
- Inactivating the student in the database
- Deleting the student record

Each of the instances above has a different meaning as well as a different process in CLARITY. Before discussing the steps of completing each of the above, it is important that the user understand the meaning of each term.

This chapter contains the following topics:

- Terminating Special Education or Related Services in the Student Record
- Exiting a Student Record in CLARITY
- Inactivating a Student Record in CLARITY
- Deleting a Student Record in CLARITY

Terminating Special Education or Related Services

Special Education and Related Services are terminated as part of the IEP questionnaire process. When a new IEP is being created for a student, CLARITY “carries forward” all the services from the previous IEP with the same beginning and ending date as the Service Plan. This prevents the user from having to type all the services in again should the student continue to receive the same services as the previous year.

Should the service be continued but the number of hours the student will be receiving the services change for the upcoming year, the hours per week may be edited by opening the service line item and changing the hours. However, no changes can be made concerning the location of the service or the content area the service is being provided for. To change these areas, the service must be terminated and the new service entered. For more information see Chapter 6: “Terminating Special Education Services” in Section 3 of this guide.

Exiting a student from Special Education

A student will be exited from Special Education when they are no longer receiving Special Education and Related Services. The student would remain active in CLARITY until his/her information is no longer needed for state reporting.
For example, a student who moves out of district in October would need to be exited from Special Education so that he no longer shows up on the caseload reports, but will not be inactivated in CLARITY because the student’s data would need to be counted in the December 1 report that most states require.

Steps for exiting a student

1. On the appropriate Sidebar menu, click
2. From the student list, use the filter feature to find the student who needs to be exited.
3. On the Student Personal Information screen, find the Student Exit section of the screen.

4. Enter the exit date and exit reason. You may also enter additional notes regarding the exit in the Notes field of this section if desired.
5. Click at the top of the screen.
6. Once the student’s data is no longer needed for state reporting, follow the steps below to inactivate the student record.

Inactivating a student in CLARITY

An inactive student is a student who no longer receives Special Education and Related Services and whose data no longer needs to be included in State Reporting. The student record will remain in CLARITY but will be invisible in the system unless the user specifically chooses to see inactive students.

Inactivating a student:

- Maintains the student record in CLARITY should the district ever need to refer to the record or should the student return to the district.
- Ensures that the student no longer appears on the Case Manager’s caseload report.
- Ensures that the student data no longer appears on any predefined reports unless specified on the screen or report
- Ensures that the student data is no longer included in state reporting

NOTE: It is crucial that the student is not inactivated in CLARITY until the data for the student no longer needs to be included in state reporting.

Steps for inactivating a student record in CLARITY

1. On the appropriate Sidebar menu, click
2. From the student list, use the filter feature to find the student who needs to be exited.

3. On the Student Personal Information screen, find the **Status field** section of the screen and change the status to “Inactive”.

4. If the student has not already been exited from Special Education, enter the exit date and exit reason in the Student Exit section of the screen.

5. Click **Save** at the top of the screen.

---

**Deleting a student record**

Deleting a student record should only be used in extreme circumstances. CLARITY is designed to maintain student records long after the student has left the district. This is to allow the district to reactivate the student if the student should return to the district. Should a student leave and return the student’s history can be consulted to determine what services the student was receiving before he/she left.

The most common reason for deleting a student is if a student is entered into CLARITY by mistake. For example, when attempting to enter Elisa Abbasi into CLARITY, the user accidentally enters Clara Abber and saves the record before the mistake is realized. Clara’s record should be deleted since she was entered by mistake.

**NOTE:** Once a student record has been deleted it **cannot** be recovered. There is no “undo” or “refresh” for the screen when a student is deleted. Therefore, deleting a student record is a **privilege only** administrators should have in CLARITY.
Steps for deleting a student from CLARITY

1. From the appropriate Sidebar menu, click [Delete a Student].

2. From the student list, find the student. For more information on finding a student, see Chapter 4: “Finding a Student Record” in Section 3 of this guide.

3. Once the student has been found, click the [ ] icon at the end of the row. The student record will be deleted from CLARITY.

**NOTE:** A student record cannot be deleted if it has an Evaluation/Review or Service Plan attached to it. Students with Evaluations/Reviews or Service Plans should be inactivated **not** deleted to preserve the student’s data.
Chapter 7: Additional Topics

Amended Service Plans

There are times when users need to make minor changes to the IEP which do not require writing a completely new document. In these instances the user may wish to copy forward all information from the previous IEP and make the required changes to the existing information. For these situations the questionnaire provides the ability to create an “Amended Plan”. When beginning the IEP questionnaire for the first time, users are prompted to select whether this Service Plan is a new plan vs. an Amended Plan.

Figure 1 - Is this an Amended Service Plan?

In an Amended Plan CLARITY still creates a new Service Plan; however, for amendments it copies forward ALL information from the previous IEP and Plan, while allowing users to make their necessary changes. It is important to realize that any attachment identified in the list of required documentation on the System Policy control panel will NOT be copied forward on the amended Service Plan. Instead the user will have to re-generate them.

For example, if a user creates a Current Service Plan for a student and then realizes that the student needs an additional goal, the user creates a new Service Plan and selects the Amended Plan option. This option tells CLARITY to copy forward all of the information from the previous Service Plan and IEP. Now the user can add the missing goal and any objectives, finalize and regenerate the IEP document and set the new Service Plan to Current.

Attaching Outside Documents to the Student Record

There are several areas in CLARITY where documents may be attached. Documents attached to the Student Personal Information screen should be documents that relate to demographic or guardian data, for example custody documents, proof of address, doctor information, or physical histories. Documents attached to the Evaluation/Review screen should be documents that relate to the Evaluation/Review process the student is going through. Notification of meeting notices,
outside evaluations or district evaluation results are possible examples. Attachments to the Service Plan should include any document that relates directly to the services the student is receiving. PT or OT plans, Transition plans, or BIPs are possible examples.

Steps for attaching documents

1. On the Sidebar, locate the screen (Student Personal, Evaluation/Review or Service Plan) you wish to attach the document to.

2. Click the Attachment tab on the screen.

   Figure 7-1: Attachment Tab

3. Click the Add Item icon.

4. A blank detail box will appear.

   Figure 7-2: Blank attachment detail box

5. Enter the name of the attachment. This should be a short description much like you would name a document you were saving on your computer.

6. Click the Browse button. The following screen will appear.

   Figure 7-3: Choose File screen

7. Navigate to the folder where the document you want to attach is located.

8. Click on the document you wish to attach and click open.
9. The document will appear in the **File Name** field.

10. Enter the Source of the attachment.

11. Click the [ ] to close the detail box.

12. Click [ ] at the top of the screen. The attachment will be saved to the Attachment tab.

**Attachment Size limit**

By default, only attachment files that are 4,096 kilobytes (KB) (or 4 megabytes [MB]) or less may be uploaded to the web server. When a request is made to upload an attachment that exceeds this limit, an error will be displayed.

To upload larger files, you must change the **maxRequestLength** parameter of the `<httpRuntime>` section in the Web.config file (the Web.config file is an XML-based text file used to define ASP.NET application configuration settings. The app settings can be revised at any time with minimal impact on the operational web application. This file is located in the \CLARITY folder.

Caution: Any changes made to the Web.config file may cause logged on users’ sessions to be lost. More information on configuring the Web.config file may be found in Chapter 4 of the **CLARITY Installation Guide**).
Determining Percentage of Time in SPED for Students Attending School Less than Full Time

For students who attend school less than full time (Preschool students, students on an abbreviated day) the **Total School Hours per week** on the Service plan screen must be changed to reflect the total number of hours per week the student actually attends school.

**Steps for changing the total school hours per week**

1. On the appropriate menu, click `Modify a Service Plan`
2. From the Student List, find the student.
3. On the Service Plan screen, click the Disabilities and Services tab.
4. In the **Total School Hours per week** field, enter the number of hours the student spends in school each week.
5. To the right of the **Total General Ed Hours/Week** field, click the `Calculate Times` button. CLARITY will recalculate the percentage of time in and out of Special Education.
6. Make changes to the Least Restrictive Environment (Instructional Setting) field as needed.
7. Click `Save` at the top of the screen.

Handling Student Transfers within District in CLARITY

When a student transfers between schools within a district, CLARITY knows about it based on the interface to the district’s Student Information System (SIS). CLARITY notifies a designated person at each school in the district when a student transfer takes place so that the student’s record can be updated to reflect new service providers.

When a student transfers, the transfer administrator for the new school will see that student show up on his/her home page in a new ‘Student Transfer’ section:

**Figure 7-6: Student Transfer section on User’s Home Page**

This page lists all student transfers for a user’s individual school. To change a student’s assignments, the school’s Student Transfer Administrator selects the student’s record from this list to access the new Student Transfer feature (see Figure 7-7).
Student Transfer lets a user see all of a student’s active Evaluations/Reviews, Service Plans and activities as well as their current staff assignments. From this one screen the user can quickly change the staff assignment by selecting the new staff member in the Reassignment Position box, checking the Reassign checkbox next to the appropriate items in the list and clicking the Save toolbar button. A user simply repeats this process to reassign the various items to the correct staff member.

As you can see in the screenshot, Student Transfer organizes all of the various items into categories, such as Student, Evaluation/Reviews, Service Plans, Instructional Services, Related Services, etc. Student Transfer provides a very simple and convenient way to reassign a student’s records to the right staff member.

Another way to access Student Transfer is via the ‘Find a Student Transfer’ and ‘Modify a Student Transfer’ menu items. By default these are found under the Student Sidebar menu;
however, they behave the same as all other menu items in CLARITY and are completely configurable by the administrator.

**Figure 7-8: Student Transfer Menu**

Find a Student Transfer
Modify a Student Transfer
Delete a Student Transfer

**How does the Student Transfer section appear on a user’s home page?**

The district must determine who, per school, will handle transfer students. To do this, there is a Transfer Administrator field on the main tab of the School screen.

**Figure 7-9: Student Transfer Administrator on School Record**

The staff member who is designated as the Student Transfer Administrator will see the Student Transfer section appear on his or her CLARITY home page, listing all students that have transferred to that school.

Student Transfer also uses CLARITY’s security model, and therefore provides two additional access points to this feature. In the Privileges section of a User Group there appears a Student Transfer category. These options allow an administrator to provide List and Update control to members of that User Group. **List** allows users to view a list of the various transfer students, while **Update** gives users the ability to reassign staff members. Also, realize that the user’s Student Access Level must allow the user to access the student’s record in order to perform reassignments. For example, even if a user has the rights to access and update Student Transfer, if his/her Student Access Level doesn’t allow him/her access to that student, then the user won’t be able to reassign any of the student’s items.

**Figure 7-10: Student Transfer privileges**

**Scheduling Annual Reviews and Reevaluation Reviews Due Close to the Same Date**

When the Annual Review is due in the same timeframe as the Triennial Review, districts have the option to prevent the Annual Review from being created. This option should only be selected if all of the activities involved with the Annual Review will be incorporated in the Triennial Review (see the “Include with Triennial Review?” field and “if due within days” fields in the Annual Review section on the System Policy screen):

**Figure 7-11: Include with Reevaluation Review field**
If the Annual Review should not be created when it falls close enough to the Reevaluation Review and the Annual Review’s Due By Date is prior to the Reevaluation Review’s Due By Date, the Reevaluation Review’s Due By Date will be moved up to the Annual Review’s Due By Date to ensure compliance with the Annual Review’s timeline.

Next Evaluation / Review Creation Utility

The Next Evaluation / Review Creation utility is used to automatically create the next Annual and/or Reevaluation Reviews due within a user specified date range. Just as the timelines for an Annual Review can be different than that of a Reevaluation Review, so too can the user specified date range (see Annual Review Generation Days and Reevaluation Review Generation Days on System Policy). The Generation Days should be set far enough ahead of the Timeline Days so that the generated activities appear well enough in advance of the actual due date (so that they can be completed on time). The Next Evaluation / Review Creation utility will only create the Annual and/or Reevaluation Reviews. The activities will need to be generated upon request within CLARITY. All Annual and Reevaluation Reviews created via the Next Evaluation / Review Creation utility will initially appear on the appropriate user’s Home Page in the “Evaluation / Reviews with Unscheduled Activities” section.

A pre-defined report (see Scheduled Process Log in the Reports Menu Group) is available to view the actions attempted by the Next Evaluation / Review Creation utility. It is important that the Scheduled Process Log is reviewed by the CLARITY Administrator in a timely manner. If an Annual and/or Reevaluation Review should be created, but for some reason the Next Evaluation / Review Creation utility could not successfully create it, an entry will appear in the Scheduled Process Log with the reason(s) it could not be created. It is critical that these errors are addressed and the Annual and/or Reevaluation Review are successfully added into CLARITY. The Scheduled Process Log will also identify the Annual and Reevaluation Reviews that were successfully created (and will appear on the appropriate user’s Home Page). Please see the Scheduled Process Log in New Reports for more information on this new report.

Validate vs. Verify

Validate

The Validate process validates the Questionnaire. When reaching the last question in the questionnaire, CLARITY performs a review of all questions and sub questions in the questionnaire. The intent of this review process is to ensure data has been supplied in all data items identified as “required” on the questionnaire. Only those questions and sub questions that are presented to the end user are considered. If a “required” question is not presented due to a decision (navigation) type question a value is not expected. In fact, during the review process, answers provided in “not presented” questions are removed during the review process (and when selecting END).

Verify

The Verify process reviews requirements for the Service Plan. It verifies that all data required for setting a service plan to a status of ‘Planned’ or ‘Current’ has been entered. It reviews data not only required on the service plan screen but also on the evaluation screens.
The following are items CLARITY “requires” in order to take a Service Plan to Planned/Current (Verify):

- Begin and End Dates on the Service Plan
- Begin and End Dates on all services
- Primary Exceptionality
- IEP Meeting Date
- Objectives entered for each Goal (if required by the district)

The rest of the “required” data items are defined by state. For example: not all states that use Supplementary Aids and Services use the Location, Duration, and Frequency fields.

If the appropriate data has not been entered as the end user attempts to set the Service Plan to Planned/Current, the attempt to change the status will be rejected and error messages displayed. The Verify button simply runs the same process to ensure the Service Plan CAN BE set to Planned/Current, without actually having to change the status of the Service Plan and saving it.

This helps the teacher know that the Service Plan is complete and any Document can be generated and attached as a Final version.
Appendix
## Appendix A - Quick Reference for Icons

<table>
<thead>
<tr>
<th>ICON</th>
<th>DESCRIPTION</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Home Icon" /></td>
<td><strong>HOME</strong></td>
<td>Returns user to Home Page from any screen in CLARITY except screens in questionnaires.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh Icon" /></td>
<td><strong>REFRESH</strong></td>
<td>Returns page to status immediately after last save. If changes have been made on the screen but not saved, clicking Refresh ignores the changes and returns the screen to its setup prior to the changes.</td>
</tr>
<tr>
<td><img src="image" alt="Print Icon" /></td>
<td><strong>PRINT</strong></td>
<td>Prints screen that is currently displayed.</td>
</tr>
<tr>
<td><img src="image" alt="Past Due Activities Icon" /></td>
<td><strong>PAST DUE ACTIVITIES</strong></td>
<td>Identifies all activities that can no longer be completed within the timelines set by district, reflects activities that are past the due date set by the district.</td>
</tr>
<tr>
<td><img src="image" alt="Current Due Activities Icon" /></td>
<td><strong>CURRENT DUE ACTIVITIES</strong></td>
<td>Identifies activities due within the next days and weeks.</td>
</tr>
<tr>
<td><img src="image" alt="Future Due Activities Icon" /></td>
<td><strong>FUTURE DUE ACTIVITIES</strong></td>
<td>Identifies activities due in the near future.</td>
</tr>
<tr>
<td><img src="image" alt="Binoculars Icon" /></td>
<td><strong>BINOCULARS</strong></td>
<td>Indicates field must be populated by data in table shown when binoculars are chosen. A predefined list of choices appears.</td>
</tr>
<tr>
<td><img src="image" alt="Red Diamond Icon" /></td>
<td><strong>RED DIAMOND</strong></td>
<td>Indicates required fields which must have information entered into them. If the information is not entered, the program will not allow the user to save the screen.</td>
</tr>
<tr>
<td><img src="image" alt="Notepad Icon" /></td>
<td><strong>NOTEPAD</strong></td>
<td>The notepad shows all text entered into a field regardless of how much text has been entered.</td>
</tr>
<tr>
<td><img src="image" alt="Questionnaire Icon" /></td>
<td><strong>QUESTIONNAIRE</strong></td>
<td>Choose the questionnaire icon when you wish to answer questions in a questionnaire. Examples of questionnaires are as follows: IEP; Notification of Meeting; Behavior Intervention Plan.</td>
</tr>
<tr>
<td><img src="image" alt="Document Icon" /></td>
<td><strong>DOCUMENT</strong></td>
<td>Choose the document icon to create a draft or final version of a document after answering the questionnaire appropriate to that particular document. Examples of documents are as follows: IEP, Notification of Meeting, Behavior Intervention Plan, and Progress Reports.</td>
</tr>
<tr>
<td><img src="image" alt="Save Icon" /></td>
<td><strong>SAVE</strong></td>
<td>Use to manually save information. In IEP Questionnaire information is automatically saved when Previous, Next, or End is pressed, but on other screens information must be manually saved.</td>
</tr>
<tr>
<td><img src="image" alt="End Icon" /></td>
<td><strong>END</strong></td>
<td>In questionnaire takes user out of questionnaire giving user the ability to return to the Home Page or navigate elsewhere in the program.</td>
</tr>
<tr>
<td><img src="image" alt="Previous Icon" /></td>
<td><strong>PREVIOUS</strong></td>
<td>In questionnaires takes user to previous question.</td>
</tr>
<tr>
<td><img src="image" alt="Next Icon" /></td>
<td><strong>NEXT</strong></td>
<td>In questionnaire takes user to next question.</td>
</tr>
<tr>
<td>Icon</td>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>---------</td>
<td>-------------</td>
</tr>
<tr>
<td><img src="image1.png" alt="Validate Icon" /></td>
<td>VALIDATE</td>
<td>In questionnaire gives user the ability to ensure that all red diamond areas have been properly filled in</td>
</tr>
<tr>
<td><img src="image2.png" alt="Drop Down Icon" /></td>
<td>DROP DOWN</td>
<td>Clicking on icon will reveal a drop down of information. In the questionnaire the demographic information of the child will appear. In the side bar a list of functions that can be performed will appear</td>
</tr>
<tr>
<td><img src="image3.png" alt="Add Item Icon" /></td>
<td>ADD ITEM</td>
<td>Enables users to add a line of data. This icon applies inside and outside of the questionnaire</td>
</tr>
<tr>
<td><img src="image4.png" alt="Edit Item Icon" /></td>
<td>EDIT ITEM</td>
<td>Enables user to edit an existing line of data. This icon applies inside and outside of the questionnaire</td>
</tr>
<tr>
<td><img src="image5.png" alt="Delete Item Icon" /></td>
<td>DELETE ITEM</td>
<td>Enables user to delete a line. This icon applies inside and outside of the questionnaire</td>
</tr>
<tr>
<td><img src="image6.png" alt="Save Changes Icon" /></td>
<td>SAVE CHANGES</td>
<td>Saves changes inside a box within a question in the questionnaire. If neither save nor cancel is chosen the user will receive a warning that unsaved changes exist</td>
</tr>
<tr>
<td><img src="image7.png" alt="Cancel Changes Icon" /></td>
<td>CANCEL CHANGES</td>
<td>Cancels changes inside a box within a question in the questionnaire. If neither save nor cancel is chosen the user will receive a warning that unsaved changes exist</td>
</tr>
<tr>
<td><img src="image8.png" alt="Add Item from Folder List Icon" /></td>
<td>ADD ITEM FROM FOLDER LIST</td>
<td>Enables user to choose several items from a dropdown list.</td>
</tr>
<tr>
<td><img src="image9.png" alt="Spell Check Icon" /></td>
<td>SPELL CHECK</td>
<td>Checks spelling of text in box next to icon. These checkers exist throughout the questionnaire.</td>
</tr>
</tbody>
</table>
These code definitions are for the objective bank provided by CLARITY. They do not reflect any objectives added into the application by the district.

<table>
<thead>
<tr>
<th>CODE</th>
<th>OBJECTIVE AREA</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGA</td>
<td>GEN. ACADEMIC SKILLS</td>
<td>GENERAL OBJECTIVES</td>
</tr>
<tr>
<td>AHEAE</td>
<td>HEALTH EDUCATION</td>
<td>EMERGENCY</td>
</tr>
<tr>
<td>AHEAP</td>
<td>HEALTH EDUCATION</td>
<td>ACCIDENT PREVENTION &amp; SAFETY</td>
</tr>
<tr>
<td>AHECA</td>
<td>HEALTH EDUCATION</td>
<td>CHEMICAL SUBSTANCE USE/ABUSE</td>
</tr>
<tr>
<td>AHECE</td>
<td>HEALTH EDUCATION</td>
<td>COMMUNITY/ENVIRONMENTAL HEALTH</td>
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<tr>
<td>AHECH</td>
<td>HEALTH EDUCATION</td>
<td>CONSUMER HEALTH</td>
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<td>HEALTH EDUCATION</td>
<td>FIRST AIDE</td>
</tr>
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<td>AHEFL</td>
<td>HEALTH EDUCATION</td>
<td>FAMILY LIFE</td>
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<td>AHEGD</td>
<td>HEALTH EDUCATION</td>
<td>GROWTH &amp; DEVELOPMENT</td>
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<td>HUMAN BODY</td>
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<td>HEALTH PROMOTION/DISEASE PREVENTION</td>
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<td>MENTAL/EMOTIONAL HEALTH</td>
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<td>Report Description</td>
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</tr>
<tr>
<td>Admin Activity Template Report</td>
<td>This report lists all the activities for each Activity Template and the configuration of each.</td>
<td></td>
</tr>
<tr>
<td>Admin Calendar Days</td>
<td>This report summarizes all the school calendars and denotes which are school days and which are business days.</td>
<td></td>
</tr>
<tr>
<td>Admin School Responsibility Area</td>
<td>This report summarizes the Responsibility Areas as configured on the individual School screens.</td>
<td></td>
</tr>
<tr>
<td>Admin System Policy</td>
<td>This report summarizes all the fields on the system policy screen.</td>
<td></td>
</tr>
<tr>
<td>Admin User Groups</td>
<td>This report lists all the User Groups and the privileges associated with each.</td>
<td></td>
</tr>
<tr>
<td>Annual Review IEP Due</td>
<td>This report lists all Annual IEP Reviews Due based on the Next Annual Review Due Date in the Current Service Plan.</td>
<td></td>
</tr>
<tr>
<td>Alphabetical &amp; Sequential Student Listing</td>
<td>This report lists students in alphabetical order, with a leading sequence number to uniquely identify each student.</td>
<td></td>
</tr>
<tr>
<td>Application Event Log</td>
<td>This report is used to review the Windows application event log. The application log contains events logged by applications or programs. If an unexpected error occurs within CLARITY, an entry will be written to this log. Using the application event log, you can gather information about hardware, software, and system problems.</td>
<td></td>
</tr>
<tr>
<td>Assessment &amp; Accommodation Report</td>
<td>This report lists Assessment and Accommodations/Modifications for students based on School and Active Service Plans.</td>
<td></td>
</tr>
<tr>
<td>Caseload Analysis</td>
<td>The Caseload Analysis reports Service Plan information, including Special Education Instructional Services and Related Service information for students.</td>
<td></td>
</tr>
<tr>
<td>Disability List</td>
<td>This report shows the essentially unique codes and their descriptions for the Disability Table.</td>
<td></td>
</tr>
<tr>
<td>Ethnicity List</td>
<td>This report shows the essentially unique codes and their descriptions for the Ethnicity Table.</td>
<td></td>
</tr>
<tr>
<td>Evaluation and Review Activities</td>
<td>This report contains Evaluation and Review Activity information for students as assigned to Staff Members.</td>
<td></td>
</tr>
<tr>
<td>Exceptionality List</td>
<td>This report shows the essentially unique codes and their descriptions for the Exceptionality Table.</td>
<td></td>
</tr>
<tr>
<td>Exceptional Student Class List</td>
<td>This report contains Student Class information for students with Active Service Plans by School and IEP Coordinator. This report contains a worksheet for class projections.</td>
<td></td>
</tr>
<tr>
<td>Exceptional Student Master Class List</td>
<td>This report contains Student Class information for students with Active Service Plans by School. This report contains a worksheet for class projections.</td>
<td></td>
</tr>
<tr>
<td>Extended School Year Report</td>
<td>This report contains Extended School Year information for students by School and IEP Coordinator.</td>
<td></td>
</tr>
<tr>
<td>Report Type</td>
<td>Description</td>
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</tr>
<tr>
<td>Federal Reports</td>
<td>All Federal reports are based on the latest specifications from the federal government. Most of the reports calculate counts based on the December 1 submission date, so these reports have only one report parameter for the report date.</td>
<td></td>
</tr>
<tr>
<td>General Curriculum Accommodation List</td>
<td>This report shows the essentially unique codes and their descriptions for the General Curriculum Accommodation Table.</td>
<td></td>
</tr>
<tr>
<td>Goal List</td>
<td>This report shows the essentially unique codes and their descriptions for the Goal Table.</td>
<td></td>
</tr>
<tr>
<td>Objective List</td>
<td>This report shows the essentially unique codes and their descriptions for the Objective Table.</td>
<td></td>
</tr>
<tr>
<td>Post Graduate Activity Survey</td>
<td>This report lists all Post-Graduate Activities for Students based on the Diploma/Graduation Status, Graduation Year and Post-Grad Activity in the Student Personal Information screen, based on School and Student Exit Date.</td>
<td></td>
</tr>
<tr>
<td>Questionnaire Verification</td>
<td>This report produces a list of all questions and possible responses in the IEP questionnaire. This report is used to review the layout of each questionnaire. It will also show the number and text of each question in the order it appears in the questionnaire, whether a particular question is required for validation purposes, where in the database the entered data is stored, queries for navigation purposes, and the lookup/choice table associated to each question. It is important to note that Choice tables do not have associated tables in the application and their values appear at the end of the Questionnaire Verification Report for review. Choice tables are controlled by the Forms Department.</td>
<td></td>
</tr>
<tr>
<td>Related Service List</td>
<td>This report shows the essentially unique codes and their descriptions for the Related Service Table.</td>
<td></td>
</tr>
<tr>
<td>Related Services Report</td>
<td>This report contains Related Service information for students as defined in the selected Service Plan(s).</td>
<td></td>
</tr>
<tr>
<td>Related Services by Provider</td>
<td>This report contains Related Service information for students as defined in the selected Service Plan(s). Similar to the Related Services report, instead of filtering the list using a parameter for IEP Coordinator, this report filters the list using a parameter for the Primary Service Provider as defined in the Related Service record.</td>
<td></td>
</tr>
<tr>
<td>Scheduled Process Log</td>
<td>This report is used to view the actions attempted by the Next Evaluation / Review Creation utility and/or Service Plan Status Change utility. It is important that the Scheduled Process Log is reviewed by the CLARITY Administrator on a regular basis. If the system identified an update that should be completed, but for some reason the appropriate utility could not successfully apply that update, an entry will appear in the Scheduled Process Log with the reason(s) it could not be updated. It is critical that these errors are addressed and the required updates are successfully applied within CLARITY. The Scheduled Process Log will also identify successfully updated records.</td>
<td></td>
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<tr>
<td>School Directory of Students</td>
<td>This report contains a directory of student information by Enrollment School.</td>
<td></td>
</tr>
<tr>
<td>School List</td>
<td>This report shows the essentially unique codes and their descriptions for the School Table.</td>
<td></td>
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<tr>
<td>Service Plan Status Report</td>
<td>This report contains a list of students with Service Plans, and the status of the Service Plans within a specified date range.</td>
<td></td>
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<tr>
<td>Report Name</td>
<td>Description</td>
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<tr>
<td>Special Ed Service</td>
<td>This report contains Special Ed Service information for students as defined in the selected Service Plan(s).</td>
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</tr>
<tr>
<td>Staff/Position List</td>
<td>This report shows the essentially unique codes and their descriptions for the Staff Table and their Associated Positions.</td>
<td></td>
</tr>
<tr>
<td>State Exit Code List</td>
<td>This report shows the essentially unique codes and their descriptions for the State Exit Code Table.</td>
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<tr>
<td>Student Demographic</td>
<td>This report contains Demographic information for students.</td>
<td></td>
</tr>
<tr>
<td>Student Exit Reason List</td>
<td>This report shows the essentially unique codes and their descriptions for the Student Exit Reason Table.</td>
<td></td>
</tr>
<tr>
<td>Student Exit Verification Report</td>
<td>This report is distributed by the Forms team on an as needed basis, depending upon whether any district forms include the exiting of a student from Special Education from within any questionnaire. Later versions of CLARITY close out all Evaluations and the Service Plan if an exit date and reason are entered; this makes them unavailable for access by any questionnaire. Therefore, any form development that includes a student exit question states: &quot;Note: This student must be formally exited via the Student Personal screen after all documents have been finalized.&quot; The purpose of the &quot;Student Exit Verification Report&quot; is to compare exit information via the questionnaire with exits via student personal to ensure all students have been properly exited in CLARITY.</td>
<td></td>
</tr>
<tr>
<td>Student List</td>
<td>This report produces an alphabetical list of students in the</td>
<td></td>
</tr>
<tr>
<td>Student List by Exceptionality &amp; Age</td>
<td>This report calculates student ages based on birth date and the current date, and allows filtering by specific exceptionalities.</td>
<td></td>
</tr>
<tr>
<td>Triennial Review IEP Due</td>
<td>This report lists all Triennial IEP Reviews Due based on the Next Triennial Review Due Date in the Current Service Plan.</td>
<td></td>
</tr>
</tbody>
</table>