



Special Services Creating & Inserting User Bank Items

Creating User Bank Items

- 1 Click the form field for which you want to create a user bank item. Then, below the field, click **Create**.

Note: Banks are unavailable for number, frequency, date, and signature fields.

Note: To create a bank item using preselected text, enter your desired text in the field. Then, highlight the text and click **Create**.

The **My Banks** area opens.

- 2 Enter a **Bank Name**.
- 3 In the rich text field, enter the desired content for the bank item.

Note: If you created this bank item using preselected text, the text you selected displays in the field.

Note: The following text replacements are available:

- #he/she#
- #him/her#
- #first#

- 4 Click **Create**.

The **My Banks** area closes and the new user bank item displays below the current field. To insert the bank item into the current field, click **Insert**. To copy the bank item to your clipboard, click **Copy**. To modify or delete the bank item, click **Edit**.

**see reverse side for more information*

Inserting User & District Bank Items

District bank items can be added, modified, and/or deleted only by users who have been assigned the SPECIALSERVICES - ADMINISTRATOR user role in StudentInformation. For more information, see the Managing District Banks instructional sheet.

1 Click the form field in which you want to insert a user or district bank item.

Below the field, beside **Copy From**, displays if user bank items are available, and displays if district bank items are available.

Note: If no bank items are available, you can create a new user bank item using the steps on the previous page.

2 Click **Copy From**.

MEASURABLE ANNUAL GOAL

← → **B** *I* U ~~S~~ | : : | | | Paragraph | A² AI | | |

2 Copy From Create | D'S PROGRESS TOWARDS ANNUAL GOAL

All available user bank items display below the current field on the **Personal** tab.

Note: To view district bank items, click the **District** tab.

3 Locate the desired bank item. Then, click **Insert**.

Annual Goal [X]

Personal | District

Adaptive Play Goal
He will increase his ability to function appropriately within the school environment by engaging in appropriate group activity (play, discussion, transitions) with 3 or fewer verbal prompts in 3 out of 4 trials with 80% accuracy by ____.

3 Insert
Copy
Edit

Note: To copy the bank item to your clipboard, click **Copy**. To edit or delete the bank item, click **Edit**. (**Edit** displays only if the bank item is a user bank item.)

The bank item displays in the current field. Click **X** to return to the form.

Annual Goal [X]

← → **B** *I* U ~~S~~ | : : | | | Paragraph | A² AI | | |

She will increase ability to function appropriately within the school environment by engaging in appropriate group activity (play, discussion, transitions) with 3 or fewer verbal prompts in 3 out of 4 trials with 80% accuracy by ____

Personal | District

Adaptive Play Goal
She will increase ability to function appropriately within the school environment by engaging in appropriate group activity (play, discussion, transitions) with 3 or fewer verbal prompts in 3 out of 4 trials with 80% accuracy by ____

Insert
Copy
Edit