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Lesson Objectives

- Create new task items
- Add forms to tasks
- Create task pages
- Add attachments to tasks
- Upload pages to tasks
- Delete pages, forms, and attachments
- Print forms
- Verify EMIS
This page intentionally left blank.
• **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 link to the task you want to view.

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

Creating a task can be completed in one of two ways:

- Creating a New Task
- Creating a New Task from an Existing Task

Creating a New Task

When you create a new task, the system provides all of the required forms, creating a page for each form that you can edit. You can add additional forms once the task is created. All of the pages generated display your name in the Created By field on the Open Tasks screen.

1. On the Open Tasks screen, in the Student drop-down list, select the student for whom you want to create the task.

2. Click .

The New Task window displays.
3. In the **Task Template** drop-down list, select the task you want to create.

4. In the **Task Name** field, the name defaults to the current school year followed by the task. Enter a unique task name if desired.

5. In the **School Year** drop-down list, the current school year is selected by default. If the task applies to a different school year, select a different school year from the list.

   **Note:** If you modify the task name and then select a school year other than the current school year, the task name reverts to the default task name.

6. In the **Grade Level** drop-down list, select the student’s grade level. By default, the student’s current grade level displays.

7. In the **Due Date** field, enter or select the due date. The due date is the deadline required for this event to be in compliance with EMIS.

8. Optional: If you want the task to display as **Priority** on the **Task Queue** screen, select the **Add to my priority task list** check box.

9. To create the task, click **Start Task**.
The system automatically creates the required pages for the new task and displays them on the Open Tasks screen.

From here, you can perform any of the following processes:

- Editing a Task (see the ProgressBook SpecialServices Editing Tasks Training Guide)
- Adding a Form
- Creating New Pages
- Adding Attachments
- Uploading Pages
- Deleting Pages, Forms, and Attachments
- Printing Student Forms
- Completing Pages (see the ProgressBook SpecialServices Editing Tasks Training Guide)
- Verifying EMIS
- Completing Tasks (see the ProgressBook SpecialServices Editing Tasks Training Guide)
Creating a New Task from an Existing Task

You can create a new task for a student by copying information from any of the student’s open or completed tasks. You can use this feature to create an addendum to an existing IEP, copy a prior draft to create a new IEP, or copy the goals from an IEP task to a Progress Report task.

How the information is copied depends on whether you are creating a new task from an existing task of the same type or from a task of a different type.

**Same Type**

- All of the information entered in the sections of forms from the original task are copied to the corresponding forms in the new task.
- Uploaded pages, additional forms, and attachments added to the original task are copied to the new task.

**Different Type**

- Only the information common between forms is copied to the new task.

*Note:* The demographic information is not copied from the original task to the new task. The system uses the most current demographic information from StudentInformation.
1. On the **Open Tasks** screen, in the **Student** drop-down list, select the student for whom you want to create the new task.

2. Click ✪.

The **New Task** window displays.

3. In the **Task Template** drop-down list, select the task you want to create.

4. In the **Task Name** field, the name defaults to the current school year followed by the task. Enter a unique task name if desired.

5. In the **School Year** drop-down list, the current school year is selected by default. If the task applies to a different school year, select a different school year from the list.

   **Note:** *If you modify the task name and then select a school year other than the current school year, the task name reverts to the default task name.*

6. In the **Grade Level** drop-down list, select the student’s grade level. By default, the student’s current grade level displays.

7. In the **Due Date** field, enter or select the due date. The due date is the deadline required for this event to be in compliance with EMIS.
8. In the **Create from Previous Task** drop-down list, select the task from which you want to create the new task.

   **Note:** *Only tasks completed between the current date and 18 months in the past are available for selection in the Create from Previous Task drop-down list.*

   **Note:** *Completed tasks display with Comp: preceding the task name.*

9. Optional: If you want the task to display as **Priority**, on the **Task Queue** screen, select the **Add to my priority task list** check box.

10. To create the task, click **Start Task**.

    All of the forms and attachments from the original task are created and display on the **Open Tasks** screen.

    ![Open Tasks Screen](image)

    Once you have created a task, you can perform the following processes:

    - Editing a Task *(see the ProgressBook SpecialServices Editing Tasks Training Guide)*
    - Adding a Form
    - Creating New Pages
    - Adding Attachments
    - Uploading Pages
    - Deleting Pages, Forms, and Attachments
    - Printing Student Forms
    - Completing Pages *(see the ProgressBook SpecialServices Editing Tasks Training Guide)*
    - Verifying EMIS
    - Completing Tasks *(see the ProgressBook SpecialServices Editing Tasks Training Guide)*
Adding a Form

Every task contains forms that you can or must add. For example, if the student is 16 years of age or older, you need to include the IEP 5 PostSecondary Transition Services form in your IEP task.

1. On the **Open Tasks** screen, in the **Student** drop-down list, select the appropriate student.

2. In the **Task** drop-down list, select the task to which you want to add a form.

3. Click **Add Form**.

   ![Open Tasks screenshot]

   The **Add a Form** window displays, listing the additional forms available for the task.

4. Select the check box(es) beside the form(s) you want to add to the task, and then click **Add Forms**.

   ![Add a Form screenshot]
The selected form(s) and corresponding page(s) display on the **Open Tasks** screen.
Creating New Pages

All of the required pages you need to complete the task are automatically generated when you create the task. However, you may need to create multiple pages of the same type. For example, if your student has multiple goals to meet for their IEP, you need to create an IEP 6 Goals page for each goal. You can create an entirely new page or copy an existing page from a previous task.

Additionally, you can create new pages by copying an existing page from the current task, another open task, or a completed task. For example, you can copy the goals from the Measurable Annual Goals page in an IEP to create a new Progress Report page.

Creating a New Page from Scratch

You can create a new page for any form next to which the displays.

1. On the Open Tasks screen, in the Student drop-down list, select the student for whom you want to create the page.

2. In the Task drop-down list, select the task to which you want to add a page.

   The pages created for the task display in a grid on the Open Tasks screen.

3. In the row of the page you want to add, click .

   All of the required pages you need to complete the task are automatically generated when you create the task. However, you may need to create multiple pages of the same type. For example, if your student has multiple goals to meet for their IEP, you need to create an IEP 6 Goals page for each goal. You can create an entirely new page or copy an existing page from a previous task.

   Additionally, you can create new pages by copying an existing page from the current task, another open task, or a completed task. For example, you can copy the goals from the Measurable Annual Goals page in an IEP to create a new Progress Report page.

   Creating a New Page from Scratch

   You can create a new page for any form next to which the displays.

   1. On the Open Tasks screen, in the Student drop-down list, select the student for whom you want to create the page.

   2. In the Task drop-down list, select the task to which you want to add a page.

       The pages created for the task display in a grid on the Open Tasks screen.

   3. In the row of the page you want to add, click .

   Note: For forms that do not allow multiple pages, such as the IEP 1 Future Planning, 2 Special Factors, 3 Profile form, only displays if the page has been deleted, in which case, you must create a new page because it is a required form.
A new page is created and displays in a new row under the form.

4. Optional:
   - For information on how to open the page and begin working on it, see the ProgressBook SpecialServices Editing Tasks Training Guide
   - For information on how to change the default page name to one that is meaningful to you, see the Renaming Pages section of the ProgressBook SpecialServices Editing Tasks Training Guide

Creating a New Page from an Existing Page

If displays in the row of a form, you can create a new page using information from an existing page in the current task, another open task, or a complete task, including tasks or forms transferred from another district using the District Transfers tool.

1. On the Open Tasks screen, in the Student drop-down list, select the student for whom you want to create a new page from an existing page.
2. In the Task drop-down list, select the task to which you want to add a page.
3. In the row of the page you want to create from an existing page, click .
The **Create From Existing** window opens.

4. In the **Task** drop-down list, select the task from which you want to copy the page. The **Create From** drop-down list populates with the pages that comprise the selected task.

   **Note:** Available completed tasks display with the **Comp:** prefix to assist you in selecting the correct task. All other listed tasks are currently open.

5. In the **Create From** drop-down list, select the page from which you want to copy information for your new page.

6. Click **Create Page**.

   ![Create From Existing Window](image)

   A new page (including any attachments associated with the page) displays, containing the information from the page you selected to copy in **step 5**.

7. Optional:
   - For information on how to open the page and begin working on it, see the *ProgressBook SpecialServices Editing Tasks Training Guide*
   - For information on how to change the default page name to one that is meaningful to you, see the **Renaming Pages** section of the *ProgressBook SpecialServices Editing Tasks Training Guide*
Adding Attachments

You can add editable attachments to a specific page in an open task.

- When you select to print all of the pages in a task, the attachment displays in the merged document immediately after the page to which it is attached.
- When you select to print only one page, the attachment is automatically merged with the selected page.

This topic describes how to add an editable attachment to a task page. If you want to upload a read-only PDF to a specific task page or to an overall task, see Uploading Pages.

1. On the Open Tasks screen, in the Student drop-down list, select the student for whom you want to create the page.
2. In the Task drop-down list, select the appropriate task.
3. Next to the page to which you want to add an attachment, click 📄.
The Add Attachments window opens, listing the forms that can be attached to the page.

4. Optional: To preview the form in a new window, click 📄.

5. Select the check box next to the name of the form you want to attach or click the name.

6. Click Add Attachments.

Note: To navigate to and upload your own read-only PDF from this window, see Uploading Pages.

The attachment displays in a row under the page to which it is now attached.

Note: Attachments display alphabetically under a page. To change the order, assign names using numbers or letters to specify the desired sequence. All editable attachments (signified by 📄) display above read-only PDF attachments (signified by 📄).
Uploading Pages

You can upload additional pages to a task, such as the signature page for an evaluation, an example of the student's work, or scanned pages from participants in the task who do not have access to SpecialServices. Any pages you wish to upload must be in PDF format no larger than 5 megabytes. Once they are uploaded, you can view but not edit these pages.

- To upload a read-only PDF to a specific task page, see Uploading Pages to a Specific Task Page
- To upload a read-only PDF to an overall task, see Uploading Pages to an Overall Task

Uploading Pages to a Specific Task Page

Use this procedure when you want to attach read-only PDFs to a specific task page. If you want to attach read-only PDFs that are relevant to an overall task, see Uploading Pages to an Overall Task. If you want to add an editable attachment to a task page, see Adding Attachments.

1. On the Open Tasks screen, in the Student drop-down list, select the appropriate student.
2. In the Task drop-down list, select the appropriate task.
3. Next to the page to which you want to upload a PDF, click ⚡.
The **Add Attachments** window opens.

4. Click in the **PDF File** field or click **Browse**; navigate to and select the PDF you want to upload.

5. In the **Page Name** field, enter the name you want to display on the **Open Tasks** screen for the uploaded page.

   **Note:** Once you upload the page, you cannot change the name in **SpecialServices**. You must re-upload the page with the new name and delete the page with the incorrect name.

6. Click **Add Attachments**.

   ![Add Attachments Window](image)

   **Note:** To select editable attachments from this window, see **Adding Attachments**.

The attachment displays in a row under the page to which it is now attached.

   ![Open Tasks Screen](image)

   **Note:** Attachments display alphabetically under a page. To change the order, assign names using numbers or letters to specify the desired sequence. All editable attachments (signified by ![.editable-attachment-icon]) display above read-only PDF attachments (signified by ![.read-only-attachment-icon]).
Uploading Pages to an Overall Task

Use this procedure when you want to attach read-only PDFs that are relevant to an overall task. If you want to attach pages that are relevant to a specific page of a task, see Uploading Pages to a Specific Task Page.

1. On the Open Tasks screen, in the Student drop-down list, select the appropriate student.
2. In the Task drop-down list, select the appropriate task.
3. Click Upload Page.

4. On the Upload Page window, click in the PDF File field or click Browse; navigate to and select the PDF you want to upload.
5. In the Page Name field, enter the name you want to display on the Open Tasks screen for the uploaded page.

   **Note**: Once you upload the page, you cannot change the name in SpecialServices. You must re-upload the page with the new name and delete the page with the incorrect name.

6. Click Upload Form.
The page displays under the **Uploaded Pages** heading on the **Open Tasks** screen. You can view the page by clicking its name.
Deleting Task Pages

If you have the appropriate security privileges, you can delete pages and attachment pages from a task. When you delete a page with an attachment, the attachment page is deleted automatically; you can also delete individual attachment pages.

1. With the task displayed on the Open Tasks screen, click the page you want to delete.

The selected page opens on the page edit screen.

2. In the toolbar at the top of the screen, click Delete.
The **Delete Page** confirmation window opens.

3. If you are certain you want to delete the page (and all of its associated attachments), click **Delete**.

![Delete Page Confirm Window]

The **Open Tasks** screen displays, and the page you selected to delete, as well as any associated attachment pages, no longer displays on the screen.

![Open Tasks Screen]

**Note:** If the page you deleted was the only page for a required form, + and ⌁ display so that you can add a new page. If the page was for an added form and you have the appropriate security privileges, you can delete the form from the task by clicking ⌁ (see **Deleting Added Forms**).
Deleting Added Forms

Users with the appropriate security privileges can delete added forms from the task. Before you can delete an added form, you must first delete all pages that have been created for the form. See Deleting Task Pages. If pages have already been deleted or no pages have been created for the form you want to delete,  displays in the row of the form.

1. With the task displayed on the Open Tasks screen, in the row of the form you want to delete, click .

2. On the Delete Additional Form window, click Delete.

The Open Tasks screen displays, and the form you selected to delete no longer displays in the list of forms for the task.
Deleting Uploaded Pages

Whether you uploaded a read-only PDF to a specific task page or to an overall task, there are two ways you can delete this type of attachment on the Open Tasks screen.

1. With the task displayed on the Open Tasks screen, do one of the following:
   - Locate an attachment to a specific task page (signified by preceding the attachment name) and click at the end of the row
   - Under the Uploaded Pages heading, in the row of the attachment you want to delete, click

2. On the Delete Additional Form window, click Delete.
Printing Student Forms

The Print option on the Open Tasks screen merges the pages you select from a student’s task into a single document and displays them in Adobe Reader. You can then print the document on a local printer.

The pages are merged in the order in which they display on the Open Tasks screen. To change the order in which the pages display in the printed document, you must rename the pages. See Renaming Pages in the ProgressBook SpecialServices Editing Tasks Training Guide.

**Note:** You cannot print a page if it is locked by another user. For more information about locked pages, see the Locking Pages section of the ProgressBook SpecialServices Editing Tasks Training Guide.

1. On the Open Tasks screen, in the Student drop-down list, select the student for whom you want to print forms.
2. In the Task drop-down list, select the task that contains the forms you want to print.
3. Select which form(s) to print:
   - To print specific pages, in the row of each page you want to print, select the Print check box.
   - To print all of the pages, select the Print check box in the column header.

The Print option on the Open Tasks screen merges the pages you select from a student’s task into a single document and displays them in Adobe Reader. You can then print the document on a local printer.

The pages are merged in the order in which they display on the Open Tasks screen. To change the order in which the pages display in the printed document, you must rename the pages. See Renaming Pages in the ProgressBook SpecialServices Editing Tasks Training Guide.

**Note:** You cannot print a page if it is locked by another user. For more information about locked pages, see the Locking Pages section of the ProgressBook SpecialServices Editing Tasks Training Guide.

1. On the Open Tasks screen, in the Student drop-down list, select the student for whom you want to print forms.
2. In the Task drop-down list, select the task that contains the forms you want to print.
3. Select which form(s) to print:
   - To print specific pages, in the row of each page you want to print, select the Print check box.
   - To print all of the pages, select the Print check box in the column header.
4. Optional: If you do not want page numbers to print on the forms, in the Print drop-down list, de-select the **Include Page Numbers** check box.

5. Optional: If you want to print the forms with a watermark of the word “Draft,” in the Print drop-down list, select the **Include Draft Watermark** check box.

6. Click **Print** to download the selected pages in a single PDF document.

7. Open the document and select print in your PDF viewer.

8. Optional: Save the merged document to a location of your choice on your local computer.
You can view or print the EMIS Data Collection Form for an open task to verify that the information is complete and to maintain a hard-copy record of the information that will be sent to the EMIS Extract. The EMIS Data Collection Form only displays EMIS reportable information for the current task.

**Note:** To view the EMIS Data Collection Form for a completed task, you must run the EMIS Review Report. See the ProgressBook SpecialServices EMIS Training Guide.

1. On the **Open Tasks** screen, in the **Student** drop-down list, select the student for whom you want to view the EMIS Data Collection Form.
2. In the **Task** drop-down list, select a task.
3. Click **Verify EMIS**.

**Note:** The **Verify EMIS** button is only enabled if the task contains information that is reportable to EMIS.
The EMIS Data Collection Form opens in a new browser window and displays the most up-to-date EMIS reportable information about the current student and task.

4. Optional: Use the PDF viewer options to print or save the form.

5. To return to the **Open Tasks** screen, close the browser window.

---

### EMIS Data Collection Form for Students with Disabilities

**Child’s Information**

- **Name:** Simone Palmer
- **ID Number:** 4301011
- **Grade:** 10
- **Date of Birth:** 12/17/2002
- **Gender:** F
- **Building of Attendance:** SADoc High School

**District of Residence:** SADoc

**District of Service:** SADoc

**Disability Category:** 10 Specific Learning Disabilities

**Disability Start Date:** (Enter age)

### Special Education Events

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**Secondary Planning Element** (Revise IEPs to include discussion of special education services and goals for students age 14 and above): 

**Services** (Including Transition Planning Services, if applicable):

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