



# Editing Tasks

## *Training Guide*



*ProgressBook*®  
***Special Services***

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# Lesson *Objectives*

- **Editing pages within a task**
- **Completing pages and tasks**

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# Glossary

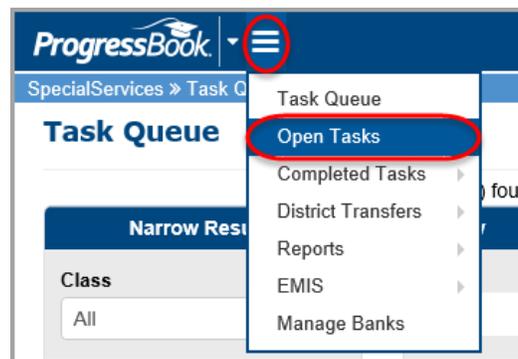
- **Task** — a set of all of the mandatory forms needed for a student to receive special services, such as an IEP, ETR, or 504 Plan
- **Form** — a required or optional document that makes up a task, such as the IEP 6 Measurable Annual Goals form or the 504 Plan 2 Statewide and District Testing form. Forms can be made up of multiple pages.
- **Page** — an instance of a form. Some task forms allow the creation of multiple pages. For example, on the IEP 6 Measurable Annual Goals form, you can add as many Goal pages as necessary.



# Access & Navigation

Once you are logged in to SpecialServices, you can access the **Open Tasks** screen in one of two ways:

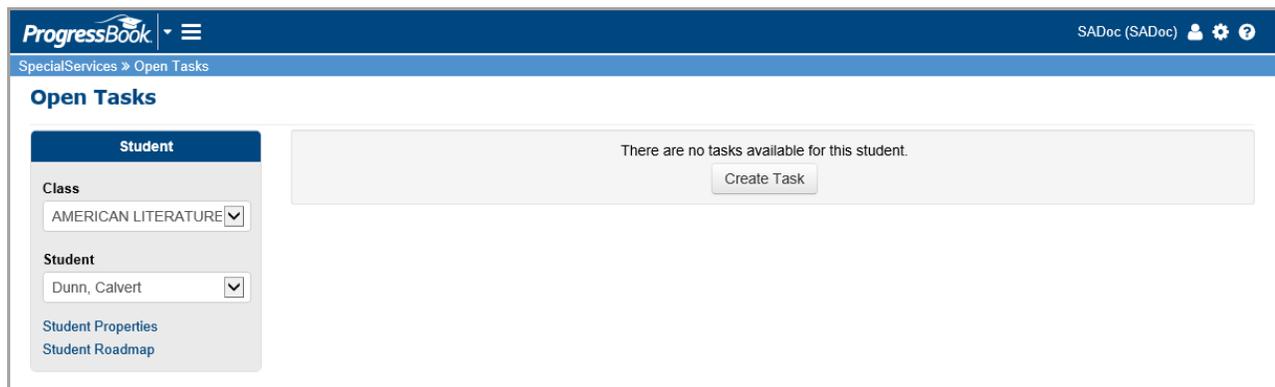
- Click  to access the main menu, and then select **Open Tasks**.



- From the **Task Queue** screen, in the **Task** column, click the task you want to view.

Narrow Results		6 task(s) found.						
Class	Priority	Student	Task	Task Type	Started	Due	Pages Complete	
All		Haynes, Sharon	2016-2017 RIEP	RIEP	2/19/2017	3/28/2017	<input type="text"/>	
		Little, Seif	2016-2017 IIEP	IIEP	2/19/2017	3/28/2017	<input type="text"/>	
		Little, Seif	2016-2017 RETR	RETR	2/19/2017	3/28/2017	<input type="text"/>	
		Palmer, Simone	2016-2017 IIEP	IIEP	2/19/2017	3/28/2017	<input type="text"/>	
		Palmer, Simone	2016-2017 RETR	RETR	2/19/2017	3/28/2017	<input type="text"/>	
		Potter, Sheryl	2016-2017 RIEP	RIEP	2/19/2017	3/28/2017	<input type="text"/>	

In both instances, the **Open Tasks** screen displays.





# Editing Pages

Once you are on the **Open Tasks** screen, click the name of the page you want to edit.

The screenshot shows the ProgressBook interface. At the top, it says 'ProgressBook' and 'SpecialServices » Open Tasks'. Below this is the 'Open Tasks' section. On the left, there are dropdown menus for 'Class' (set to 'AMERICAN LITERATURE') and 'Student' (set to 'Palmer, Simone'). There are also links for 'Student Properties' and 'Student Roadmap'. On the right, there is a list of tasks. The first task is 'IEP Cover Page', and the second is 'IEP 1 Future Planning, 2 Special Factors, 3 Profile'. The 'Cover Page' link under the first task is circled in red.

The page displays on the page edit screen. From this point, you can perform any of the following processes:

- Opening and Editing Pages
- Editing Read-Only and Editable Fields
- Editing Rich Text Fields
- Spell Check
- Electronic Signatures
- Saving Pages
- Navigating to Pages Using the Task Menu
- Copying Task Information
- Importing Contact Information
- Renaming Pages
- Locking Pages
- Unlocking Pages

**Note:** You can also create bank items from within the forms (see the ProgressBook SpecialServices Creating Banks Training Guide).

## Opening and Editing Pages

On the **Open Tasks** screen, click the name of a page to open it on the page edit screen. The page edit screen displays the page in a format that enables you to enter the appropriate information.

**Caution:** *If a page is opened by another user (indicated in the **Open By** column on the **Open Tasks** screen), you can still open it unless it is locked. However, SpecialServices only stores the changes made by the user who saves the page first. Therefore, make sure that you do not begin editing a page already opened by another user. When you edit a page, you should lock it to ensure that you can save the changes you make.*

**Note:** *Users with appropriate security privileges can open pages locked by another user (see [Unlocking Pages](#)).*

The page edit screen toolbar provides options such as changing the page name, printing the page, marking the page as complete, locking the page, and deleting the page.

ProgressBook | SADoc (SADoc)

Page Name | Cover Page | Save Name | Print Options | Actions | Delete | Close

Check Spelling | Print & Save | Save & Close | Save Form

**IEP Individualized Education Program** SADoc  
Simone Palmer

This IEP will be implemented during the regular school term unless noted in general factors.

CHILD'S INFORMATION	MEETING INFORMATION
NAME: Simone Palmer	MEETING DATE: <input type="text"/>
ID NUMBER: 4301011	MEETING TYPE: <input type="text"/>
DATE OF BIRTH: 12/17/2002	<input type="checkbox"/> INITIAL IEP
STREET: 1141 Main Ave	<input type="checkbox"/> ANNUAL REVIEW
CITY: SADoc	<input type="checkbox"/> REVIEW OTHER THAN ANNUAL REVIEW
DISTRICT OF RESIDENCE: 300430 SADoc	<input type="checkbox"/> AMENDMENT
COUNTY OF RESIDENCE:	<input type="checkbox"/> OTHER
DISTRICT OF SERVICE: 300430 SADoc	

SADoc (SADoc)

Print Options | Actions | Delete | Close

Include Page Number  
 Include Watermark

SADoc (SADoc)

Print Options | Actions | Delete | Close

Complete  
 Locked



**Note:** On the Testing form, in the **Area** column, if you select one or more End of Course assessments from the available drop-down lists, a yellow box displays at the bottom of the form. In this yellow box, you may select the corresponding check box(es) for each End of Course assessment to excuse the student from the assessment's graduation requirements.

**Note:** The yellow box does not display when printed since ODE has not updated their official Testing form to include this information.

**12 STATEWIDE AND DISTRICT WIDE TESTING** Check Spelling Print & Save Save & Close Save Form

For each subject tested in the child's grade, choose the method of assessment below. If "With Accommodations" is chosen for any subject, provide a description of the Accommodations for each subject in the right column. Alternate Assessment, if chosen, must apply to all tests taken.

Will the child participate in classroom, district wide and state wide assessments with accommodations?  YES  NO

AREA	GRADE	DATE OF TEST	CHILD WILL BE TESTED:	DETAIL OF ACCOMMODATIONS
READING HS Eng Lang Arts I	12	Feb 2016	<input type="checkbox"/> Without Accommodations <input checked="" type="checkbox"/> With Accommodations <input type="checkbox"/> Modified Assessment <input type="checkbox"/> Alternate Assessment	breaks during testing, cues to stay on task, Extended time, small group
WRITING 10th OGT	12	March 2016	<input type="checkbox"/> Without Accommodations <input checked="" type="checkbox"/> With Accommodations <input type="checkbox"/> Modified Assessment <input type="checkbox"/> Alternate Assessment	breaks during testing, cues to stay on task, Extended time, small group
MATH 10th OGT	12	April 2016	<input type="checkbox"/> Without Accommodations <input checked="" type="checkbox"/> With Accommodations <input type="checkbox"/> Modified Assessment <input type="checkbox"/> Alternate Assessment	breaks during testing, cues to stay on task, Extended time, small group
SCIENCE 10th OGT	12	March 2016	<input type="checkbox"/> Without Accommodations <input checked="" type="checkbox"/> With Accommodations <input type="checkbox"/> Modified Assessment <input type="checkbox"/> Alternate Assessment	breaks during testing, cues to stay on task, Extended time, small group
SOCIAL STUDIES 10th OGT	12	March 2016	<input type="checkbox"/> Without Accommodations <input checked="" type="checkbox"/> With Accommodations <input type="checkbox"/> Modified Assessment <input type="checkbox"/> Alternate Assessment	breaks during testing, cues to stay on task, Extended time, small group
OTHER			<input checked="" type="checkbox"/> Without Accommodations <input type="checkbox"/> With Accommodations <input type="checkbox"/> Modified Assessment <input type="checkbox"/> Alternate Assessment	

The child is excused from the consequences of not passing the End of Course graduation requirement for the following courses:  
 HS Eng Lang Arts I  
This section will not display when printing

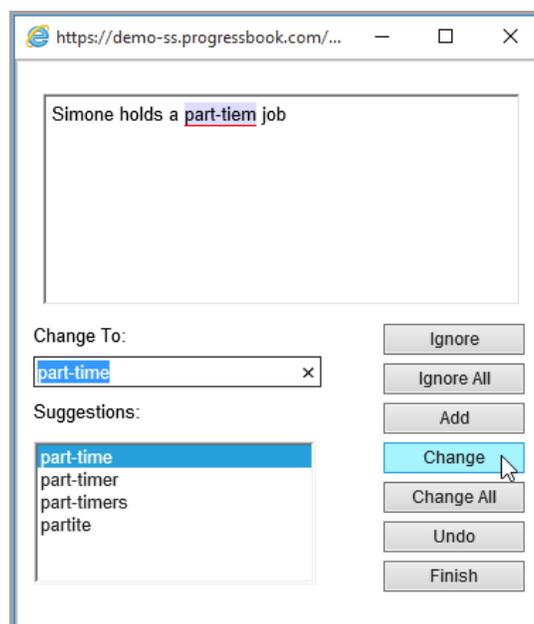
## Spell Check

Click **Check Spelling**, and a window that checks the spelling in every text box on the form displays. You have the option to select the following from within the window:

- Ignore
- Ignore All
- Add
- Change
- Change All
- Undo
- Finish

**Note:** For Internet Explorer and Firefox users, **Change All** corrects all occurrences of the misspelled word on the form, and **Ignore All** ignores all occurrences of the misspelled word on the form.

For Safari users, **Change All** corrects all occurrences of the misspelled word in the text box, and **Ignore All** ignores all occurrences of the misspelled word in the text box.

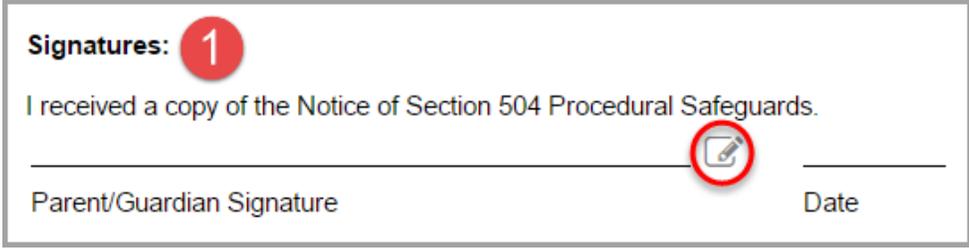


## Electronic Signatures

If your administrator has enabled electronic signatures, you can sign certain forms using your mouse, tablet pen, or finger.

1. In the signature field of the form you are signing, click .

The **Signature Agreement** window displays.



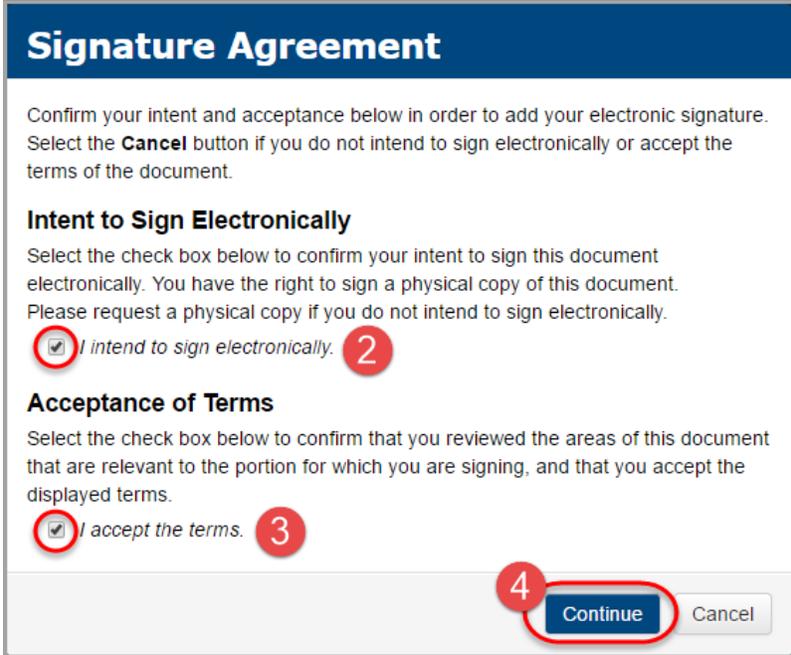
**Signatures:** 1

I received a copy of the Notice of Section 504 Procedural Safeguards.

\_\_\_\_\_  \_\_\_\_\_

Parent/Guardian Signature Date

2. On the **Signature Agreement** window, select the **I intend to sign electronically.** check box.
3. Next, select the **I accept the terms.** check box.
4. Click **Continue.**



**Signature Agreement**

Confirm your intent and acceptance below in order to add your electronic signature. Select the **Cancel** button if you do not intend to sign electronically or accept the terms of the document.

**Intent to Sign Electronically**

Select the check box below to confirm your intent to sign this document electronically. You have the right to sign a physical copy of this document. Please request a physical copy if you do not intend to sign electronically.

I intend to sign electronically. 2

**Acceptance of Terms**

Select the check box below to confirm that you reviewed the areas of this document that are relevant to the portion for which you are signing, and that you accept the displayed terms.

I accept the terms. 3

4 **Continue** Cancel

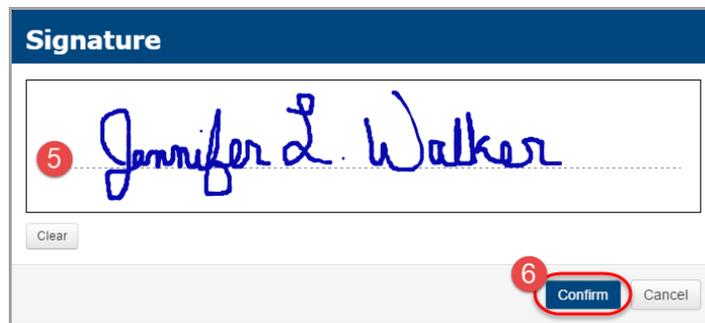
**Note:** Be sure to read all of the terms and conditions before selecting the check boxes.

The **Signature** window displays.



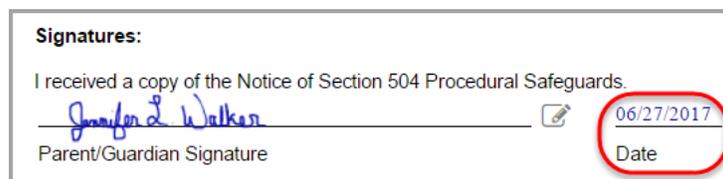
The image shows a window titled "Signature" with a large text area containing a horizontal dotted line. Below the text area is a "Clear" button. At the bottom right of the window are "Confirm" and "Cancel" buttons.

5. On the **Signature** window, sign your name on the dotted line. If necessary, click **Clear** to delete your signature and re-sign your name.
6. Click **Confirm**.



The image shows the "Signature" window with the handwritten signature "Jennifer L. Walker" on the dotted line. A red circle with the number "5" is next to the signature. Below the signature is a "Clear" button. At the bottom right, the "Confirm" button is circled in red with a red circle containing the number "6".

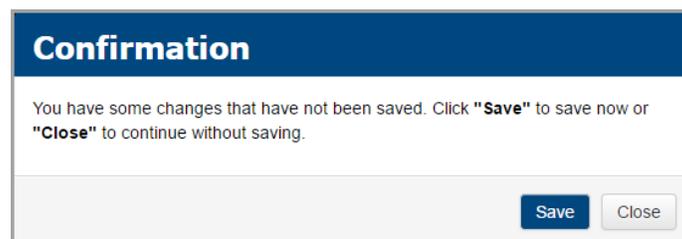
**Note:** If a **Date** field follows the signature field on the form, it automatically displays the date you signed the form.



The image shows a form section titled "Signatures:". Below the title is the text "I received a copy of the Notice of Section 504 Procedural Safeguards." followed by a signature line with the handwritten signature "Jennifer L. Walker" and a "Date" field containing "06/27/2017". The "Date" field is circled in red.

**Note:** If you need to clear/re-sign your name after you have clicked **Confirm**, click  and repeat [step 1](#) through [step 4](#).

**Note:** If you sign a form and then navigate away from the page before saving it, a confirmation window displays asking if you want to save your signature.



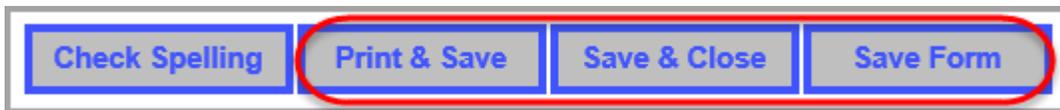
The image shows a window titled "Confirmation" with the text: "You have some changes that have not been saved. Click **Save** to save now or **Close** to continue without saving." At the bottom right are "Save" and "Close" buttons.

## Saving Pages

You can choose from the following options when saving changes you have made to a page on the page edit screen.

- Click **Print & Save** to print the page and save the changes. The form displays in another tab or window (depending on your browser) as a PDF from which you can print the page.
- Click **Save & Close** to save the page and close the page edit screen. You are returned to the **Open Tasks** screen.
- Click **Save Form** to save changes and continue to edit the page.

***Note:** The buttons remain stationary at the top of the screen as you scroll down the page.*



## System Time Out

If you click one of the save buttons and the system prompts you to sign in, SpecialServices has timed out due to a period of inactivity exceeding the time limit defined by your district. Though your changes are saved when this occurs, you should always save your changes throughout the editing process.

## Navigating to Other Pages

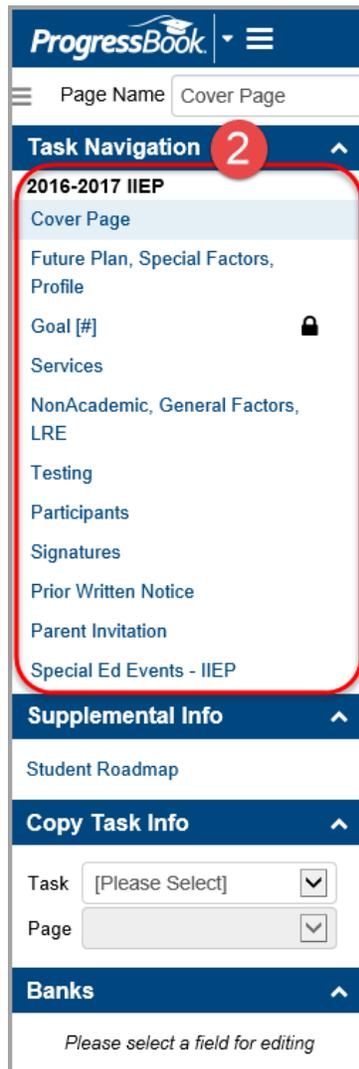
When you are editing a page, you can easily navigate to other pages within the same task without returning to the **Open Tasks** screen.

1. On the page edit screen toolbar, click  to expand the **Task Navigation** menu.



2. In the **Task Navigation** menu, click the name of the page you want to open.

**Note:** You cannot open pages that are locked (denoted by a ) unless you have the property security privileges.



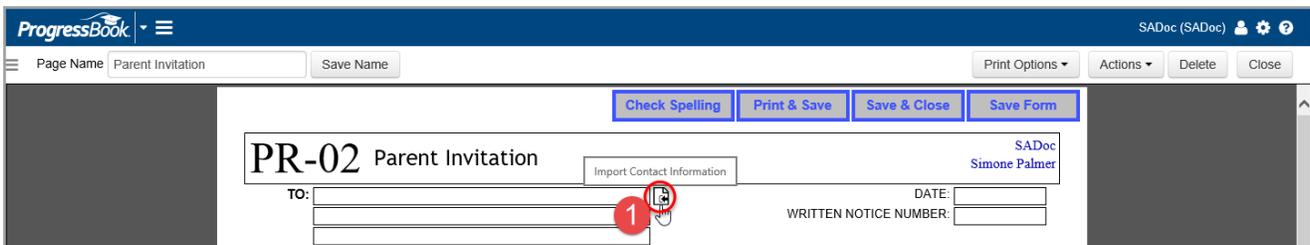
## Copying Task Information

If this editing feature is enabled by your administrator, a **Copy Task Info** area displays in the **Task Navigation** menu. See the *ProgressBook Copy Task Information Training Guide* for more information on how to complete this process.

## Importing Contact Information

When editing the Parent Invitation form or General Invitation form, you can import a student's non-professional contacts from the **Student Properties** window (see the *ProgressBook Setting Student Properties Training Guide*).

1. With the form open on the page edit screen, to the right of the **TO** field, click .

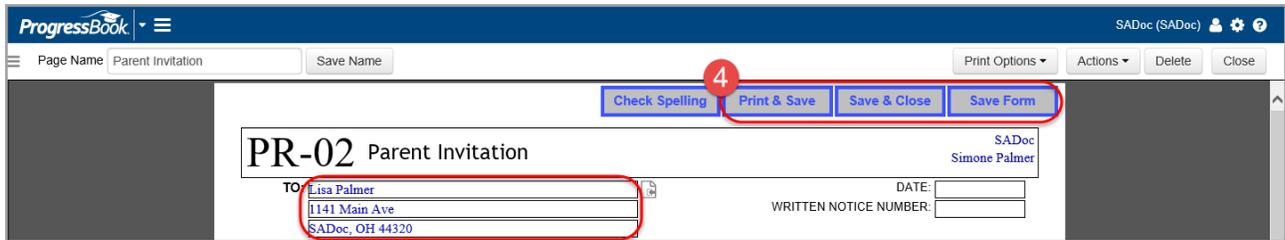


2. On the **Import Contact Information** window, select the contact that you want to display on the form.
3. Click **Import**.



The selected contact's information displays on the form.

4. Save the page using one of the save options specified in [Saving Pages](#).

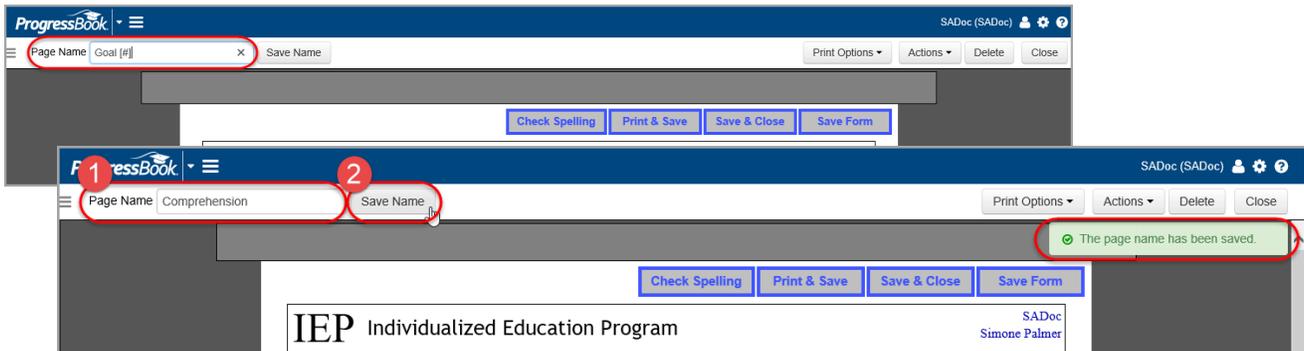


## Renaming Pages

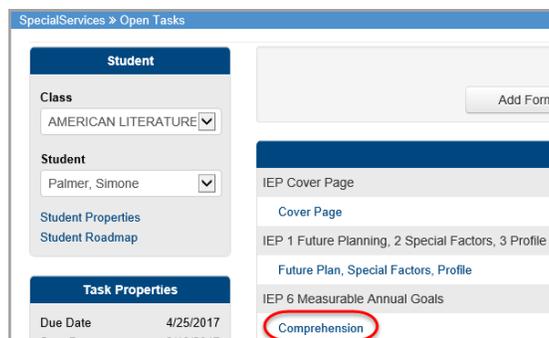
When you create a new page, the system assigns a name by default. You can change the name of the page to something descriptive and easily recognizable to you and anyone else accessing the task.

1. At the top of the page edit screen, in the **Page Name** field, modify the current name as you desire.
2. Click **Save Name**.

A confirmation message briefly displays.



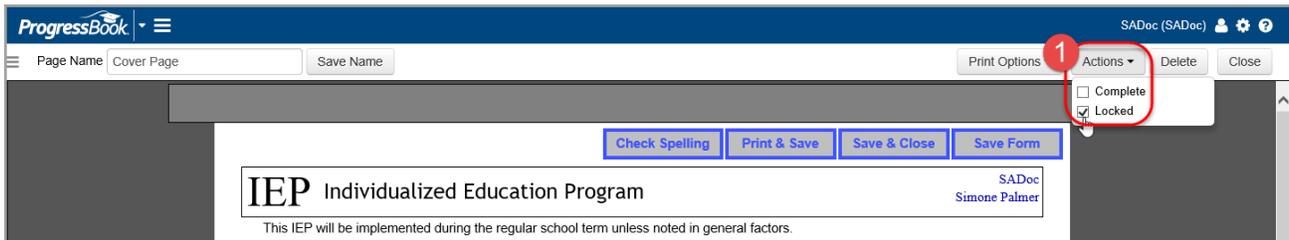
The new name displays as the link for the page on the **Open Tasks** screen.



## Locking Pages

You can lock a page you are working on to prevent other users from opening, viewing, editing, printing, or completing a page. You can only access a locked page if you are the user who locked the page or if you have the appropriate security privileges.

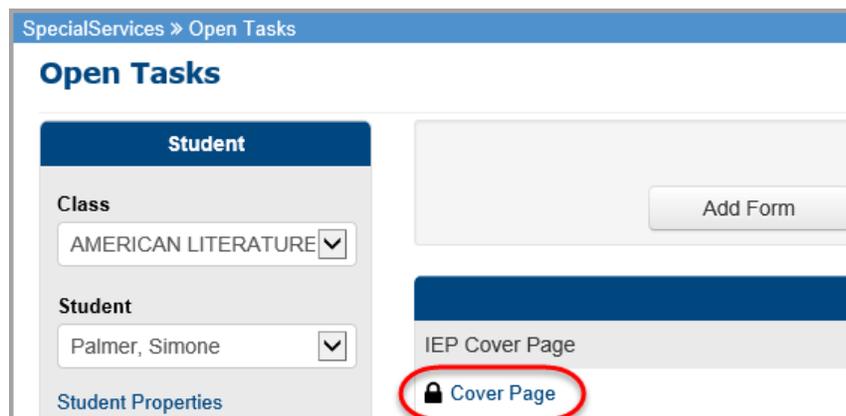
1. With the page open on the page edit screen, click **Actions**, then select the **Locked** check box.



2. If you have no additional edits to make to the page, click **Close**.



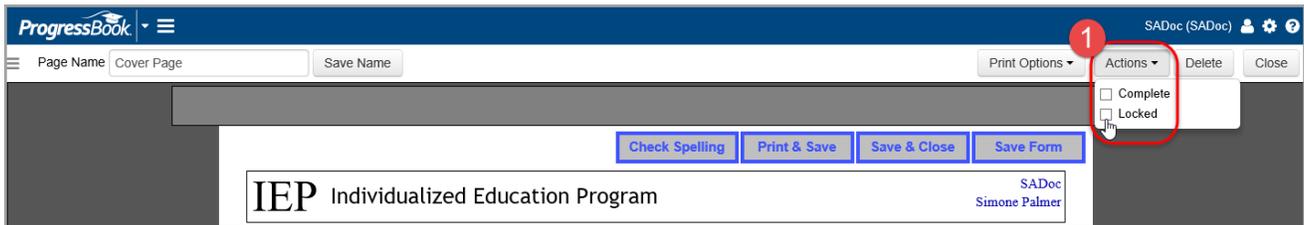
On the **Open Tasks** screen,  displays next to the page name, indicating the page is now locked. Any attachments associated with the page are also locked. If you want to unlock a page, see [Unlocking Pages](#).



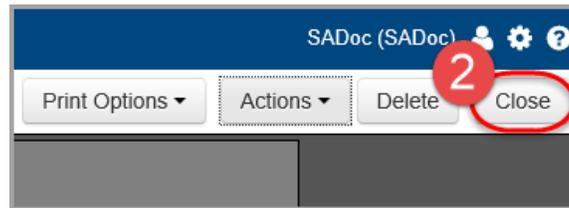
## Unlocking Pages

Only the user who locked the page or users with Confidential Override security privileges can unlock a page. Additionally, all pages must be unlocked before you can complete a task unless you are the user who locked the page or if you have Confidential Override security privileges.

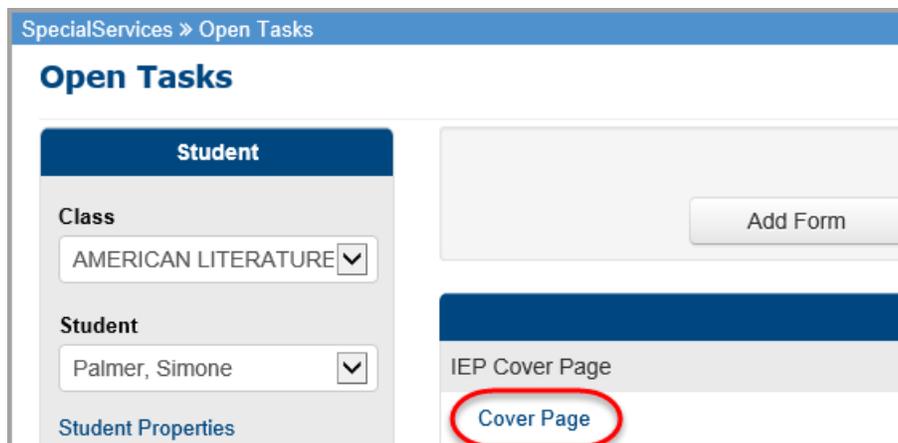
1. With the form open on the page edit screen, click **Actions**, then de-select the **Locked** check box.



2. If you have no additional edits to make to the page, click **Close**.



On the **Open Tasks** screen,  no longer displays next to the page name. Users can now open and edit the page or complete the task. If you want to lock the page, see [Locking Pages](#).





# Completing Pages

As you finish editing pages in a task, you can mark them as complete.

**Note:** Attachments are an extension of the page to which they are attached, so the option to complete a page is only available for the original page.

You can complete a page using either of the following methods:

- On the **Open Tasks** screen, in the row of the page you want to mark as complete, select the **Completed** check box. To mark all pages as complete, select the **Completed** check box in the column header.

The screenshot shows the 'Open Tasks' interface in ProgressBook. The task is '2016-2017 IIEP'. The table below lists various pages and their completion status.

Task	Created By	Open By	Print	Completed
IEP Cover Page				<input checked="" type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile	Butler, Catherine		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input checked="" type="checkbox"/>
IEP 5 PostSecondary Transition Services (Additional)				<input type="checkbox"/>
Transition Services	Masters, Paul		<input type="checkbox"/>	<input type="checkbox"/>
IEP 6 Measurable Annual Goals				<input checked="" type="checkbox"/>
Goal [#]	Masters, Paul		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Goal [#] - Page [#]				
PDF 1				

- With a page open on the page edit screen, click **Actions**, and then select the **Complete** check box.

The screenshot shows the page edit screen for 'Cover Page'. The 'Actions' dropdown menu is open, showing options: Complete (checked), Locked, and Unlocked. The page content includes the title 'IEP Individualized Education Program' and fields for 'CHILD'S INFORMATION' (NAME: Simone Palmer) and 'MEETING INFORMATION' (MEETING DATE:).



# Completing Tasks

Once all of the pages in a task are marked as complete, if you are assigned the appropriate security role, you can complete the task and merge the pages into a read-only form set that is viewable from the **Completed Tasks** screen. Completing a task is important for the following reasons:

- You cannot edit a task once it is complete
- Users with read-only security privileges can view the forms within the task
- You or other users can start the next cycle of forms for the task (you cannot open a new task if a task of the same type is currently open)
- You or other users can generate data using the EMIS Tools (the system only extracts EMIS data from complete tasks)
- You or other users can transfer a student's forms to another district (the **District Transfers** function only transfers forms from completed tasks)

You cannot complete a task if any of the pages are locked by another user. If you are the user who locked the page, you can complete the task. The system recognizes that and automatically unlocks the page during the complete task process.

If you are not the user who locked the form, but you have the appropriate security privileges, you can also complete the task without unlocking any pages; however, the system warns you that a page is locked. It is recommended that you verify that the locked page is complete before completing the task.

If you complete a task and later realize you need to make a change to it, you will have to create a new task from the existing task (see the *ProgressBook SpecialServices Copy Task Information Training Guide*)

1. On the **Open Tasks** screen, in the **Student** drop-down list, select the student for whom you want to complete a task.
2. In the **Task** drop-down list, select the task you want to complete.
3. Ensure that all of the required pages for the task are marked as complete and no pages are currently locked by another user.
  - To mark a page as complete, see [Completing Pages](#)
  - To unlock a page, see [Unlocking Pages](#)

**Note:** When all of the required forms are marked as complete, the **Complete Task** button is active.
4. Click **Complete Task**.

**Open Tasks**

Student: Palmer, Simone

Task: 2016-2017 IIEP

Buttons: Add Form, Upload Page, Verify EMIS, Print, Complete Task

	Created By	Open By	Print	Completed
IEP Cover Page				<input checked="" type="checkbox"/>
Cover Page	Butler, Catherine		<input type="checkbox"/>	<input checked="" type="checkbox"/>
IEP 1 Future Planning, 2 Special Factors, 3 Profile				<input checked="" type="checkbox"/>
Future Plan, Special Factors, Profile	Butler, Catherine		<input type="checkbox"/>	<input checked="" type="checkbox"/>
IEP 5 PostSecondary Transition Services (Additional)				<input checked="" type="checkbox"/>
Transition Services	Masters, Paul		<input type="checkbox"/>	<input checked="" type="checkbox"/>

The task displays in the list of completed tasks for the student on the **View Completed Tasks** screen.

**View Completed Tasks**

Student: Palmer, Simone

Completed Tasks	Task Type	Completed Date	Event Date	Include In Emis	CFE	Action
2016 - Grade Ten						
2016-2017 IIEP	IIEP	4/5/2017		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
2016-2017 PR (IEP)	IEPPR	3/3/2017			<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
2015 - Grade Nine						
2015-2016 Invite	INV	3/3/2016			<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
2015-2016 RIEP	RIEP	3/3/2016	10/24/2011	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
2015-2016 PR (IEP)	IEPPR	3/3/2016			<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
2014 - Grade Eight						

**Note:** On the **Task Queue** screen, in the **Pages Complete** column, the shading represents the amount of pages complete for that task. If you hover your cursor over the shading, the number of completed pages out of the total pages for the task displays. Once all of the pages are marked as complete, you can complete the task, which removes it from the **Task Queue** screen (see [Completing Tasks](#)).

ProgressBook SpecialServices » Task Queue SADoc (SADoc)

### Task Queue

5 task(s) found.

Narrow Results		Priority	Student	Task	Task Type	Started	Due	Pages Complete	Delete
School	SADoc High School		Palmer, Simone	2016-2017 IIEP	IIEP	3/26/2017	5/2/2017	3 of 7 pages complete	
Student (Last, First MI)	p		Palmer, Simone	2016-2017 RETR	RETR	3/26/2017	5/2/2017		
			Payne, Soraya	2016-2017 IIEP	IIEP	3/26/2017	5/2/2017		
			Payne, Soraya	2016-2017 RETR	RETR	3/26/2017	5/2/2017		
			Potter, Sheryl	2016-2017 RIEP	RIEP	3/26/2017	5/2/2017		