



# Overview *Guide*



*ProgressBook*®

*Special Services*

Software Answers, LLC  
6770 Snowville Rd., Suite 200  
Brecksville, Ohio 44141

[www.progressbook.com](http://www.progressbook.com)

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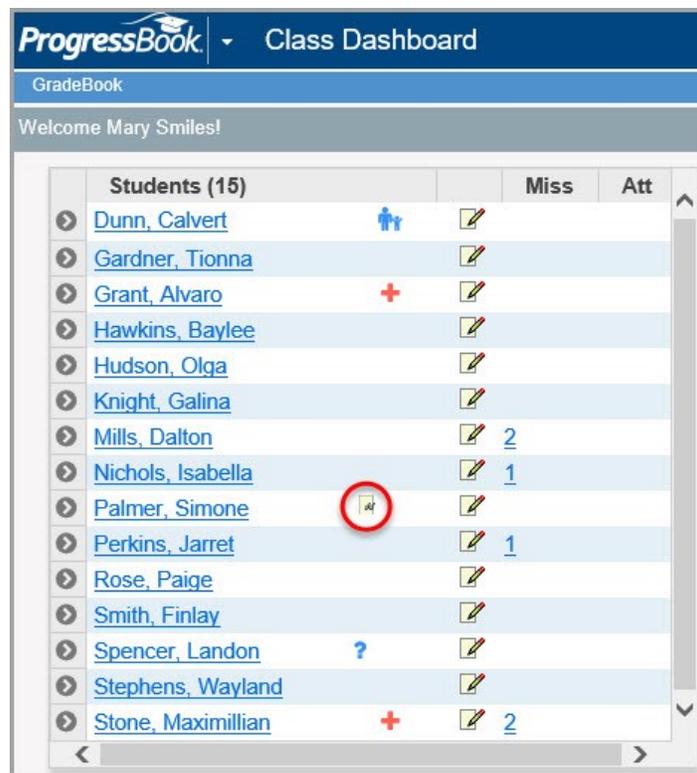
# Access & Navigation

There are three ways you can access SpecialServices: from the GradeBook **Class Dashboard**, from another ProgressBook application if you are already logged in, or from the CentralAdmin sign-in screen via a SpecialServices link provided by your district.

## Access via GradeBook

On the **Class Dashboard**, click  in the row of the student's name.

**Note:** This icon only displays for students with completed tasks in SpecialServices, and displays for 13 months after the last task was completed.

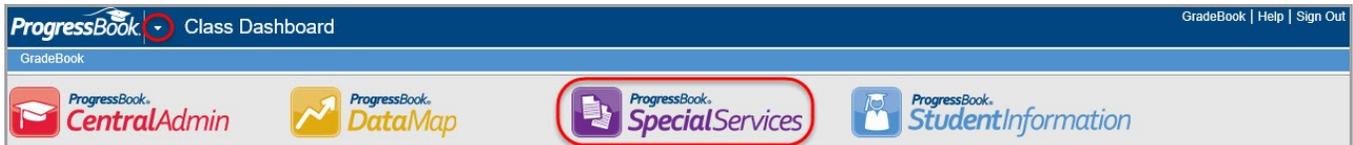


The screenshot shows the ProgressBook interface. At the top, it says "ProgressBook" and "Class Dashboard". Below that, it says "GradeBook" and "Welcome Mary Smiles!". The main content is a table with columns for "Students (15)", "Miss", and "Att". The table lists 15 students with their names and corresponding icons. The icon for "Palmer, Simone" is circled in red.

Students (15)	Miss	Att
Dunn, Calvert		
Gardner, Tionna		
Grant, Alvaro		
Hawkins, Baylee		
Hudson, Olga		
Knight, Galina		
Mills, Dalton		2
Nichols, Isabella		1
Palmer, Simone		
Perkins, Jarret		1
Rose, Paige		
Smith, Finlay		
Spencer, Landon		
Stephens, Wayland		
Stone, Maximillian		2

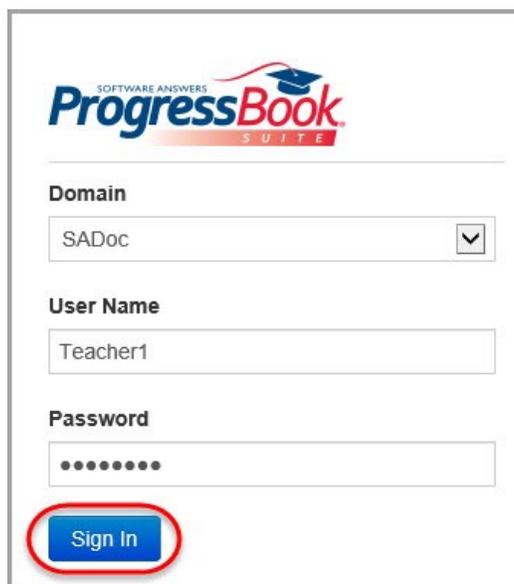
## Access via Quick Launch

If you are already signed in to another ProgressBook application, you can access SpecialServices by clicking the application quick launch icon beside the ProgressBook logo in the banner. When you click SpecialServices, the application opens in a new window or tab, depending on your browser settings.



## Access via CentralAdmin

If you access the application via a SpecialServices URL provided by your district, you are directed to the CentralAdmin login screen where you log in with your **Domain**, **User Name**, and **Password**.

A screenshot of the ProgressBook CentralAdmin login screen. At the top is the ProgressBook logo with 'SOFTWARE ANSWERS' and 'SUITE' text. Below the logo are three input fields: 'Domain' with a dropdown menu showing 'SADoc', 'User Name' with the text 'Teacher1', and 'Password' with a masked field of dots. At the bottom is a blue 'Sign In' button, which is circled in red.

Your default home screen displays, which depends on your security privileges.

(Access via CentralAdmin cont.)

- If you have editing and/or administrative privileges, the **Task Queue** screen displays as your default home screen.

ProgressBook SpecialServices » Task Queue

### Task Queue

4 task(s) found.

Priority	Student	Task	Task Type	Started	Due	Pages Complete	Delete
!	Adams, Jake	2015-2016 IIEP	IIEP	8/24/2015	5/27/2016	<div style="width: 100%;"></div>	
	Addis, Thomas	2015-2016 IIEP	IIEP	8/24/2015	5/30/2016	<div style="width: 100%;"></div>	
	Brown, Alex	2015-2016 AIEP	AIEP	8/24/2015	6/3/2016	<div style="width: 100%;"></div>	
	Grenda, Holly	2015-2016 RIEP	RIEP	8/24/2015	6/3/2016	<div style="width: 100%;"></div>	

**Narrow Results**

Class: All

Student (Last, First MI):

Priority:  All  Priority  Non-priority

Pages Complete:  Any  All  Partial  None

Due Date:  Next 30 days  Next 90 days  Expired  Any  Custom

Task Group:  All  Other  IEP  ETR  SP  WEP  PR

Only tasks I have worked on

- If you have read-only privileges, the **View Completed Tasks** screen displays, letting you open and review the completed tasks for the students to whom you have access.

ProgressBook SpecialServices » Completed Tasks » View Completed Tasks

### View Completed Tasks

Student: AMERICAN LITERATURE

Student: Palmer, Simone

Student Roadmap

Student	Completed Tasks	Task Type	Completed Date	Event Date	CFE
2016 - Grade Ten	2016-2017 PR (IEP)	IEPPR	12/30/2016		✓
	2015 - Grade Nine				
2015 - Grade Nine	2015-2016 Invite	INV	12/30/2015		✓
	2015-2016 RIEP	RIEP	12/30/2015	10/24/2011	✓
	2015-2016 PR (IEP)	IEPPR	12/30/2015		✓
2014 - Grade Eight					
2014 - Grade Eight	2014-2015 RIEP	RIEP	12/30/2014	10/24/2011	
	2014-2015 Invite	INV	12/30/2014		
2013 - Grade Seven					
2013 - Grade Seven	2013-2014 RIEP	RIEP	12/30/2013	10/24/2011	
	2013-2014 PR (IEP)	IEPPR	12/30/2013		

## Signing Out of SpecialServices

You should sign out of SpecialServices if you plan to leave your computer unattended for any length of time.

To sign out, click  on the banner, then click **Sign Out**.



**Caution:** *ProgressBook automatically signs you out after a certain amount of inactive time, which is set up by your system administrator, so be sure to save your form data frequently.*



# Special Education Process Flow

SpecialServices is designed to follow federal and state mandated time lines and procedures. To accommodate these requirements, SpecialServices uses tasks that correspond with special education events and contain required and additional forms to complete the task.

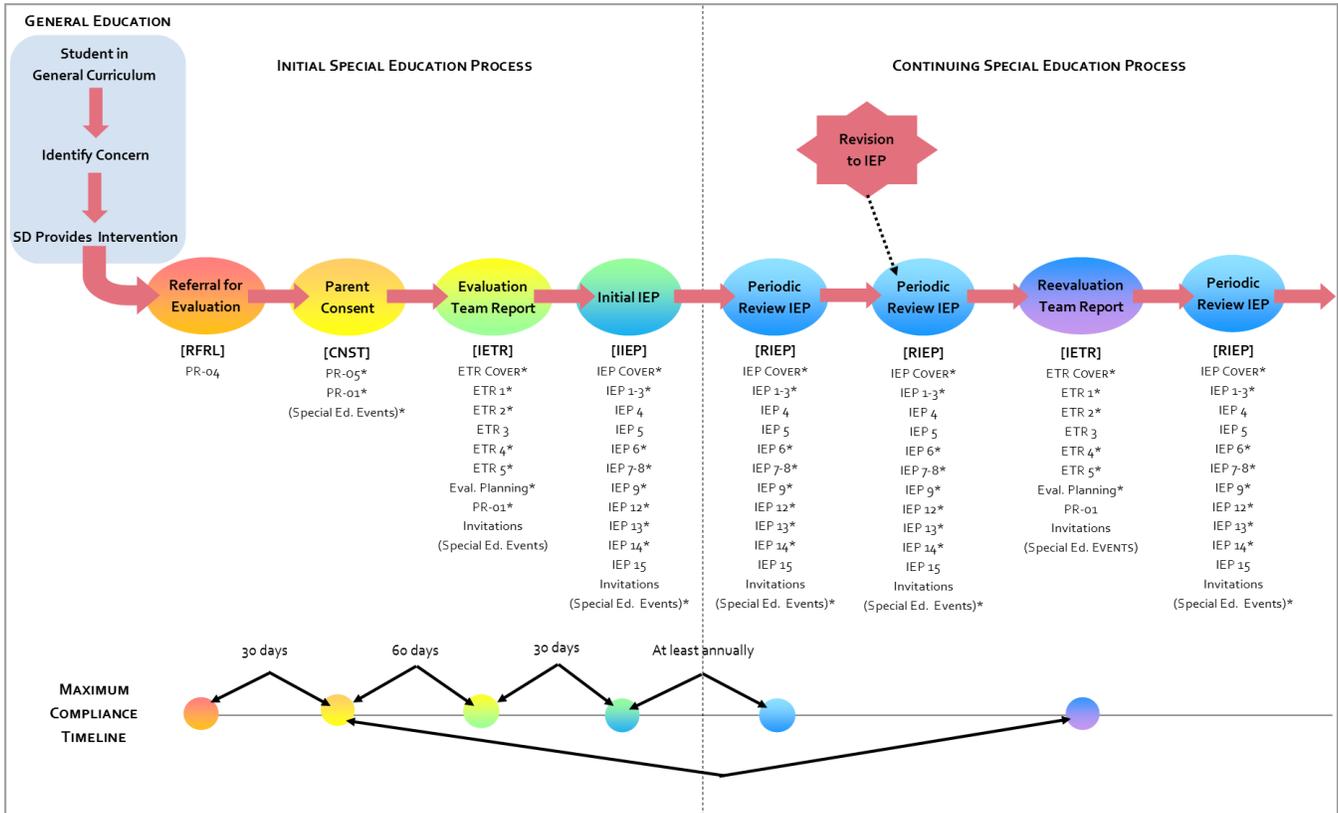
In SpecialServices, an open task is a task in which the members of a special education team are currently editing the forms. Only users with the appropriate security privileges can view or edit open tasks.

Once a task is marked as **Completed**, a member of the team handling the task must complete it to allow users with view-only access to view the effective version of the forms. You might complete a task to keep a historical copy of a draft form set, such as an IEP, or only when the effective version of the form set is implemented.

The last component of the special education process that SpecialServices provides is EMIS reporting. Certain tasks, such as an initial IEP or review ETR, are reported to the state to ensure compliance with the federal and state mandated standards and ensure funding of special education programs for the district. The EMIS Extract—as well as the EMIS reporting tools—only select data from completed tasks.

*(Special Education Process Flow cont.)*

This illustration shows the special education process flow, the corresponding tasks provided by SpecialServices, and the forms associated with each task.





# Task Queue

If you have the appropriate security privileges to create and modify open tasks, the **Task Queue** screen displays when you access SpecialServices. This screen lists the first 50 open tasks in ascending order based on the **Due** date. The tasks for students that display are based on the default **Narrow Results** area view.

ProgressBook SAADoc (SAADoc) [User] [Settings] [Help]

SpecialServices > Task Queue

### Task Queue

6 task(s) found.

**Narrow Results**

**Class**  
All

**Student (Last, First MI)**

**Priority**  
 All  Priority  
 Non-priority

**Pages Complete**  
 Any  All  
 Partial  None

**Due Date**  
 Next 30 days  Next 90 days  
 Expired  Any  
 Custom

**Task Group**  
 All  Other  
 IEP  ETR  
 SP  WEP  
 PR

Only tasks I have worked on

Priority	Student	Task	Task Type	Started	Due ^	Pages Complete
	Haynes, Sharon	2016-2017 RIEP	RIEP	1/22/2017	2/28/2017	<input type="text"/>
	Little, Seif	2016-2017 IIEP	IIEP	1/22/2017	2/28/2017	<input type="text"/>
	Little, Seif	2016-2017 RETR	RETR	1/22/2017	2/28/2017	<input type="text"/>
	Palmer, Simone	2016-2017 IIEP	IIEP	1/22/2017	2/28/2017	<input type="text"/>
	Palmer, Simone	2016-2017 RETR	RETR	1/22/2017	2/28/2017	<input type="text"/>
	Potter, Sheryl	2016-2017 RIEP	RIEP	1/22/2017	2/28/2017	<input type="text"/>



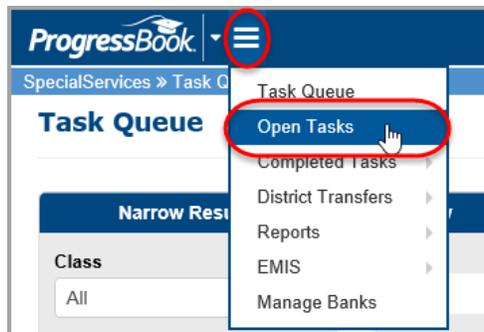
# Open Tasks

The **Open Tasks** screen is the main work area in SpecialServices where you can create new and view existing tasks for a particular student.

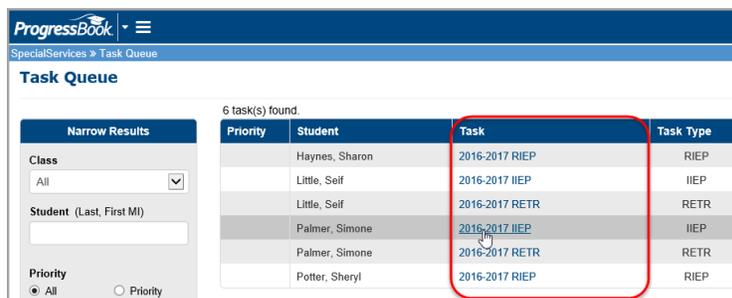
**Note:** Only users with editing and/or administrative privileges can access this screen.

The **Open Tasks** screen can be accessed in two ways:

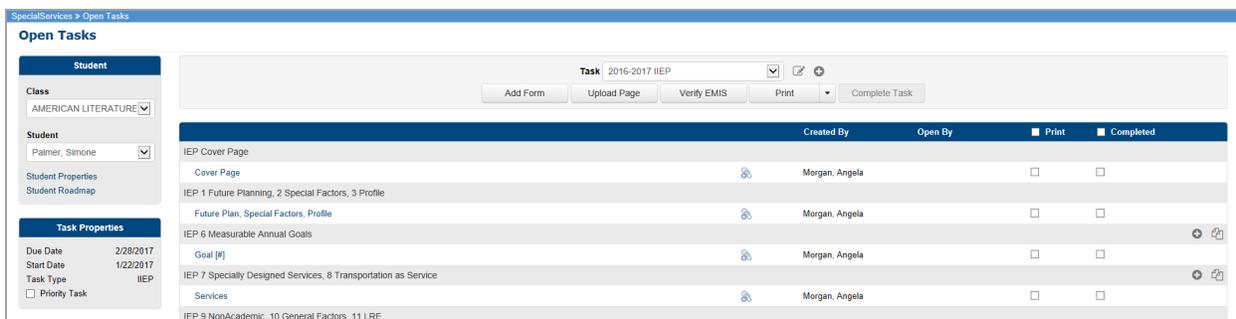
- On the banner, click  and select **Open Tasks** from the main drop-down list.



- On the **Task Queue** screen, in the **Task** column, click the task you want to



The **Open Tasks** screen displays.





# Completed Tasks

A list of completed tasks for a selected student

The screenshot shows the ProgressBook interface. The top navigation bar includes the ProgressBook logo and a hamburger menu icon. Below the navigation bar, the breadcrumb trail reads 'SpecialServices » Task Queue'. The main heading is 'Task Queue'. On the left, there are filters for 'Class' (set to 'All'), 'Student' (Last, First MI), and 'Priority' (set to 'All'). A dropdown menu is open from the hamburger menu, with 'Completed Tasks' highlighted. A sub-menu is open from 'Completed Tasks', showing options: 'View Completed Tasks', 'IEP Summary', and 'View Archived Forms'. Below the menu, a table lists student names: Little, Seif; Little, Seif; Palmer, Simone; Palmer, Simone; and Potter, Sheryl.

A summary of the last completed IEP task including goals, objectives, services, etc.

A list of forms created in Classic view or a version of SpecialServices prior to 9.1.0



# District Transfers

Transmit the tasks for a student who has transferred from your district to another that also uses ProgressBook

The screenshot shows the ProgressBook interface. At the top left, the 'ProgressBook' logo is visible. Below it, the breadcrumb 'SpecialServices » Task Queue' is shown. The main heading is 'Task Queue'. On the left, there are filters for 'School' (set to 'All') and 'Student' (Last, First Name). A navigation menu is open, listing options: Task Queue, Open Tasks, Completed Tasks, District Transfers (highlighted with a red circle), Reports, EMIS, Manage Banks, and Admin. The 'District Transfers' sub-menu is also open, listing: Transfer Student, Import Forms, and Transfer Status & Reports. A red box highlights the 'District Transfers' menu and its sub-items. A red arrow points from the 'Import Forms' option to the right, towards a text box. Another red arrow points from the 'Transfer Student' option upwards to a text box. A third red arrow points from the 'Transfer Status & Reports' option downwards to a text box.

Import tasks and store them as part of the student's information

View the transfer history of the student task imported into or transferred out of your district.



# Reports

A variety of reports are available from this screen if they are enabled for your district and if you have the appropriate user privileges.

ProgressBook

SpecialServices » Report

## Report Builder

**Core Reports**

- Student Demographic**  
Provides numerous demographic information
- Open Tasks**  
Displays existing open tasks for one or more task types for students i...

- Task Queue
- Open Tasks
- Completed Tasks
- District Transfers
- Reports**
- EMIS
- Manage Banks
- Admin

- Report Builder
- Class Print
- Print Blank Forms

Run

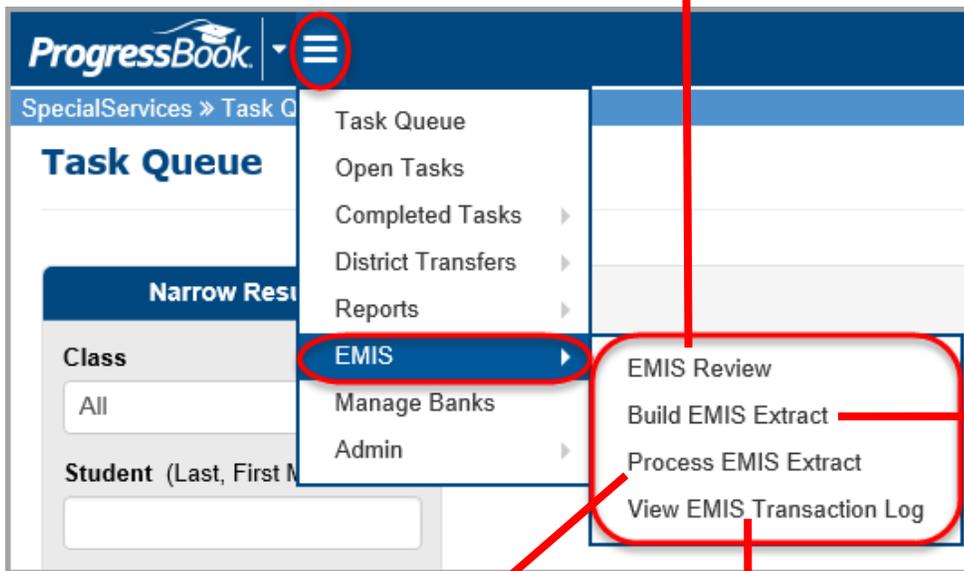
You can print progress reports or IEP summaries for one or more students.

You can print blank versions of the forms to use offline.



# EMIS

Lists all of the students whose information is available for reporting to EMIS and lets you access the EMIS Data Collection Form after a task has been completed.



Build an EMIS Extract of all the students in the entire district, only the students in an individual building, or a specific student.

After you build the EMIS Extract, view the files here and/or process the EMIS extract.

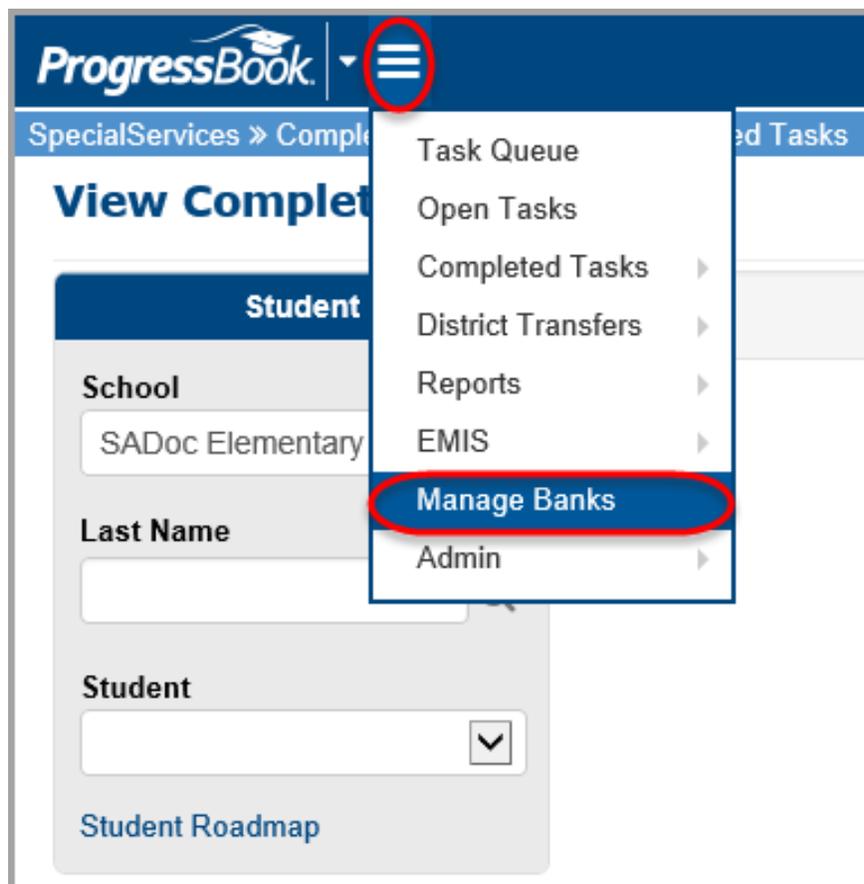
View a log of EMIS extract transactions.



# Manage Banks

You can set up and maintain your own bank of items (such as phrases, lists, tables, graphics, etc.) that you plan to reuse on forms. You also have the option to add text from one or more state standards into the bank item. See the *SpecialServices Manage Banks Training Guide* for more information on how to create, edit, and delete bank items.

Users with the Administrative privilege assigned to their role can set up and maintain banks of commonly used phrases and make these banks available to users in the district to reuse on their forms.



(Manage Banks cont.)

## Creating Bank Items from Within a Form

The screenshot shows the ProgressBook interface for an IEP form. The left sidebar has a 'Banks' menu with 'My Banks' and 'District Banks' options. The 'My Banks' section is currently empty, and the 'Add New Bank' button is highlighted with a red circle. The main form area displays the IEP title, a 'MEASURABLE ANNUAL GOALS' section with a 'NUMBER' field set to '1' and an 'AREA' field set to 'Writing', and a 'PRESENT LEVEL OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE' section containing a paragraph of text. Below these are fields for 'MEASURABLE ANNUAL GOAL' and 'METHOD(S)'.

## Creating Bank Items from Outside a Form

The screenshot shows the ProgressBook interface with the 'My Banks' list on the left sidebar. The list contains three items: 'Reading Goal - 4th Grade Level', 'Reading Goal - 5th Grade Level', and 'Reading Goal - 6th Grade Level'. The 'Add New Bank' button is highlighted with a red circle. The main form area is partially visible, showing the IEP title and the 'MEASURABLE ANNUAL GOALS' section.

## Inserting Bank Items Into Forms

The screenshot shows the ProgressBook interface with the 'My Banks' list on the left sidebar. The list contains three items: 'Reading Goal - 4th Grade Level', 'Reading Goal - 5th Grade Level', and 'Reading Goal - 6th Grade Level'. A red box highlights the 'My Banks' list, and a red arrow points from it to the 'MEASURABLE ANNUAL GOAL' field in the main form area. The main form area displays the IEP title, a 'MEASURABLE ANNUAL GOALS' section with a 'NUMBER' field set to '1' and an 'AREA' field set to 'Writing', and a 'PRESENT LEVEL OF ACADEMIC ACHIEVEMENT AND FUNCTIONAL PERFORMANCE' section containing a paragraph of text. Below these are fields for 'MEASURABLE ANNUAL GOAL' and 'METHOD(S)'.