

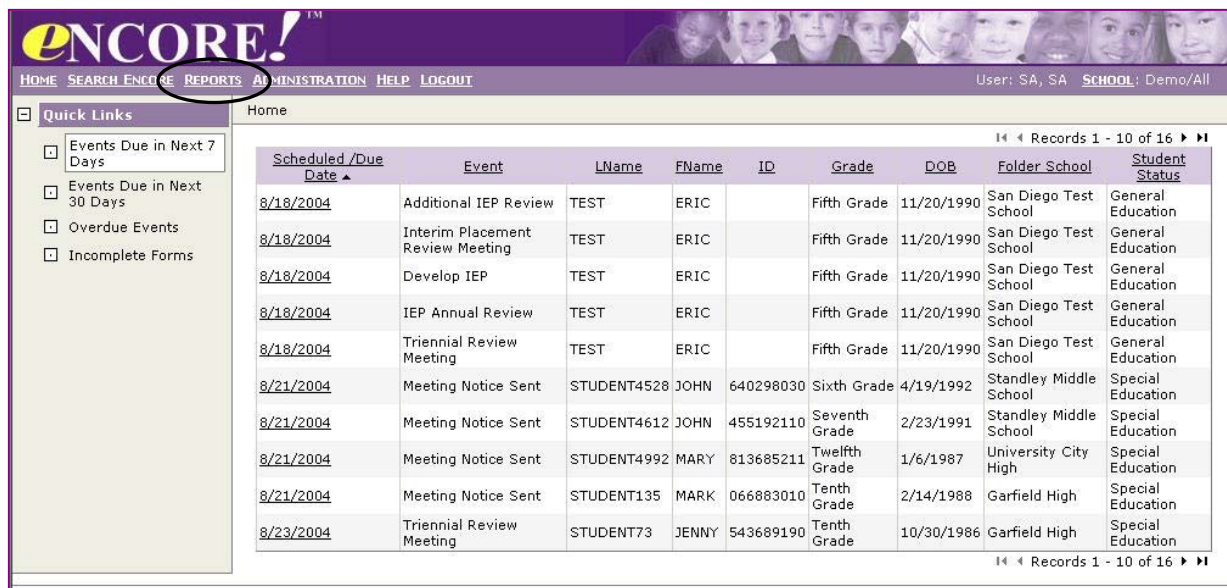
# Correcting Reports

Version 1.3 • Updated March, 2007

When running reports there are several issues that providers need to check to ensure that the report is accurate and reflects the correct students.

*Follow the steps below to correct the data in reports.*

- Run the desired report. For the purposes of this job aid, the IEP Caseload by Provider report will be illustrated. However, the process is similar for all reports.  
Other reports providers may wish to run include  
    Student → Alpha Report by Service  
    Principal's Management → Special Ed Roster
- Complete Steps 1-5. Step 1 is shown below. Steps 2-5 are on the following pages.

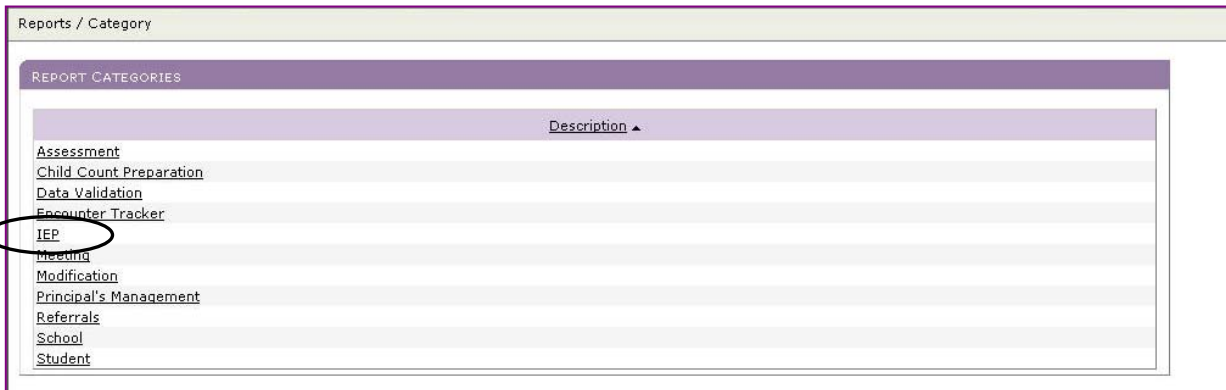


The screenshot shows the ENCORE! web application interface. The navigation bar includes links for HOME, SEARCH, ENCORE, **REPORTS**, ADMINISTRATION, HELP, and LOGOUT. The 'REPORTS' link is circled. Below the navigation bar, there is a 'Quick Links' sidebar with options like 'Events Due in Next 7 Days', 'Events Due in Next 30 Days', 'Overdue Events', and 'Incomplete Forms'. The main content area displays a table of events with columns for Scheduled/Due Date, Event, LName, FName, ID, Grade, DOB, Folder School, and Student Status. The table contains 13 rows of data, including events like 'Additional IEP Review', 'Interim Placement Review Meeting', 'Develop IEP', 'IEP Annual Review', 'Triennial Review Meeting', and 'Meeting Notice Sent'.

Scheduled/Due Date	Event	LName	FName	ID	Grade	DOB	Folder School	Student Status
8/18/2004	Additional IEP Review	TEST	ERIC		Fifth Grade	11/20/1990	San Diego Test School	General Education
8/18/2004	Interim Placement Review Meeting	TEST	ERIC		Fifth Grade	11/20/1990	San Diego Test School	General Education
8/18/2004	Develop IEP	TEST	ERIC		Fifth Grade	11/20/1990	San Diego Test School	General Education
8/18/2004	IEP Annual Review	TEST	ERIC		Fifth Grade	11/20/1990	San Diego Test School	General Education
8/18/2004	Triennial Review Meeting	TEST	ERIC		Fifth Grade	11/20/1990	San Diego Test School	General Education
8/21/2004	Meeting Notice Sent	STUDENT4528	JOHN	640298030	Sixth Grade	4/19/1992	Standley Middle School	Special Education
8/21/2004	Meeting Notice Sent	STUDENT4612	JOHN	455192110	Seventh Grade	2/23/1991	Standley Middle School	Special Education
8/21/2004	Meeting Notice Sent	STUDENT4992	MARY	813685211	Twelfth Grade	1/6/1987	University City High	Special Education
8/21/2004	Meeting Notice Sent	STUDENT135	MARK	066883010	Tenth Grade	2/14/1988	Garfield High	Special Education
8/23/2004	Triennial Review Meeting	STUDENT73	JENNY	543689190	Tenth Grade	10/30/1986	Garfield High	Special Education

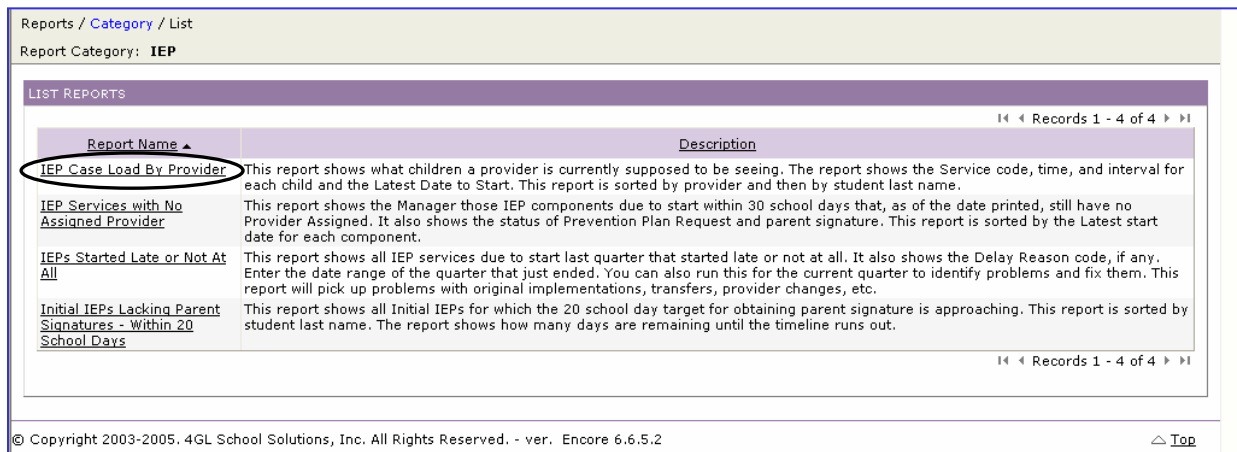
1. To retrieve a report, select the REPORTS link from the Main Navigation bar.

The Report Categories page appears.



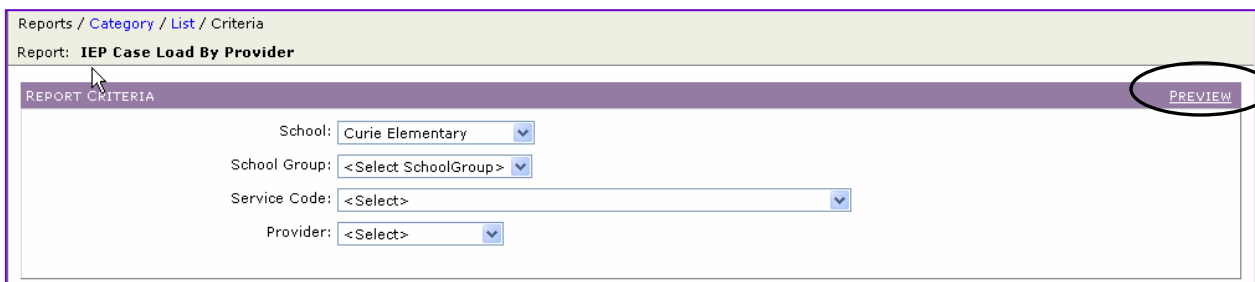
2. To run the “IEP Caseload by Provider,” select the IEP link.

A list of reports displays.



3. Select the IEP Caseload by Provider link.

The Report Criteria screen appears.












Select the appropriate criteria on the Report Criteria page. (You can leave the Service Code blank to run the report for the whole school or select a Service Code to run the report for a specific service.) Next, select the PREVIEW link from the Report Criteria title bar

The report preview will be displayed.


## Elements of Reports

Depending on the report and the Adobe Acrobat version, various elements will be available:

Element	Name	Description/Function
	Show/Hide Group Tree	Displays the Group Tree on the left of each report result record.
	Export	Allows the report to be exported in one of several formats, such as Crystal Reports™ RPT, Adobe Acrobat™ PDF, MS Word, Excel, or Rich Text Format.
	First	Moves to the first result of a multiple result report.
	Previous	Moves to the previous result of a multiple result report.
	Next	Moves to the next result of a multiple result report.
	Last	Moves to the last result page of a multiple result report.
	Go To (result)	Moves to a specified result of a multiple result report.
	Find	Searches current result for specific text.
100% 	Zoom drop-down list	Increases or decreases the magnification of the report view.

4. To print the report, select the Print button (  ) from the tool bar.

Report Category: IEP Report Name: IEP Case Load By Provider [RETURN TO REPORT CRITERIA](#)

1 of 16 100% Find | Next Select a format Export 

### IEP Caseload By Provider

San Diego Unified School District  
Jones Elementary  
Provider: [Baker, Barbara](#)  
Managing School: 0159A-Jones Elementary

Student Name	Student ID	DOB	Grade	Last Evaluation	IEP Date	Service	Servicing School	Session ID	Latest Date to Start	Time	Session	Hours Per Week
ARMSTRONGS, ELIZABETH	43319	10/20/00	01	7/13/2006	7/13/2006	Non Severe SDC	Jones Elementary		9/14/2006	28/H	0W	0.0
BLANE, WYNELL	011300048	1/13/00	01	12/14/2006	12/14/2006	Non Severe SDC	Jones Elementary		2/2/2007	25/H	1W	25.0
BONNET, AUSTEN	053800171	5/26/00	01	6/19/2006	6/19/2006	Non Severe SDC	Jones Elementary		9/19/2006	24/H	0W	0.0
Fries, William	000700048	9/7/00	01	12/4/2006	12/4/2006	Non Severe SDC	Jones Elementary		1/23/2007	25/H	1W	25.0
LYNN, BRANCHINI	033100353	3/10/00	01	1/19/2006	6/19/2006	Non Severe SDC	Jones Elementary		9/27/2006	25/H	0W	0.0
WICKIRNEY, IAN	062500057	6/25/00	K	11/5/2003	5/2/2006	Non Severe SDC	Jones Elementary		5/23/2006	30/H	0W	0.0
PEREZ-DICKSON, SAMUEL	012300028	1/23/00	K	1/16/2004	5/10/2006	Non Severe SDC	Jones Elementary		5/31/2006	-	0-	0.0

Print the report

Enter the page range that you would like to Print.

All

Pages

From:  To:

To Print:

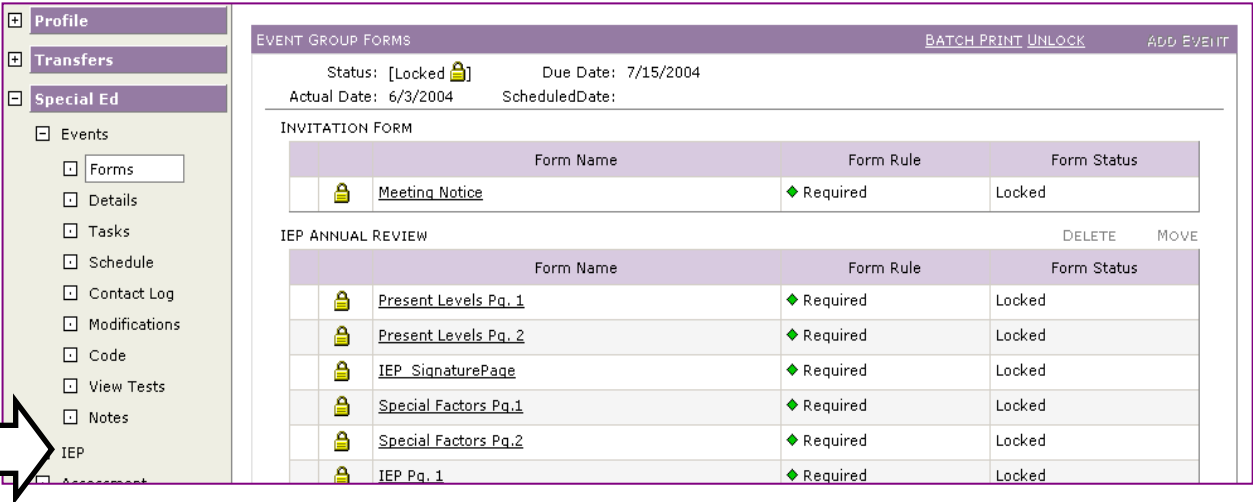
1. In the next dialog that appears, select the "Open this file" option and click the OK button.
2. Click the printer icon on the Acrobat Reader Menu rather than the print button on your internet browser.

The "Print the Report" page appears. Select either All or a certain range of pages and then select the Print button.

The Report will be reconfigured. Use the Print button on the Adobe Acrobat™ toolbar to print the report so that the report format will be correct.

Completing tasks after locking IEPs takes care of many of the component details. There are some situations that require additional steps to be taken.

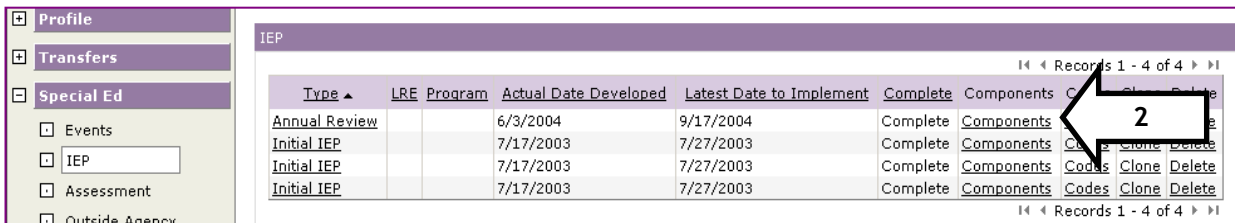
- If students are showing who have left the district, due diligence must be performed. Then the exit form needs to be completed and submitted.
- If students' names are not on the report, check the component details to make corrections.
- Complete Steps 1-6. Steps 1 and 2 are shown below. Steps 3-5 are on the following pages.



1

1. From within the student's record select IEP.

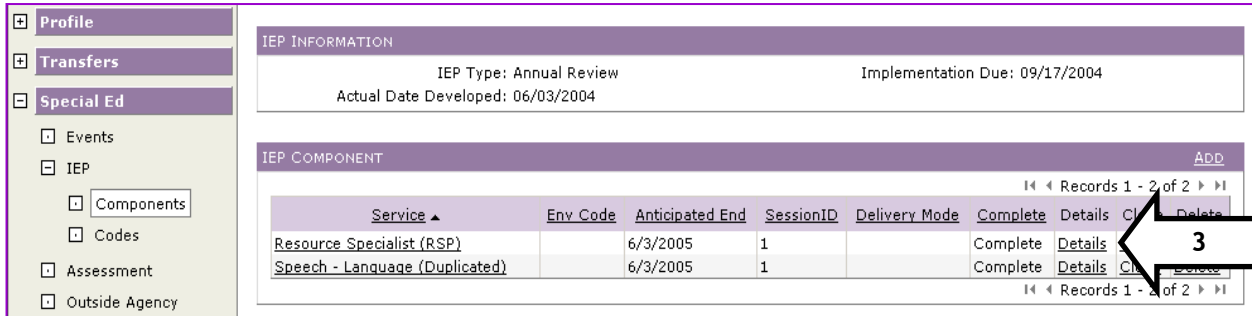
All IEP's display on the screen. The most recent IEP is usually at the top of the list.



2

2. Click the Components link. (Remember links are underlined.)

IEP Components are displayed. (If the service is not displayed it may not have been included on page 1 of the IEP. To check, choose the Special Ed Events and open the most recently completed IEP. If the service is on page one of the IEP but not listed as a component, contact Encore Support to get it added.)



**IEP INFORMATION**

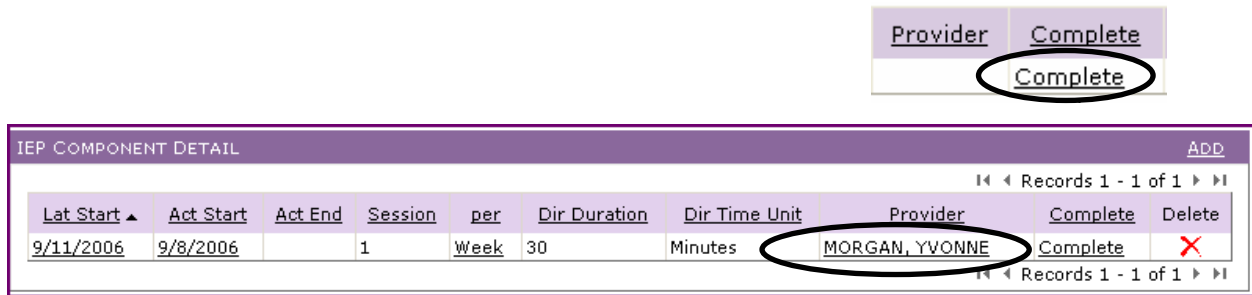
IEP Type: Annual Review      Implementation Due: 09/17/2004  
Actual Date Developed: 06/03/2004

**IEP COMPONENT**

Service	Env Code	Anticipated End	SessionID	Delivery Mode	Complete	Details	Close	Delete
Resource Specialist (RSP)		6/3/2005	1		Complete	Details		
Speech - Language (Duplicated)		6/3/2005	1		Complete	Details		

3. Click the Details link for the desired service.

Summary details are displayed.

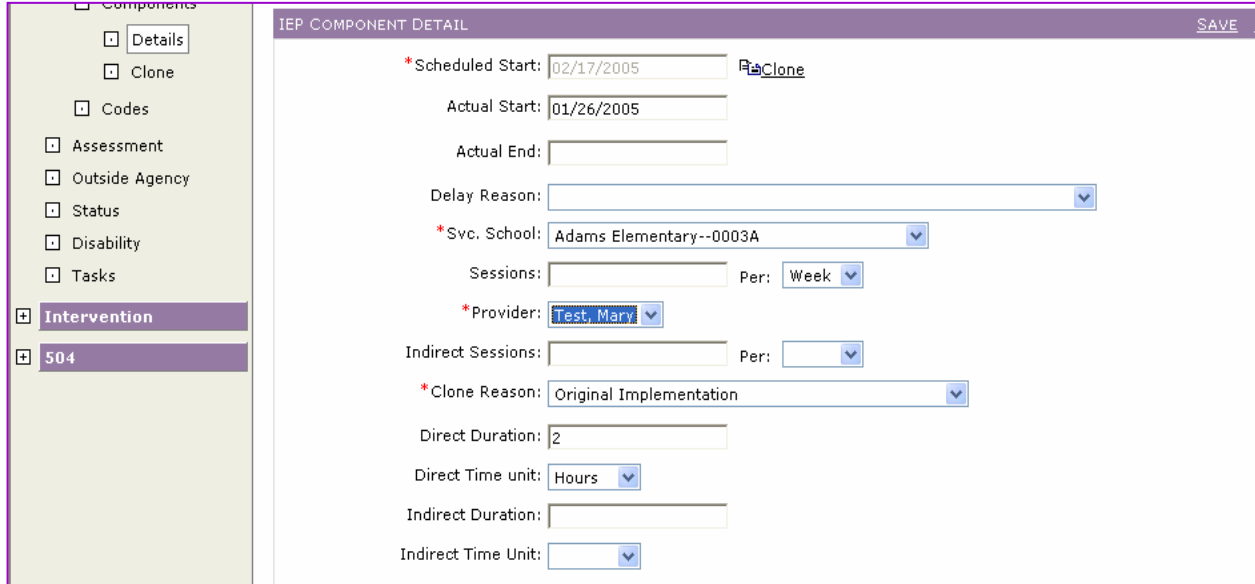


**IEP COMPONENT DETAIL**

Lat Start	Act Start	Act End	Session	per	Dir Duration	Dir Time Unit	Provider	Complete	Delete
9/11/2006	9/8/2006		1	Week	30	Minutes	MORGAN, YVONNE	Complete	X

4. Select the Complete link adjacent the empty Provider field or the current provider's name.

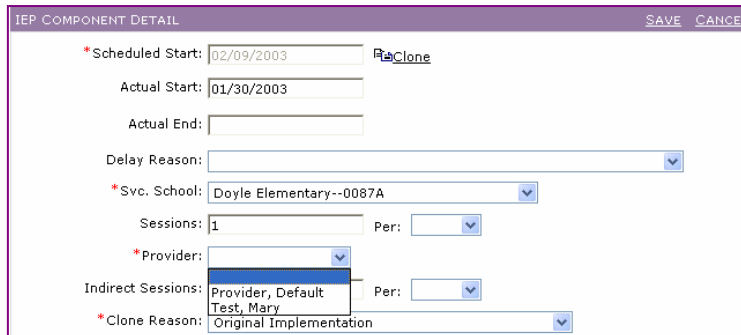
All details regarding the service are displayed. Red asterisk fields are required.



The screenshot shows the 'IEP COMPONENT DETAIL' form. On the left is a navigation menu with options: Components, Details, Clone, Codes, Assessment, Outside Agency, Status, Disability, Tasks, Intervention, and 504. The main form area contains the following fields:

- \* Scheduled Start: 02/17/2005 (with a Clone button)
- Actual Start: 01/26/2005
- Actual End: (empty)
- Delay Reason: (dropdown menu)
- \* Svc. School: Adams Elementary--0003A (dropdown menu)
- Sessions: (input field) Per: Week (dropdown menu)
- \* Provider: Test, Mary (dropdown menu)
- Indirect Sessions: (input field) Per: (dropdown menu)
- \* Clone Reason: Original Implementation (dropdown menu)
- Direct Duration: 2 (input field)
- Direct Time unit: Hours (dropdown menu)
- Indirect Duration: (input field)
- Indirect Time Unit: (dropdown menu)

- If students currently have a different provider who is unknown, the Actual End date should be completed and the SAVE link selected. This action will remove the student from the provider's caseload report.
- To add a new provider, select Clone (beside the Scheduled Start date). A new Component Detail will be displayed. Enter the date the new provider became responsible for providing the service in both the Scheduled and Actual Start date fields.



This screenshot shows the 'IEP COMPONENT DETAIL' form after a provider change. The fields are:

- \* Scheduled Start: 02/09/2003 (with a Clone button)
- Actual Start: 01/30/2003
- Actual End: (empty)
- Delay Reason: (dropdown menu)
- \* Svc. School: Doyle Elementary--0087A (dropdown menu)
- Sessions: 1 (input field) Per: (dropdown menu)
- \* Provider: (dropdown menu) - A list is shown with 'Provider, Default' and 'Test, Mary'.
- Indirect Sessions: (input field) Per: (dropdown menu)
- \* Clone Reason: Original Implementation (dropdown menu)

5. Choose the student's servicing school and select the provider's name.

Clone Reason is Original Implementation when the provider is the first to provide services for the selected IEP. When changing providers, the Clone Reason is Provider Change.

6. Select SAVE.

When the report is run again, it should reflect the changes.