

Maryland State Department of Education Division of
Special Education and Early Intervention Services
in Partnership with
The Johns Hopkins University
Center for Technology in Education,
IDEA Part B funding from the U.S. Department of Education

Maryland Online IEP System Users Guide



July 1, 2014

This document was developed and produced by the MSDE, Division of Special Education/Early Intervention Services, in collaboration with the Johns Hopkins University/Center for Technology in Education. SFY14 Part B611 Grant# H027A130035 is funded by the U.S. Department of Education, Office of Special Education and Rehabilitative Services. The views expressed herein do not necessarily reflect the views of the U.S. Department of Education or any other federal agency and should not be regarded as such. The Division of Special Education/Early Intervention Services received funding from the Office of Special Education Programs, Office of Special Education and Rehabilitative Services, U.S. Department of Education.

NOTE: Click on the blue buttons on the left-side navigation panel of the user guide to navigate/jump to the different sections of the user guide.



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Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

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Special Education and Early Intervention Services
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Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Before You Begin

Commonly Used Acronyms

Getting Help

Technical Requirements

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Maryland Online IEP System 2014

The MD Online IEP system was established in July 2005 and the Maryland Statewide IEP form and format has been released each year to reflect changes indicated in IDEA and COMAR regulations. Any change to the Maryland Statewide IEP form is incorporated into the MD Online IEP system. The 10th version (v10) is available as of July 1, 2014. This user guide provides a step-by-step demonstration of all elements of the MD Online IEP system which includes any updates applied to the system as of July 1, 2014.



Maryland Online IEP

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Username

Enter username

Password [Forgot your password?](#)

Enter password

Login

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Please read the following confidentiality statement:

An individual student's IEP developed through this online process constitutes an educational record. Each participating agency and participant or user of the Online IEP shall protect the confidentiality of personally identifiable information in accordance with federal regulations 34 CFR §99.34 C.F.R. §§ 300.610 through 300.627, and Maryland regulation COMAR 13A.08.02.

Maryland Online IEP System

In April 2003, the Maryland State Legislature mandated the development of a uniform IEP form to be used throughout all schools in Maryland. In response to this common form and format that was developed, MSDE partnered with CTE to build a web-based online IEP system that collects all critical data fields, provides forms to support the IEP process and reports. It enables local leaders to have access to "real-time" special education data and automatically report essential data to the SSIS system. A standard format eliminates the problems inherent in disparate data collection methods and assists students and families to transition easily between school districts within the state.

The MD Online IEP system facilitates the IEP process including IEP development, scheduling meetings, tracking timelines, and reporting. The system produces and maintains one complete record of IEP information for each child. The result is a high level of data integrity and accuracy from which educators and the families they serve can make effective decisions.

The MD Online IEP system:

- Is web-based and accessible to authorized users anytime, from any internet-connected computer

- Data is maintained on a secure server to assure the confidentiality of student information
- Provides real-time IEP data to school, district, and state personnel
- Maintains records which are unique, unduplicated, and permanent
- Offers search capabilities to “find” a child (one child, one record)
- Meets the requirements of Part B of IDEA and COMAR
- Features a user-friendly interface with definitions and technical support
- Links to school district student information systems
- Eliminates the need for separate SSIS data record updates by the LSS.



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Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Before You Begin

Commonly Used Acronyms

Getting Help

Technical Requirements

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Before You Begin

The user guide is accessible both linearly and non-linearly. This flexible resource is able to accommodate your specific needs. If you are interested in getting a comprehensive look at the online IEP process, experiencing the user guide linearly will likely be your best approach. If you are already familiar with the online tool, but have specific functionality questions, non-linear navigation may be most suitable.

To move through the user guide linearly utilize the navigation buttons on the left side of the screen. A navigation trail appears at the top of each section containing multiple pages so you can easily track your virtual location.

To move through the user guide non-linearly utilize the navigation bar submenu. To access the navigation bar submenu, scroll over the navigation bar and pay attention to the submenu pop-ups attached to each button. When you find the section you seek, click the corresponding submenu title to access more information.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

[Before You Begin](#)

[Commonly Used Acronyms](#)

[Getting Help](#)

[Technical Requirements](#)

Getting Started

[Locating a Student's Case](#)

[Student Compass: Caseload Level](#)

[Student Compass: Student Level](#)

[Meetings](#)

[IEP Development](#)

[Identifying Information](#)

[Eligibility](#)

[Participation](#)

[Present Levels](#)

[Special Considerations](#)

[Goals](#)

[Services](#)

[LRE and Placement Summary](#)

[Additional IEP Functions](#)

[Transferring and Exiting Students](#)

[Forms and Logs](#)

[Reports](#)

[Additional Case Level Functions](#)

[County Level/Data Manager Functions](#)

[Managing User Accounts](#)

[Editing Demographic Information](#)

[Technical Support &](#)

Commonly Used Acronyms

You may notice acronyms used throughout this site. Many are intuitive however the key below provides some of the more common acronyms and their meanings used in this guide.

Alt Assessment	Alternative Assessment
AT	Assistive Technology
BIP	Behavior Intervention Plan
COMAR	Code of Maryland Regulations
DDA	Developmental Disabilities Administration
DORS	Division of Rehabilitative Services
ELL	English Language Learner
ESY	Extended School Year
FBA	Functional Behavior Plan
HSA	High School Assessment
IEP	Individualized Education Program
LRE	Least Restrictive Environment
MHA	Mental Hygiene Administration
MSA	Maryland State Assessment
MSDE	Maryland State Department of Education
PARCC	Partnership for Assessment of Readiness for College and Careers



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Before You Begin

Commonly Used Acronyms

Getting Help

Technical Requirements

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support &

Getting Help

This user guide is designed to answer questions you might have about the MD Online IEP system. For more information on how to move through this user guide, [click here](#).

If at any time you experience technical problems, please contact your school district's MD Online IEP support. If the problem is related to hardware, system software, or the school system's network, the district's normal process for reporting these types of problems and for getting support should be used. If you encounter a problem relating directly to the MD Online IEP system, please report it to your district's MD Online IEP support who will contact MD Online IEP Support Team.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

[Before You Begin](#)

[Commonly Used Acronyms](#)

[Getting Help](#)

[Technical Requirements](#)

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support &

Technical Requirements for Users

The MD Online IEP system is accessible from any internet connection. **Microsoft Internet Explorer, Mozilla Firefox, Apple Safari or Google Chrome** may be used to access the MD Online IEP system, but must support 128-bit SSL encryption.

Please note: Any workstations and printers that you use, are the responsibility of your school district. Please make sure that printers are in a secured location, so that the confidentiality of student information is not compromised.

Technical Requirements for District Personnel

- All workstations must have an internet browser such as **Microsoft Internet Explorer, Mozilla Firefox, Apple Safari or Google Chrome**.
- The school district should evaluate whether any changes are required to the "desktop". For example, the district may want to add a new icon to launch the Online IEP application.
- The district must estimate the outbound traffic that will be generated by the new system and consider the impact to existing systems and throughput. Changes to firewalls and expansion of bandwidth to local schools may be required.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Understanding the MD Online IEP

Commonly Used Language

Things to Remember

Logging In

Welcome Screen

Navigation

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

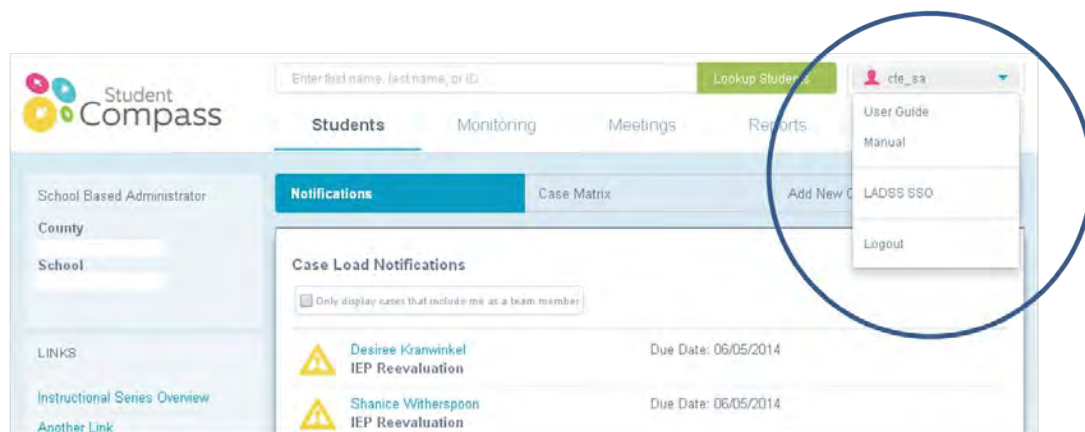
County Level/Data Manager Functions

Managing User Accounts

Getting Started

Use the following information to develop an understanding of the language used within the MD Online IEP system, how to log into the MD Online IEP system, and how to navigate through the MD Online IEP system.

The **MD Online IEP system User Guide** and the MSDE publication of the **Process Guide** are available as links from the Help pull-down menu located in the upper right hand corner of the screen. Choosing either of the links will open the document in a new window allowing access to both the MD Online IEP system and the supporting document at the same time by toggling between the two windows.





Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Understanding the MD Online IEP

Commonly Used Language

Things to Remember

Logging In

Welcome Screen

Navigation

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

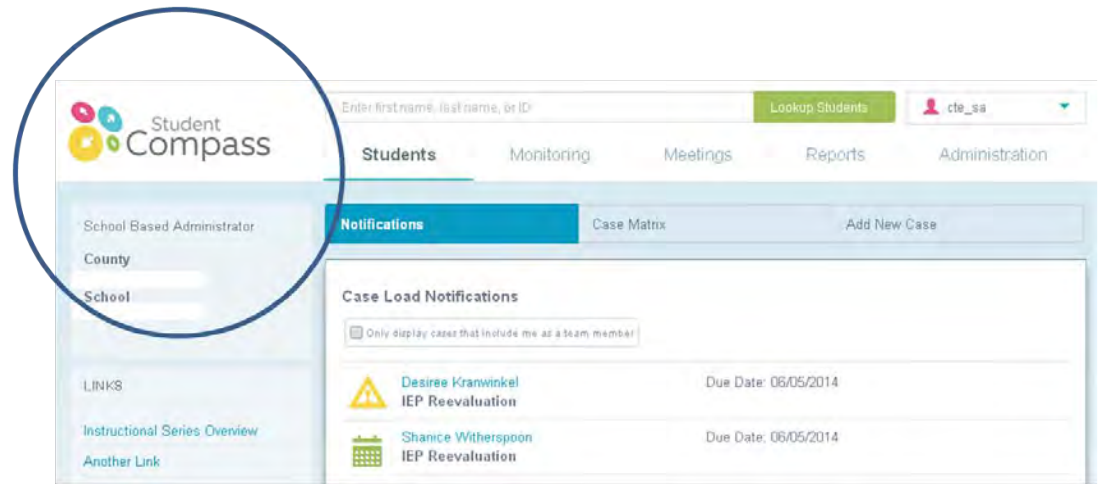
County Level/Data Manager Functions

Managing User Accounts

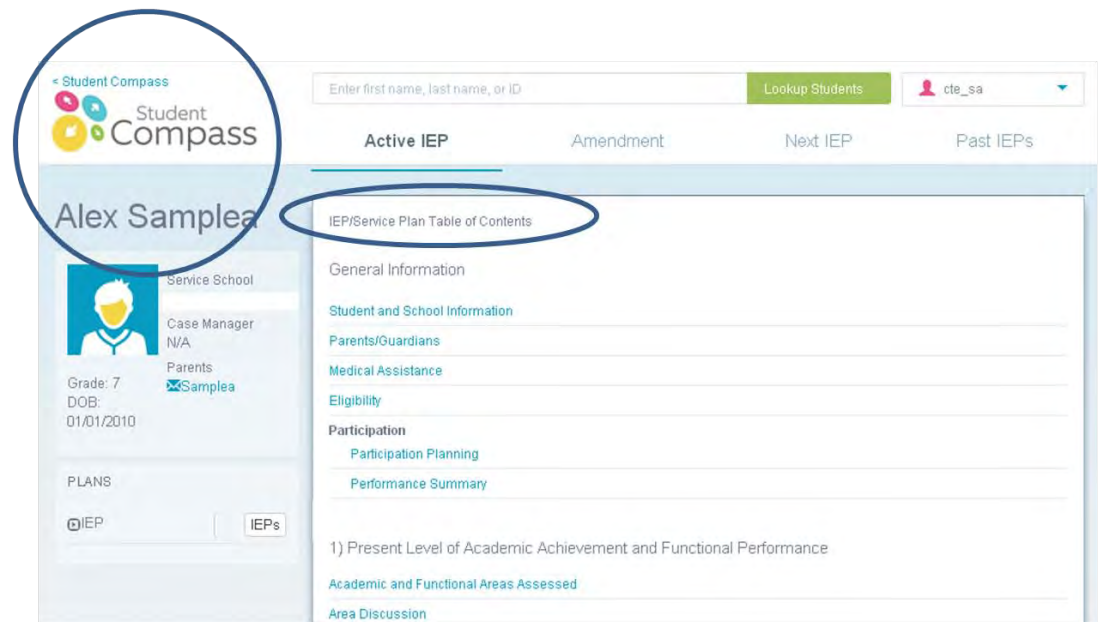
Understanding the MD Online IEP

The [Structure of the MD Online IEP system](#) can be understood as two components or modules: **Student Compass** and **IEP Module**.

1. The **Student Compass** is the module displayed upon logging into the system that has all the supporting information surrounding the IEP.



2. The **IEP Module** is the module to begin an IEP, to continue to develop, or to review a prior IEP associated with the case.



Each component has unique features but also has commonalities. Searching for a student's case is possible from either component using the **Look Up Student search feature** at the top of the page as well as accessing the user guide and process guide through the Help function. Accessing forms or

logs for a student and creating reports is only available in the Student Compass Module. A **Student Compass link** in upper left of the the IEP module will return the user to the Student Compass Module. Entering data into a student's IEP can only be accomplished from the **IEP Module**. This Guide will explain the features of each.

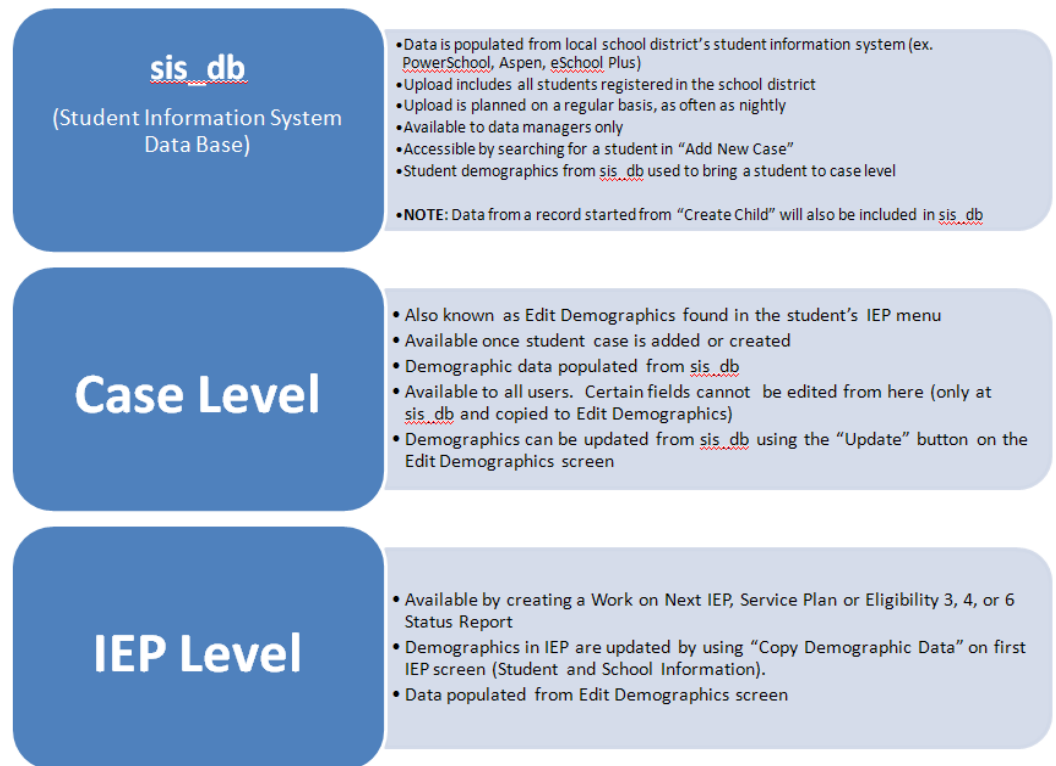
For a visual look at the MD Online IEP system and its components, see the [Structure of the MD Online IEP system document](#).

Note: Searching for a case can be done in the Student Compass module or by using the Search button at the top of each page in both the Student Compass and IEP Module. The Structure of the MD Online IEP link displays a word document pictorial of the system.

Data Structure within MD Online IEP System

Student demographic data is available to the MD Online IEP system from local school systems who provide a periodic upload of student information. This can occur as often as nightly and the frequency is determined by the local school system. Once the student demographic data is available, it can be brought to case level. At this level all forms and reports as well as development of the IEP are possible. The demographic data recorded at case level can be uploaded into a student's IEP by choosing the **Copy Demographic Data** on the **Student and School Information** screen of the IEP.

Below is a graphic display of the three levels of the MD Online IEP system:





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Understanding the MD Online IEP

Commonly Used Language

Things to Remember

Logging In

Welcome Screen

Navigation

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Commonly Used Terms in Maryland Online IEP System

The following terms are used to describe aspects of the MD Online IEP system:

Student Compass Module vs IEP Module - When first logging into the system, the Student Compass Module will appear. The Student Compass Module displays information at the **Caseload** or **Student Level**.

At the Caseload level, the following sections are available:

- **Students** - Notifications page displays the following upcoming information: meetings, annual review, reevaluations for all assigned students. Student Matrix has the Cases tab, Search tab and Add a New Case tab. The Cases tab displays all assigned students, and the Search tab is for locating a student's record.
- **Monitoring** - Displays progress on IEP goals across the caseload.
- **Meetings** - Displays all meetings across the caseload. Can click on a meeting to view the student level meeting details.
- **Reports** - Displays all reports available.
- **Administration** - Only available to users having administrative permissions assigned to their account. The user will be able to do the following: Add/Edit other IEP users, Add/Edit additional members, Add/Edit letters of documents that can be uploaded to the system for future use. CountyLevel/Data Managers with Admin permissions have additional functions available. See County Level/Data Manager Functions section of this User Guide.

The **Student Level of Student Compass** is accessed by selecting a student from the following sections: Notification, Student Matrix, Monitoring, or Meetings.

At the Student level, the following sections are available:

- **Notifications** - Displays the following upcoming information: meetings, annual review, reevaluations for the student.
- **Monitoring** - Displays progress on all IEP goals. Can click the "Track Progress" button to update progress on the IEP goal.
- **Profile** - Displays the following information: demographic, identifying parent/guardian, school, etc.. Users can update or edit the demographic information on this page.
- **IEP Summary** - Displays summary information from the IEP. The summary has a quick link to print the page.
- **Meetings** - Displays all meetings currently scheduled. Date ranges can be entered to view past or future meetings. The meeting can be edited and notifications can be sent. In addition, meetings can be scheduled from this page.
- **Forms/Logs** - Displays all logs completed for the student and links to complete new logs.

Resident and Service County and School

Resident County and School and **Service County and School** appear in several places in the MD Online IEP system and on the printed copy of the IEP. This information serves multiple purposes based on where it is located. Please refer to the document [Residence County/School and Service County/School in the MD Online IEP](#) for a comprehensive description of this information.

Close Record

Once the IEP has been completed and approved by the IEP team, the document must be closed. Closing the IEP indicates that all information contained therein has been verified, approved by the IEP team and determined an accurate report of the student's Individualized Education Program. Closing the IEP automatically sends the appropriate data to the Special Services Information System (SSIS) at the Maryland State Department of Education for later use in local and Federal reporting.

A closed IEP record cannot be reopened or deleted from the system. To make changes to the IEP, a user can create an Amendment or start a Next IEP which covers a new IEP, Service Plan or Eligibility 3, 4 or 6 Status Report.





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Understanding the MD Online IEP

Commonly Used Language

Things to Remember

Logging In

Welcome Screen

Navigation

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Things to Remember

Please remember the following when using the MD Online IEP system:

- For security reasons, the application has a time limit for how long the program remains idle. This is about 30 minutes and will log the user out at that time. Inactivity is caused by not "clicking" on anything in the program. Any "click" will reset the timer back to start; however, typing is not considered "clicking" and therefore will not reset the timer.
- **SAVE** often. Using the **SAVE** button constitutes a "click" and will reset the timer as well as assuring no data is lost. If the user navigates away from a screen in the MD Online IEP system without first saving, all data will be lost following the last time SAVE was used. It is good practice to use the **SAVE** button often.
- When using the **SAVE** button be sure to check the confirmation message at the top of the screen before navigating away. If a critical piece of information is missing, the message will appear in red at the top of the screen. This missing piece of information must be completed and the page saved again. If the page has successfully saved, a green confirmation message will appear at the top of the screen.
- Avoid using the back arrow on your browser. As with any secure website using that button is discouraged to avoid losing previously entered data. Instead, use the navigation choices on the left or top of the screen.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Understanding the MD Online IEP

Commonly Used Language

Things to Remember

Logging In

Welcome Screen

Navigation

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Logging In

The URL for the MD Online IEP system is <https://iep.online-iep.com/maryland/>.

Follow the directions below to log into the Maryland Online IEP system:

1. Enter your assigned login name and password. Take note that the password is case sensitive.
2. Click **Submit** or press **Enter** to complete the login process.

If this is the first time you log in, you will be prompted to change your password to one of your choosing and answer a secret question. This will be used if you ever need to recover your password.

Tip: If your password is forgotten, you can select "Forgot Password" and your password will be sent to your email account.

Single Sign-on

The URL for the MD Online IEP system's Single Sign-on is <https://iep.online-iep.com/sso>.

Single Sign-on is available to end users who have multiple accounts in MD Online IEP system, ECAS, IFSP. End user must be logged into MD Online IEP system to create a single sign-on account.

1. Click the **Single Sign-on Portal** link.
2. **Create the Single Sign-on ID** and associate the various system's user ID's and passwords.
3. **Select and enter an answer to a secret question** to support the forgotten password functionality.
4. Once the Single Sign-on ID is established, login to the MD Online IEP system via the Single Sign-on Portal and have a quick way to navigate to other systems with one click.



Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

Username

Password [Forgot your password?](#)

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Editing Demographic Information

Technical Support & Troubleshooting



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CENTER FOR
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EDUCATION



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Understanding the MD Online IEP

Commonly Used Language

Things to Remember

Logging In

Welcome Screen

Navigation

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Welcome Screen

After completing the login process, the **Student Compass Module Student: Notification** page will appear for Teachers and School Based Administrators. From this page, navigate through the Maryland Online IEP system, as determined by the user's access permissions. County Level/Data Managers will be directed to the Search page and will not have the Notification page as an option. Access permissions are determined by County Level/Data Managers or School Based Administrators in the local school system.

The screenshot displays the Student Compass web application interface. At the top, there is a search bar with the text "Enter first name, last name, or ID" and a "Lookup Students" button. To the right of the search bar is a user profile icon labeled "cte_sa". Below the search bar is a navigation menu with tabs for "Students", "Monitoring", "Meetings", "Reports", and "Administration". The "Students" tab is selected. On the left side, there is a sidebar with a "School Based Administrator" section containing "County" and "School" dropdown menus, and a "LINKS" section with "Instructional Series Overview" and "Another Link". The main content area is titled "Notifications" and includes a "Case Matrix" and "Add New Case" button. Below this is a "Case Load Notifications" section with a checkbox labeled "Only display cases that include me as a team member". Two notification items are listed: "Desiree Kranwinkel IEP Reevaluation" with a due date of "06/05/2014" and "Shanice Witherspoon IEP Reevaluation" with a due date of "06/05/2014".



search the site



MD Online IEP User's Guide

Orientation

Getting Started

Understanding the MD Online IEP

Commonly Used Language

Things to Remember

Logging In

Welcome Screen

Navigation

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Navigation in the Student Compass Module

After logging in, either the Notification page or the Search page in the Student Compass Module will appear. This is based on permissions/security and/or number of students assigned to them. To view a list of all assigned student, click the **Student Matrix: Cases tab**. Click a student's name to be taken to the case. Navigation options for all users include Student, Monitoring, Meetings, and Reports. Administration is available depending upon the access permissions.

Once a case has been selected, the IEP module can be accessed by clicking the **IEPs button** from the IEP Summary page to access active and prior IEP's and to create a new IEP. The **Add New Case function** is in the Student Matrix: Add New Case tab.

Note: Users see navigation options based on his/her assigned access permissions and user level.

Student Section, Notification--allows users to see a list of notifications for all students. Notifications can be filtered by Notification type.

Student Section, Student Matrix, Cases--allows users with the access permission of a teacher or school based administrator to navigate to his/her list of students.

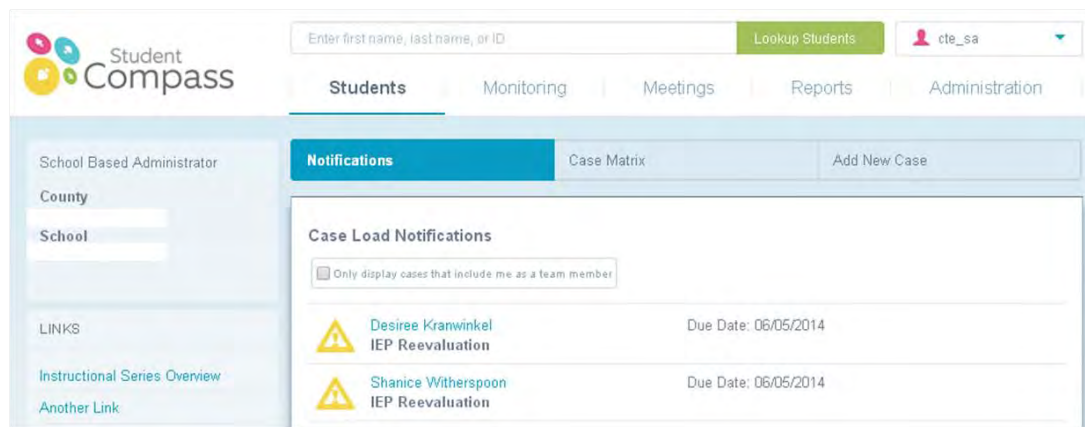
Monitoring Tab--allows users to aggregate IEP goals across all students of which the end user has access. Goals can be filtered to display only the cases of which the end users is a team member.

Meetings--Allows users to schedule any type of IEP team meeting and to view scheduled or past meetings.

Reports--allows users to navigate and access IEP reports.

Administration--allows users with access permissions to initiate Administrative functions, such as adding a new user, assigning students to a teacher, adding a case, and rolling over to the next school year.

Student Section, Notification



The Notification button is used to display a list upcoming events: meetings, annual review and reevaluations for all students. Notifications will be listed in date order then alphabetically by student last name and first name.

Student Section, Student Matrix, Cases

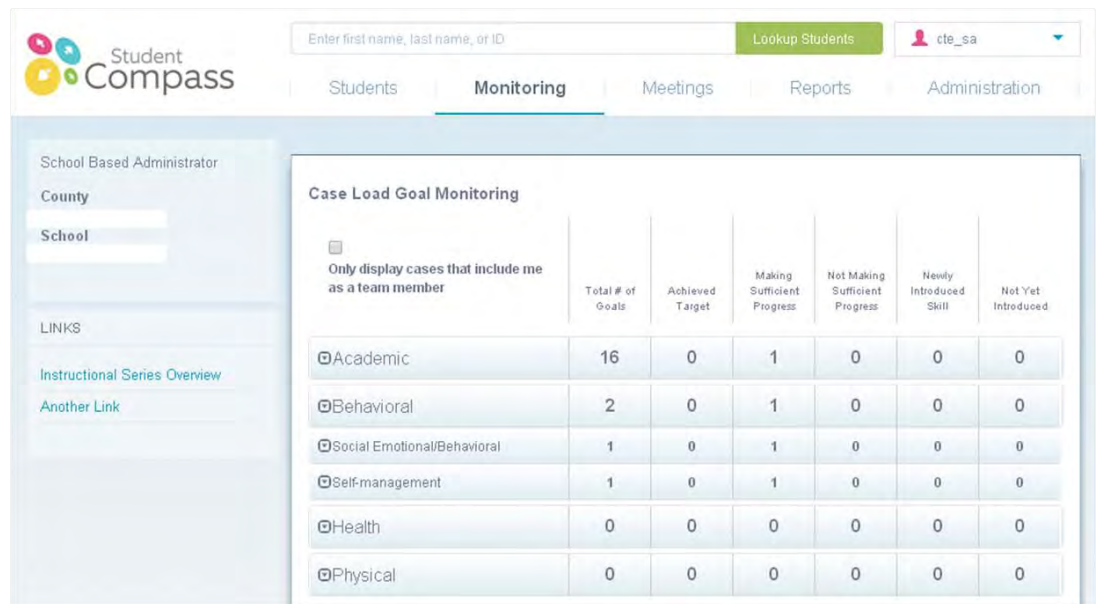
Editing Demographic Information

Technical Support & Troubleshooting



The **Cases** tab displays all students to which permission is given. Filters can be applied to this list. A new filter “Cases that include me as a team member” is available. There is a Search tab that can be used to search for a specific student. Filters can be applied to the search criteria including the filter “Cases that include me as a team member”.

Monitoring



The **Monitoring** section aggregates IEP goals depending upon permissions. This page aggregates the goals and also displays the current progress based on progress updates entered for the goal selected.

Meetings

The screenshot shows the 'Meetings' section of the Student Compass interface. At the top, there is a search bar for 'Enter first name, last name, or ID' and a 'Lookup Students' button. The user is logged in as 'cte_sa'. The navigation menu includes 'Students', 'Monitoring', 'Meetings' (which is active), 'Reports', and 'Administration'. On the left sidebar, there are fields for 'School Based Administrator', 'County', and 'School', along with 'LINKS' for 'Instructional Series Overview' and 'Another Link'. The main content area is titled 'Scheduled IEP Team Meetings' and features a 'DATE RANGE' dropdown set to 'This School Year' with an 'Apply' button. Below this, there is a list of three scheduled meetings:

Name	Date	Time	Location	Send Notifications	Edit Meeting
Lane Baker	06/02/2014	2:45 pm	classroom	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lane Baker	05/23/2014	1:00 pm	office	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Killian Bragg	05/18/2014	10:00 am	Lincoln Elementary School	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The **Meetings** section is used to schedule any type of IEP team meeting and to view scheduled or past meetings.

Reports

The screenshot shows the 'Reports' section of the Student Compass interface. The layout is similar to the Meetings section, with the 'Reports' tab active in the navigation menu. The main content area is titled 'Reports' and lists several report categories:

- Abbreviated Services
- Accommodations
- Annual Review/Reevaluation Due Date
- Assessment Report
- Assistive Technology
- Draft and Closed IEPs
- ECAS Entry Students
- FSY Report

The **Reports** section takes the user to a list of reports available to assist with monitoring and reporting of student IEP data.

Administration

The screenshot shows the 'Administration' section of the Student Compass interface, specifically the 'Users' management page. The 'Administration' tab is active in the navigation menu. On the left sidebar, there are links for 'Users' and 'Additional Members'. The main content area is titled 'Search Results' and includes a search bar. Below the search bar, there is a table for 'Users' with columns for 'Name', 'County', and 'School'. A '+ Add a New User' button is located in the top right corner of the table area. The table currently displays 'No data available in table'. Navigation buttons for 'Previous' and 'Next' are at the bottom right.

Depending upon access permissions, the **Administration section** is used to initiate Administrative functions, such as adding a new user, assigning students to a teacher, adding a case, and rolling over to the next school year.



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Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Section, Student Matrix, Case Load Tab

Student Section, Student Matrix, Search Tab

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

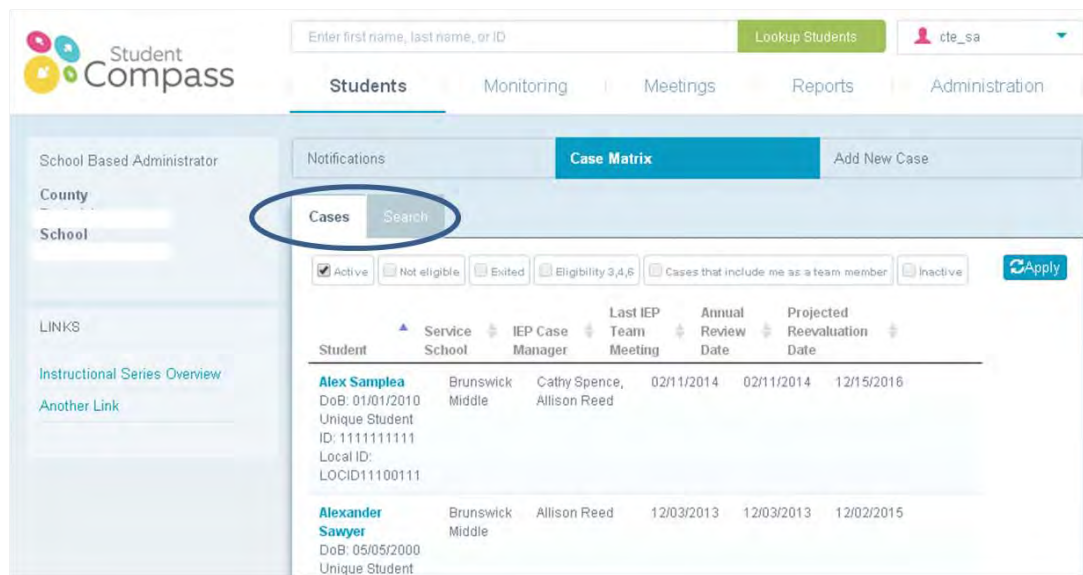
Locating a Student's Case

Locating a student's case is the first step in working on an IEP, completing any of the forms in MD Online IEP or scheduling an IEP team meeting. Searching for a student's case can be accomplished two ways: in the **Student Compass** module, **Student Section**, **Student Matrix: Cases tab** or in the **Search tab**.

Also, entering the student's name in the Search bar at the top of the screen and clicking the **Lookup Student button** will search for a student. By using the Search field at the top of the page and clicking the Lookup Student button, the Student Matrix Search tab is displayed. This is a shortcut to get to this page. Below is the search protocols while in the Student Compass Module.

Using Cases Tab to locate a Student's Case

The **Cases tab** is located in the **Student Compass Module**, **Student Matrix** section, and can be accessed from the first screen present after logging into the MD Online IEP system. If the user's caseload is small enough (ex. Teacher account with assigned caseload), the Notification tab will automatically be available when logging into the system. Or, if the first screen when logging into the system is the **Search button**, the **Cases tab** is accessible as the tab to the left. Depending on the user's level of access a varying number of students will be displayed. For a teacher, this will be a list of students assigned to his/her caseload. For a school based administrator, this will be a list of every student in his/her school. Select a student's name to access the student's case.

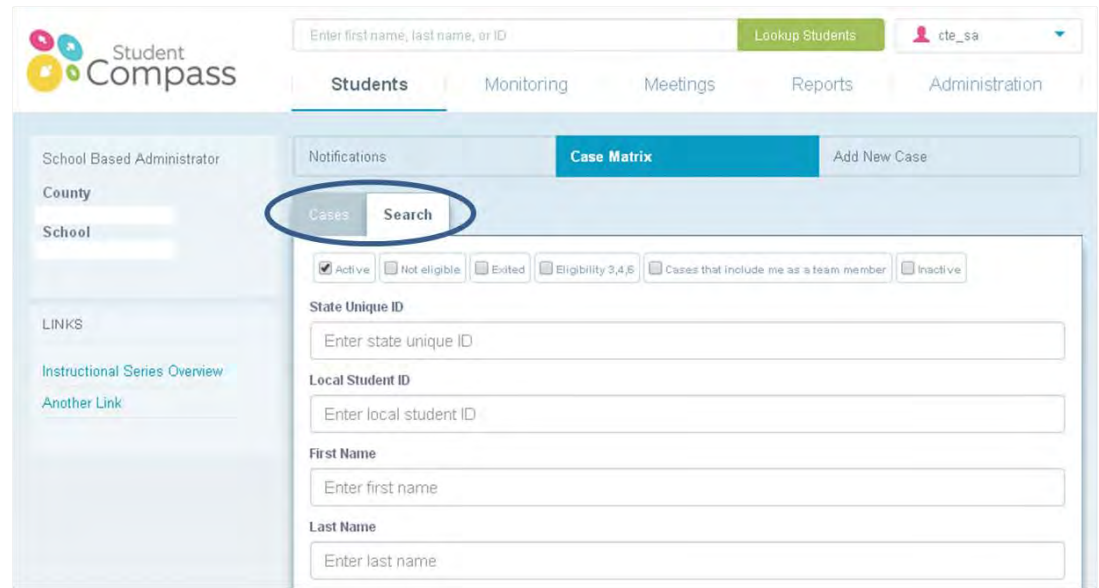


Tip: If the list of students is greater than 50, the user enter the MD Online IEP system on the Search tab. Choose Cases tab to see the list of accessible students available to the user. If the list is extensive, use of Search tab would be the only way to locate a student case.

Using Search to Locate a Student's Case

Searching for a specific student can be done by utilizing the Search tab in Student Compass module, Student

Matrix section. Demographic data can be entered into the fields provided before selecting the **Search button** to produce a list of possible matches or the student of choice. The results are limited by the amount of detailed information provided in the demographic fields in relation to the user's access permissions and student records in the system.



The screenshot shows the 'Student Compass' interface. At the top, there is a search bar with the placeholder text 'Enter first name, last name, or ID' and a green 'Lookup Students' button. To the right of the search bar is a user profile icon labeled 'cte_sa'. Below the search bar is a navigation menu with tabs for 'Students', 'Monitoring', 'Meetings', 'Reports', and 'Administration'. The 'Students' tab is selected. On the left side, there is a sidebar with the title 'School Based Administrator' and fields for 'County' and 'School'. Below these are 'LINKS' for 'Instructional Series Overview' and 'Another Link'. The main content area is titled 'Case Matrix' and has a sub-tab 'Cases' which is circled in red. Next to it is a 'Search' button. Below the 'Cases' tab are several filter checkboxes: 'Active' (checked), 'Not eligible', 'Edited', 'Eligibility 2,4,6', 'Cases that include me as a team member', and 'Inactive'. Below the filters are four text input fields: 'State Unique ID' (with placeholder 'Enter state unique ID'), 'Local Student ID' (with placeholder 'Enter local student ID'), 'First Name' (with placeholder 'Enter first name'), and 'Last Name' (with placeholder 'Enter last name').

Student Information System Database

Students new to the MD Online IEP system must be added at the case level before an IEP can be developed. Most of the local school systems using the MD Online IEP system provide a nightly upload of their student demographic data, also known as the sis_db. Students who need to be added but are not included in a nightly file upload, must be added manually through **Create Child**. For further information regarding **Create Child**, go to **Additional Case Level Functions**.

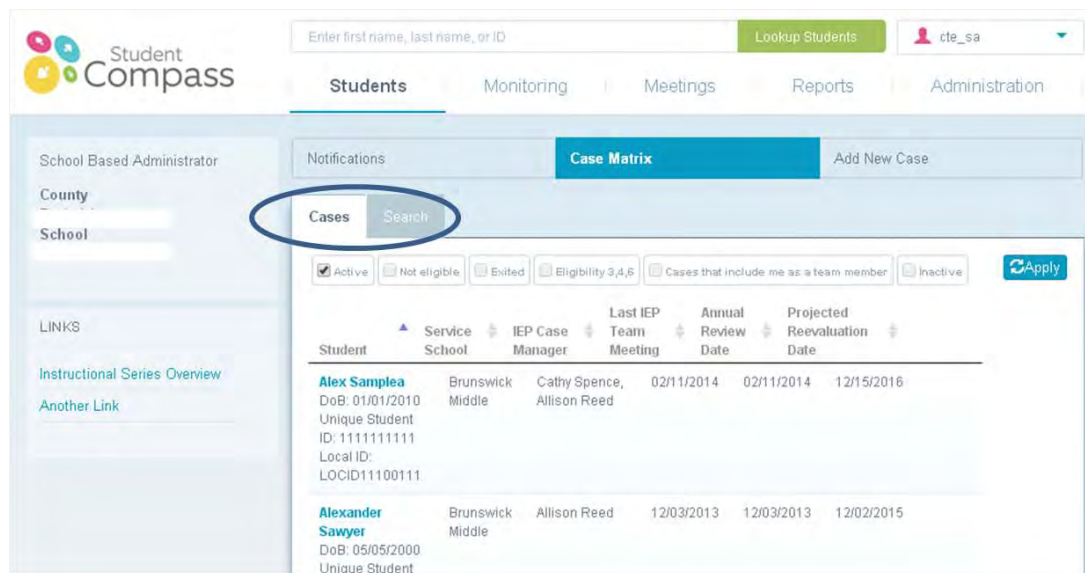




- MD Online IEP User's Guide
- Orientation
- Getting Started
- Locating a Student's Case
 - Student Section, Student Matrix, Case Load Tab
 - Student Section, Student Matrix, Search Tab
- Student Compass: Caseload Level
- Student Compass: Student Level
- Meetings
- IEP Development
- Identifying Information
- Eligibility
- Participation
- Present Levels
- Special Considerations
- Goals
- Services
- LRE and Placement Summary
- Additional IEP Functions
- Transferring and Exiting Students
- Forms and Logs
- Reports
- Additional Case Level Functions
- County Level/Data Manager Functions
- Managing User Accounts
- Editing Demographic Information
- Technical Support & Troubleshooting

Student Section, Student Matrix, Case Load Tab

The **Cases tab** is located in the **Student Compass Module, Student Matrix section**, and can be accessed from the first screen present after logging into the MD Online IEP. If the user's caseload is small enough (ex. Teacher account with assigned caseload), the **Notification page** will automatically be available when logging into the system and the user can easily navigate to. Or, if the first screen when logging into the system is the **Search button**, the **Cases tab** is accessible as the tab to the left. Depending on the user's level of access, a varying number of students will appear. For a teacher, this will be a list of students assigned to their caseload. For a school based administrator this will be a list of every student in their school. Select a student's name to access the student's case.



Tip: If the list of students is greater than 50, the user will enter the MD Online IEP system on the **Search tab**. Choose **Cases tab** to see the list of accessible students available to the user. If the list is extensive, use of **Search tab** would be the only way to locate a student case.



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Section, Student Matrix,
Case Load Tab

Student Section, Student Matrix,
Search Tab

Search for a Case

Add New Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Student Section, Student Matrix, Search Tab

Searching for a specific student can be done by utilizing the **Search tab** in the **Student Compass module, Student Section, Student Matrix section**. Demographic data can be entered into the fields provided before selecting the **Search button** to produce a list of possible matches or the student of choice. The results are limited by the amount of detailed information provided in the demographic fields in relation to the user's access permissions and student records in the system.

The screenshot shows the 'Student Compass' interface. At the top, there is a search bar with the placeholder text 'Enter first name, last name, or ID' and a 'Lookup Students' button. Below this is a navigation bar with tabs for 'Students', 'Monitoring', 'Meetings', 'Reports', and 'Administration'. The 'Students' tab is selected. On the left side, there is a sidebar with 'School Based Administrator' and 'County' and 'School' dropdown menus. The main content area has a 'Case Matrix' tab selected, and a 'Search' button is highlighted with a blue circle. Below the search button are several filter checkboxes: 'Active' (checked), 'Not eligible', 'Exited', 'Eligibility 3,4,6', 'Cases that include me as a team member', and 'Inactive'. There are also input fields for 'State Unique ID', 'Local Student ID', 'First Name', and 'Last Name'.

Tip: Using filters significantly narrows the search for a student. If the student cannot be located through initial search, try using fewer filters. Try using only Unique Student ID or only the last name. Be aware that names can have many different variations in spelling so sometimes searching by the first letter or first few letters of the last name may be helpful.



Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Section, Student Matrix, Case Load Tab

Student Section, Student Matrix, Search Tab

- Search for a Case
- Add New Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

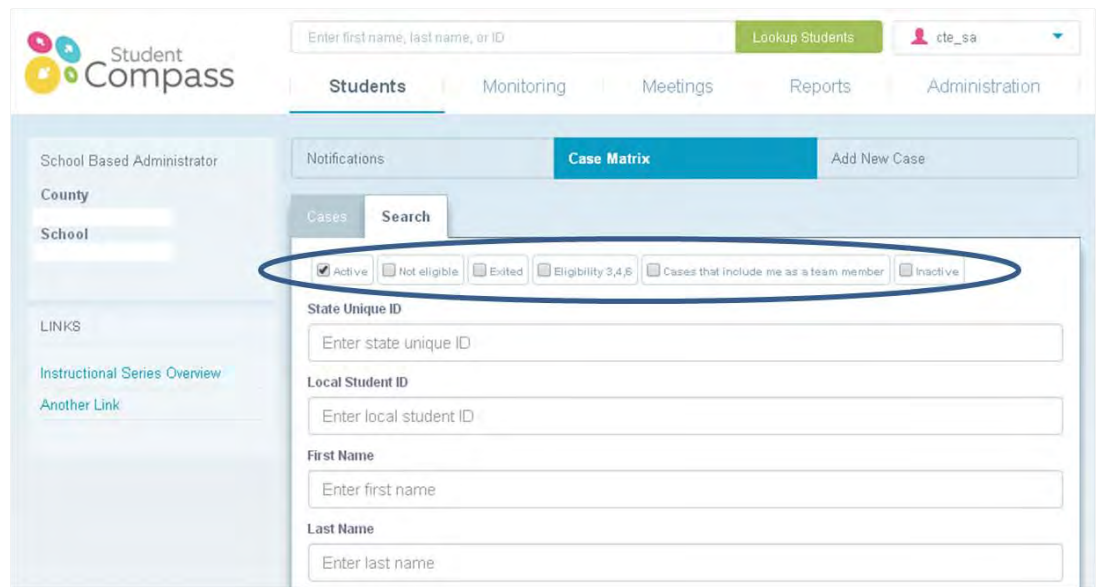
County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Search tab

The **Search** button is most commonly used when looking for a student's case. The user will only see students included in the Resident County/School or Service County/School that matches their login account. Be sure to check all search filter boxes at the top of the look up screen to be sure a student's case is not overlooked because the student case was previously **Exited** from special education or **Inactivated**, for example. If the user is sure the student is registered in the local school system listed as Resident County but cannot locate the case, reducing the demographic information filters may assist in finding the student's record. Simple clerical errors or misspellings can limit the correct return of a student's case.





MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Section, Student Matrix,
Case Load TabStudent Section, Student Matrix,
Search Tab

Search for a Case

- Add New Case

Student Compass: Caseload
LevelStudent Compass: Student
Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting
Students

Forms and Logs

Reports

Additional Case Level
FunctionsCounty Level/Data Manager
Functions

Managing User Accounts

Editing Demographic
Information

Student Information System Database (sis_db)

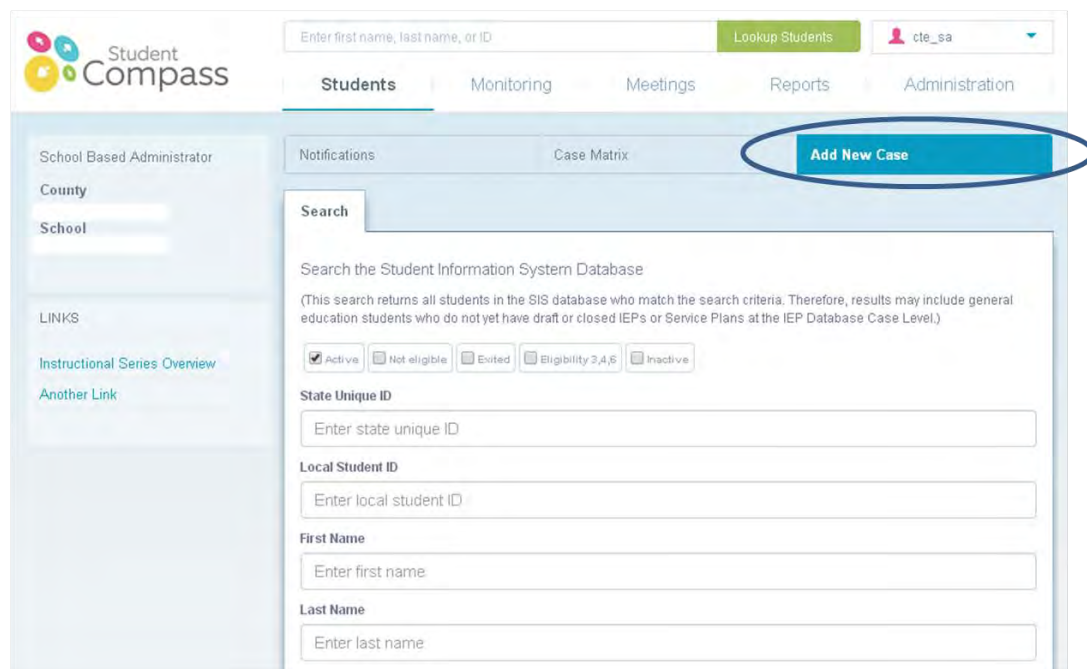
Students new to the MD Online IEP must be added at the case level before an IEP can be developed. Most of the local school systems using the MD Online IEP provide a nightly upload of their student demographic data, also known as the sis_db. Students who need to be added but are not included in a nightly file upload, must be added manually through **Create Child**. For more information regarding **Create Child**, click [here](#).

Add New Case

Note: *Add New Case is only available to County Level/Data Managers and School Based Administrators.*

Add New Case is the same as *Cases* tab in IEP module and is detailed in [Starting New or Locating Archived IEP](#) in the IEP Development section of this guide.

Add New Case is used when entering a student into the MD Online IEP system for the first time or when creating a new case for a student not currently in the student database.



The screenshot shows the 'Student Compass' interface. At the top, there is a search bar with the text 'Enter first name, last name, or ID' and a 'Lookup Students' button. To the right of the search bar is a user profile icon labeled 'cte_sa'. Below the search bar are tabs for 'Students', 'Monitoring', 'Meetings', 'Reports', and 'Administration'. The 'Students' tab is selected. On the left side, there is a sidebar with 'School Based Administrator' and 'County' and 'School' dropdown menus. Below that are 'LINKS' for 'Instructional Series Overview' and 'Another Link'. In the main content area, there are 'Notifications' and 'Case Matrix' tabs. The 'Add New Case' button is circled in blue. Below the tabs is a 'Search' section with a search bar and a 'Search' button. The search criteria include checkboxes for 'Active', 'Not eligible', 'Exited', 'Eligibility 3,4,6', and 'Inactive'. Below the search criteria are input fields for 'State Unique ID', 'Local Student ID', 'First Name', and 'Last Name'.

1. Click the **Add New Case** tab.

2. Type the criteria for the student and then click on the student's name. This will bring up the **SIS Record** with student demographics from the *Student Information System Database (sis_db)*.

3. Click **ADD CASE** to the right of the demographics box to bring the child's record to *Case Level* and ready for IEP development.

Tip: In order to **Create Child** or **Add a Case**, you must first search for the student.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Students

Monitoring

Meeting

Reports

Administration

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Student Compass: Caseload Level

After logging in, the user will be directed to the **Notification page** if they are a Teacher or School Based Administrator with access to less than 200 cases. If they have access to more than 200 cases or are a County Level/Data Manager, they will be directed to the Search page. No matter which page is displayed, the user is transacting at the Caseload level. Information will be aggregated and displayed for the specific section selected. The user can select from the sections across the top bar to navigate to information at the caseload level.



Maryland State Department of Education
Maryland Online IEP
 MSDE Division of Special Education and Early Intervention Services

MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Students

Monitoring

Meeting

Reports

Administration

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

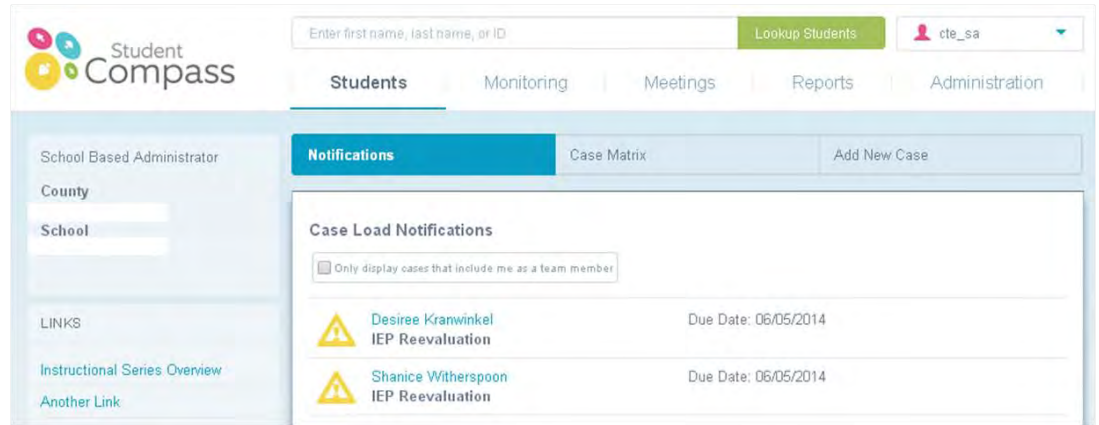
County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Students

The **Notification** page will display all upcoming meetings, annual review and reevaluations for students the user has access. The green calendar denotes a meeting. The yellow triangle with the exclamation point denotes an annual evaluation or reevaluation.



The **Student Matrix** has the **Cases** tab and **Search** tab. The **Cases** tab will display all students to which they have access. The user can use the filter at the top to change the list of students. The filter "Cases that include me as a team member" will display only the cases they are listed as a team member of. This filter can be helpful for users who are School Based Administrators. The **Search** tab allows the end user to enter in demographic information to locate a student.

Cases tab screen:



Search tab screen:

Technical Support & Troubleshooting

The screenshot shows the Student Compass web application. At the top left is the logo with the text "Student Compass". To the right is a search bar with the placeholder "Enter first name, last name, or ID" and a green "Lookup Students" button. A user profile dropdown shows "cte_sa". Below the logo is a navigation menu with "Students" (selected), "Monitoring", "Meetings", "Reports", and "Administration". On the left side, there is a sidebar for "School Based Administrator" with fields for "County" and "School", and a "LINKS" section with "Instructional Series Overview" and "Another Link". The main content area has a "Notifications" tab and a "Case Matrix" tab (selected), with an "Add New Case" button. Below this is a "Cases" section with a "Search" tab and a filter bar containing checkboxes for "Active" (checked), "Not eligible", "Exited", "Eligibility 3,4,6", "Cases that include me as a team member", and "Inactive". Below the filter bar are input fields for "State Unique ID", "Local Student ID", and "First Name".





Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Students

Monitoring

Meeting

Reports

Administration

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Monitoring

The **Monitoring** section will aggregate data across the caseload and display IEP goal data. The goals will be grouped by category and then by area. A grid will display the number of goals per the category and then then number per each progress code. This provides the user with a quick view of the progress on IEP goals across the caseload. The IEP goal category can be expanded to view the goals for the specific student. The goal can be quickly updated by clicking the Track Progress button for the goal.

The screenshot shows the 'Monitoring' section of the Student Compass application. It includes a search bar, navigation tabs, and a table of goal monitoring data.

	Total # of Goals	Achieved Target	Making Sufficient Progress	Not Making Sufficient Progress	Newly Introduced Skill	Not Yet Introduced
<input type="checkbox"/> Academic	16	0	1	0	0	0
<input type="checkbox"/> Behavioral	2	0	1	0	0	0
<input type="checkbox"/> Social Emotional/Behavioral	1	0	1	0	0	0
<input type="checkbox"/> Self-management	1	0	1	0	0	0
<input type="checkbox"/> Health	0	0	0	0	0	0
<input type="checkbox"/> Physical	0	0	0	0	0	0



Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Students

Monitoring

Meeting

Reports

Administration

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Meetings

The **Meetings** section will aggregate all meetings across the caseload and display them in date order, then alphabetical order. The user can view scheduled meetings and view details of a specific meeting. See the [Meetings section in the User Guide](#) for further information and detailed instructions.

The screenshot shows the 'Meetings' section of the Student Compass application. At the top, there is a search bar with the text 'Enter first name, last name, or ID' and a 'Lookup Students' button. The user is logged in as 'cte_sa'. The navigation menu includes 'Students', 'Monitoring', 'Meetings' (which is selected), 'Reports', and 'Administration'. On the left side, there is a sidebar for 'School Based Administrator' with fields for 'County' and 'School', and a 'LINKS' section with 'Instructional Series Overview' and 'Another Link'. The main content area is titled 'Scheduled IEP Team Meetings' and features a 'DATE RANGE' dropdown set to 'This School Year' with an 'Apply' button. Below this, there is a list of three meetings:

Meeting Name	Date and Time	Location	Actions
Lane Baker	06/02/2014 2:45 pm	classroom	Send Notifications, Edit Meeting
Lane Baker	05/23/2014 1:00 pm	office	Send Notifications, Edit Meeting
Killian Bragg	05/18/2014 10:00 am	Lincoln Elementary School	Send Notifications, Edit Meeting



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Students

Monitoring

Meeting

Reports

Administration

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Reports

The **Reports** section will list all reports available to the user based on security permissions. See the [Reports section in the User Guide](#) for further information and detailed instruction.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Students

Monitoring

Meeting

Reports

Administration

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

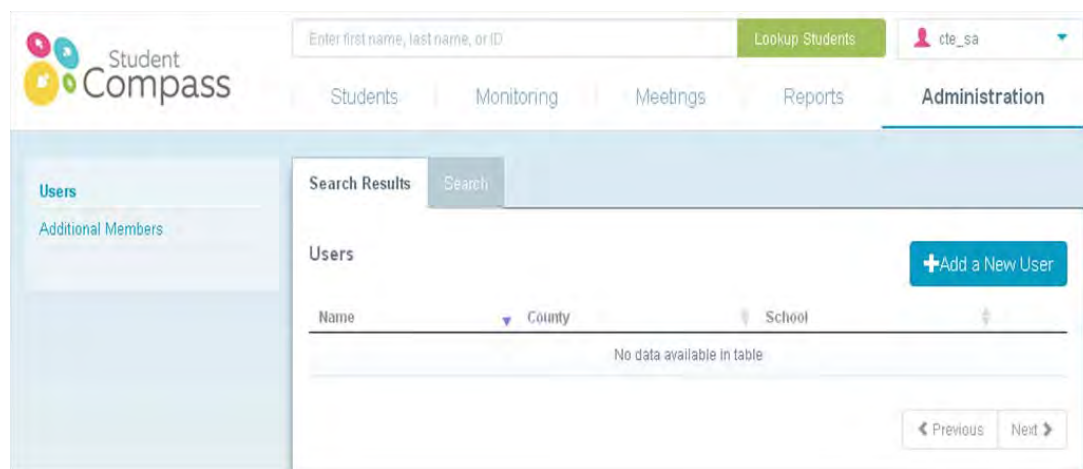
County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Administration

The Administration section will list all administrative tasks. The list of available tasks will be based on the user's security permissions. See the [Additional Case Level Functions](#) and the [County Level/Data Manager Functions](#) sections in the User Guide for further information and detailed instruction.





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Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Notification

Monitoring

Profile

IEP Summary

Meetings

Forms

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Student Compass: Student Level

There are several ways to get to the student level of **Student Compass**. The user can select a student from the Notification section, and the Notification page for this student will be displayed. If a student is selected from the Meetings Section, then the IEP Team Meeting detail page will be displayed. If a student is selected from the Monitoring section, then the Monitoring page for the student will be displayed. In addition, once a student's case has been located through the Cases tab, the Notification page will be displayed. The user is now transacting at the individual student level of Student Compass.

At the Student level, buttons to access information include **Notifications** which displays notifications for the student; **Monitoring** which displays progress against the IEP goals and allows the user to update progress on IEP goals; **IEP Summary** which displays key elements of the student's IEP and access to the IEP Module; **Meetings** which displays all scheduled, prior meetings, and allows the user to schedule meetings, and **Forms** which displays all forms that have been completed for the student or links to complete a new one.

The left panel will display links to **access the IEP**, key information from **IFSP and ECAS** for the student, if it exists. Click the arrow next to the system name to display the information.

The screenshot shows the Student Compass interface for a student named Alex Samplea. The top navigation bar includes a search field, a 'Lookup Students' button, and a user dropdown menu showing 'cte_sa'. Below the navigation bar are tabs for 'Students', 'Monitoring', 'Meetings', 'Reports', and 'Administration'. The 'Students' tab is active, and the 'Profile' sub-tab is selected. The profile page displays the student's name 'Alex Samplea' and a profile picture. To the right of the picture, it shows 'Service School', 'Case Manager: N/A', and 'Parents: Samplea'. Below this, it lists 'Grade: 7' and 'DOB: 01/01/2010'. There are buttons for 'PLANS' and 'IEPs'. The main content area is titled 'Demographics' and includes a 'View/Edit Demographics' link. The demographics section contains the following information:

DOB	01/01/2010	Residence School	
Parent from SIS Feed	Samplea	Service School	
Email Address	email@mail.com	Grade	7
Mailing Address	123 Main Str. Apt. 102 Montgomery, MD 45000	Primary Disability	
Phone		Areas Affected by Disability	

At the bottom of the page, there are tabs for 'Recent Logs and Forms', 'File Uploads', 'Case Access History', and 'IEP Team'. Below these tabs is a section for 'Recently Completed Forms (Last 90 Days)'.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Notification

Monitoring

Profile

IEP Summary

Meetings

Forms

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

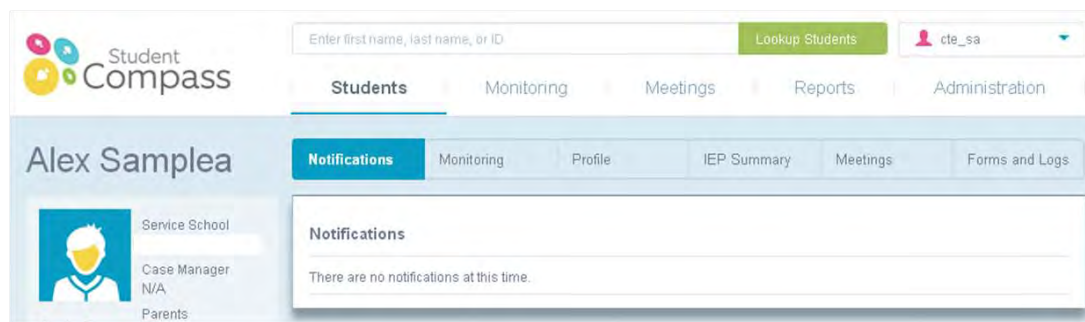
Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Notification

The **Notification** page will display notifications for the following upcoming events: meetings, annual reviews and reevaluations for the student. The green calendar denotes a meeting. The yellow triangle with the exclamation point denotes an annual review or a reevaluation





Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Notification

Monitoring

Profile

IEP Summary

Meetings

Forms

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Monitoring

Monitoring page will display all IEP goals and the last progress code and date of entry. Goals will be categorized by type: Academic, Behavioral, Health and Physical. The progress for each goal will be displayed graphically based on prior goal progress updates. The user will be able to add new progress updates for any/all of the IEP goals by clicking Track Progress button.

The screenshot shows the 'Student Compass' interface. At the top, there's a search bar and a 'Lookup Students' button. Below that, a navigation menu includes 'Students', 'Monitoring', 'Meetings', 'Reports', and 'Administration'. The 'Monitoring' tab is active, showing a sub-menu with 'Notifications', 'Monitoring', 'Profile', 'IEP Summary', 'Meetings', and 'Forms and Logs'. The main content area is for 'Alex Samplea' and is titled 'Goal Monitoring'. It lists three academic goals and one behavioral goal, each with a description, progress status, date, and a 'Track Progress' button.

Category	Goal Name	Description	Progress Status	Date	Action
Academic (3)	Reading Comprehension	Given a variety of grade level texts, Alex will answer basic comprehension questions with an average score of 70% on 4 out of 5 texts.	Sufficient Progress	03/28/2014	Track Progress
	Written Language Expression	Alex will use the writing process to create a response with a score 70% on a writing rubric on 3 out of 4 writing pieces.	Sufficient Progress	03/28/2014	Track Progress
	Organization	Alex will remain organized by keeping papers in his locker and binder in the proper location, completing assignments, and turning in assignments on time for 4 out of 5 days.	Sufficient Progress	03/28/2014	Track Progress
Behavioral (1)	Self-management	Alex will begin his classwork and remain on task for 15 minutes as measured by completing 75% or more of the assigned task by the end of the class period.	Sufficient Progress	03/28/2014	Track Progress



search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Notification

Monitoring

Profile

IEP Summary

Meetings

Forms

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Profile

The **Profile** page provides the user access to pertinent case management information. The student's demographic information along with parent information is displayed. If the user has the appropriate security, they can edit the student demographics via the **View/Edit Demographics** button or can update the demographics with the information currently in the SIS_db via the **Update Demographics from SIS** button.

Click the **Upload New File** button on the page.

Editing Demographic Information

Technical Support & Troubleshooting

In addition to Demographics, a series of tabs provides quick access to:

- the most recent forms and logs that have been completed for the student
- files that have been uploaded to the student's record
- the most recent Parent Notifications
- a log of recent Case Access History recording the user's identification and date/time stamp
- list of the IEP Team and ability to add and edit team members



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Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Notification

Monitoring

Profile

IEP Summary

Meetings

Forms

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

IEP Summary

The **IEP Summary** tab provides a summary of the essential elements of the student's most recently closed/active IEP. Also, there is an **IEPs** button that goes to **Active IEP**. See the **IEP Summary** section in the **User Guide** for further information and detailed instructions.

Student Compass

Enter first name, last name, or ID [Lookup Students](#) cte_sa

Students | Monitoring | Meetings | Reports | Administration

Alex Samplea

Notifications | Monitoring | Profile | **IEP Summary** | Meetings | Forms and Logs

IEP Summary [IEPs](#)

Basic Information

Participating	Primary Disability	OTHER HEALTH IMPAIRMENT
MMSR	Special Education Placement	INSIDE GENERAL EDUCATION (80% or more)
N/A		

Special Considerations

Visually Impaired	Assistive Technology Device	Yes
Hearing Impaired	Special Communication Needs	No
Behavioral Intervention Plan	Limited English Proficiency	No

Accommodations

Instructional and testing accommodations were considered and no instructional and testing accommodations are required at this time.



Maryland State Department of Education
Maryland Online IEP
 MSDE Division of Special Education and Early Intervention Services

MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Notification

Monitoring

Profile

IEP Summary

Meetings

Forms

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Meetings

The **Meeting** page will display past and upcoming meeting and the ability to schedule new meetings. Also, there is a **"Schedule and IEP Meeting"** button. See the [Meetings section in the User Guide](#) for further information and detailed instructions.



Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Notification

Monitoring

Profile

IEP Summary

Meetings

Forms

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Forms

The **Forms** page will display all forms available to the user. The section at the bottom of the page contains the various logs that can be completed. See the [Forms section in this User Guide](#) for further information and detailed instructions.

The screenshot shows the 'Student Compass' interface. At the top, there is a search bar and a 'Lookup Students' button. Below that are navigation tabs for 'Students', 'Monitoring', 'Meetings', 'Reports', and 'Administration'. The 'Students' tab is active, showing a profile for 'Alex Samplea'. The profile includes a photo, service school, case manager, and parents. Below the profile is a 'PLANS' section with a dropdown menu showing 'IEP'. The main content area is titled 'Forms and Logs' and contains a 'Process Forms' section. Under 'Supplemental Forms', there are three items:

- (0) Mod-HSA IEP Team Decision-Making Process Eligibility Tool: Includes a '+ Complete Form' button and a printer icon. Resources listed: Clarification Document for Mod-HSA Eligibility Criteria, Differences Among Assessments Chart for Students Receiving Special Education Services, Criteria for Identifying Students with Disabilities for Participation in a Mod-HSA, Mod-MSA and Mod-HSA Questions and MSDE Responses.
- (0) Mod-MSA IEP Team Decision-Making Process Eligibility Tool
- (0) Alt-MSA IEP Team Decision-Making Process Eligibility Tool: Includes a '+ Complete Form' button and a printer icon. Resources listed: Differences Among Assessments Chart for Students Receiving Special Education Services, Technical Assistance Bulletin #17.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

Scheduling, Viewing and Editing a Meeting

Adding an IEP Team Member

Managing Team Members

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

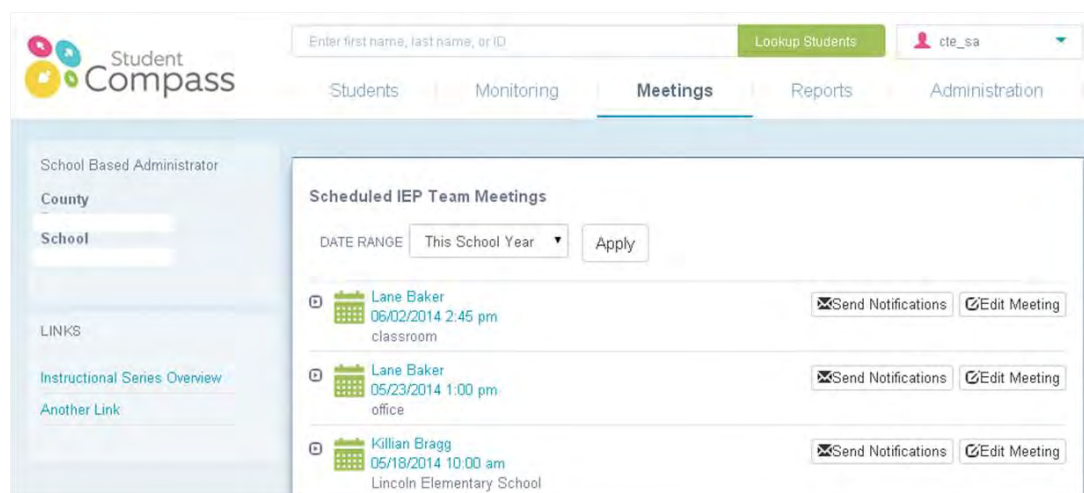
Editing Demographic Information

Technical Support & Troubleshooting

Meetings Overview

This section allows the user to **Schedule a Meeting**, access **Scheduled Meetings**, and **View Past Meeting Information**. This section also allows for meeting notes and e-mail communications with IEP team members.

Caseload Level: Clicking the **Meetings** section at the top of Student Compass will display meetings at the **caseload level**. At the caseload level, all meetings for the entire case load will be displayed. Using the filter "only display cases that include me as a team member" will assist School Based Administrators in seeing only their cases. Date ranges can be selected to view meetings across the case load for a specific time period. Clicking on the calendar icon will provide summary information about the meeting. In addition, the meeting can be edited and notifications can be sent by clicking the appropriate button for that meeting.



Clicking a student's name will take the user to the **student level of Meetings** and to the meeting details for the specific scheduled meeting. From the **IEP Team Meeting page**, the meeting can be edited and notifications can be sent by clicking the appropriate button. To view all meetings for the student click the Meetings button.

Student Level: Clicking the Meeting button will display all meetings specific to the student. Date ranges can be selected to view meetings for a specific time period. Clicking on the calendar icon will provide summary information about the meeting. In addition, the meeting can be edited and notifications can be sent by clicking the appropriate button for that meeting. A meeting can be scheduled by clicking the **Schedule an IEP Meeting** button.


Student Compass

Enter first name, last name, or ID cte_sa

Students | Monitoring | Meetings | Reports | Administration

Alex Samplea

Notifications | Monitoring | Profile | IEP Summary | **Meetings** | Forms and Logs



 Service School
Case Manager: N/A
Parents: Samplea

Grade: 7
DOB: 01/01/2010

PLANS
 IEP IEPs

Scheduled IEP Team Meetings

DATE RANGE: This School Year

<input checked="" type="checkbox"/>	 Alex Samplea 02/11/2014 1:30 pm Front Office Conference	<input checked="" type="checkbox"/> Send Notifications <input type="checkbox"/> Edit Meeting
<input checked="" type="checkbox"/>	 Alex Samplea 11/19/2013 1:30 pm Front Office Conference	<input checked="" type="checkbox"/> Send Notifications <input type="checkbox"/> Edit Meeting





search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

Scheduling, Viewing and Editing a Meeting

Adding an IEP Team Member

Managing Team Members

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Scheduling a Meeting

There are two ways to schedule an IEP team meeting for a student:

1. Meetings Page - Clicking the Schedule an IEP Meeting button
2. Notice of IEP Team Meeting form - Completing the form.

SCHEDULE A MEETING FOR THIS CASE

Locate a student's case and then select the **Meetings** button to navigate to the Meetings page. Click **Schedule** and **IEP Team Meeting** button to display the Schedule an IEP Team Meeting page.

The screenshot shows the 'Student Compass' interface for a user named 'cte_sa'. The main navigation bar includes 'Students', 'Monitoring', 'Meetings', 'Reports', and 'Administration'. The 'Meetings' tab is active, showing a sub-menu with 'Notifications', 'Monitoring', 'Profile', 'IEP Summary', 'Meetings', and 'Forms and Logs'. The main content area is titled 'Alex Samplea' and features a profile card on the left with details like 'Service School', 'Case Manager', 'Parents', 'Grade: 7', and 'DOB: 01/01/2010'. The right side of the page is titled 'Scheduled IEP Team Meetings' and includes a '+Schedule an IEP Meeting' button. Below this, there is a 'DATE RANGE' dropdown set to 'This School Year' and an 'Apply' button. A list of two scheduled meetings is shown, each with a calendar icon, the student's name, date and time, and location, along with 'Send Notifications' and 'Edit Meeting' buttons.

When scheduling a new IEP team meeting through the **Schedule an IEP Team Meeting** page, complete the requested information, including selecting the team members that are to be included in the meeting. If the team member is not listed, then team members can be added using the **Add Team Member** button. When adding team members, enter the appropriate information and then click the **Save** button. The name will appear on the Team Member list and can be added to the meeting. Once all information is entered click the **Save** button, the meeting will appear on the Meetings page at both the Caseload and Student levels.

The screenshot shows the 'Schedule an IEP Meeting' form in the Student Compass interface. The user is logged in as 'cta_sa'. The form includes the following fields and options:

- Date:** A date picker set to 31.
- Time:** Dropdown menus for hour (10), minute (40), and period (p.m.).
- Location:** A text input field labeled 'Enter location'.
- Purpose of Meeting:** A list of checkboxes:
 - Review existing information to determine the need for additional data
 - Review written referral and/or existing data and information, and, if appropriate, determine eligibility for special education services
 - Conduct a manifestation determination
 - Develop the IEP
 - Review and, if appropriate, revise the IEP

NOTICE OF INDIVIDUALIZED EDUCATION PROGRAM (IEP) FORM

Another way to schedule a meeting is to use the **Notice of Individualized Education Program (IEP) Team Meeting form** located in the Forms and Logs section. This form utilizes the **Schedule an IEP Team Meeting page**. Complete the requested information, including selecting the team members that are to be included in the meeting. If the team member is not listed, then team members can be added using the Add Team Member button. When adding team members, enter the appropriate information and then click the Save button. The name will appear on the Team Member list and can be added to the meeting. Once all information is entered click the **Save button**. The meeting will appear on the Meetings page at both the Caseload and Student levels and in the Forms section as a completed form.

The screenshot shows the 'Process Forms' section in the Student Compass interface. The user is logged in as '22trainer'. The form list includes:

- (1) Child Find Referral [Print] [Complete Form]
- (8) Notice of Individualized Education Program (IEP) Team Meeting [Print] [Complete Form]

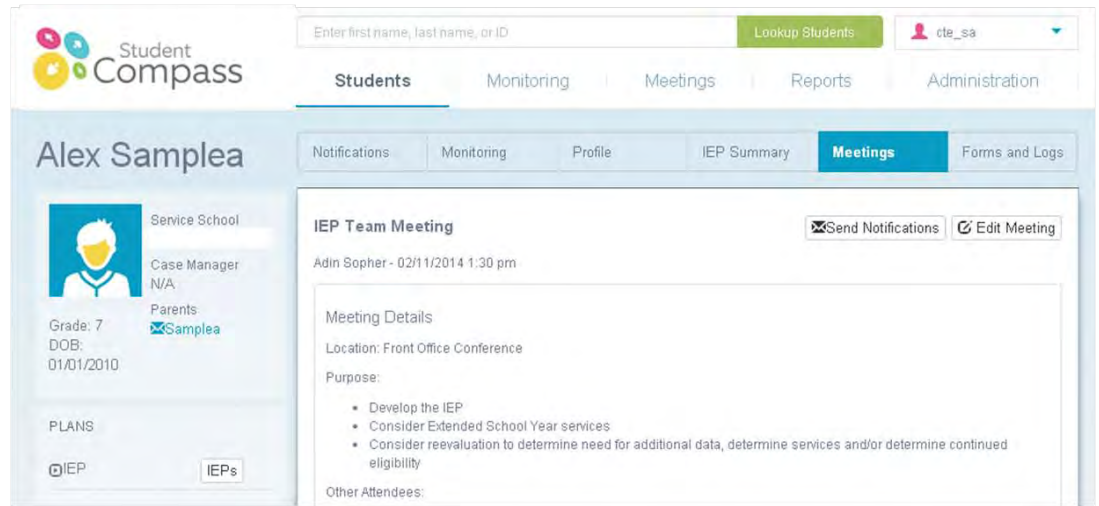
Below the list is a table of completed forms:

Meeting Date	Form Completed On	Member Titles Only	Member Titles and Names
07/29/2014	07/14/2014	Member Titles Only	Member Titles and Names
07/09/2014	06/03/2014	Member Titles Only	Member Titles and Names
07/01/2014	06/16/2014	Member Titles Only	Member Titles and Names
06/23/2014	06/06/2014	Member Titles Only	Member Titles and Names
06/05/2014	06/25/2014	Member Titles Only	Member Titles and Names

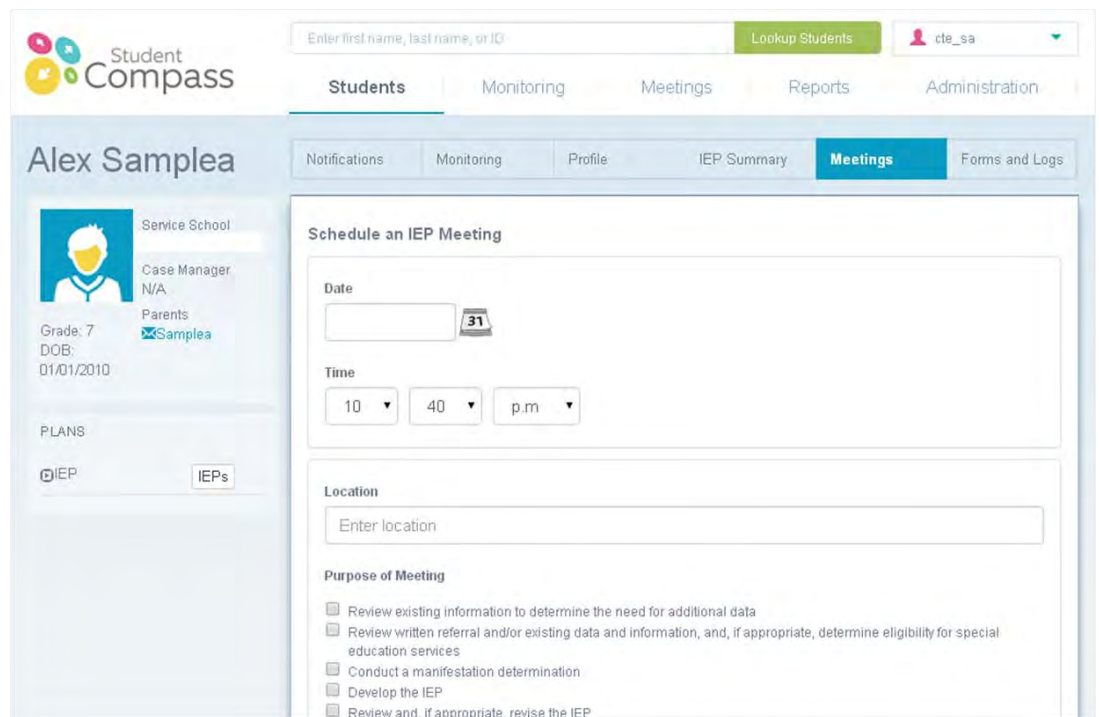
Viewing and Editing Scheduled Meetings

After a meeting has been scheduled, it will appear on the **Meetings page**, and a **completed Notice of of Individualized Education (IEP) Team Meeting form** will be listed in the Forms section. Once the meeting has

been selected, the IEP Team Meeting page with all the details will be displayed. On this page the user can edit the information regarding the scheduled meeting, record and print notes regarding the meeting, send an email to team members and record their attendance responses.

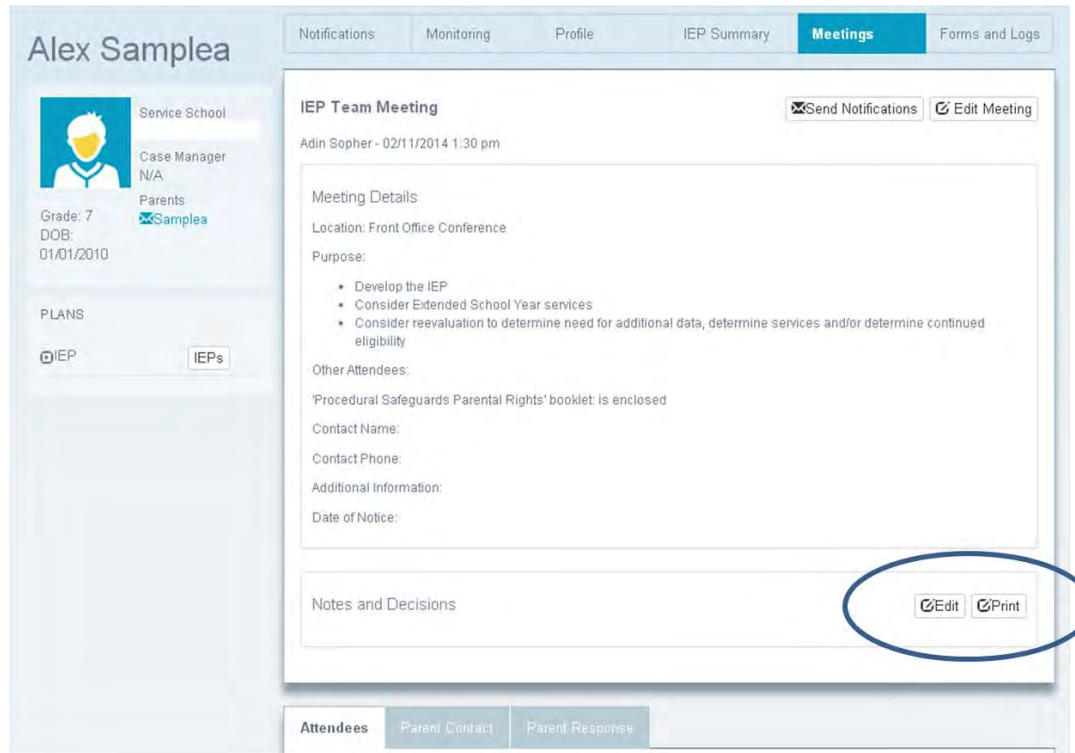


EDIT - The user can edit information regarding the scheduled meeting by selecting the **Edit Meeting** button. The Schedule an IEP Team Meeting page will appear with all the information for the specific meeting. The user can make changes and click the **Save** button, or cancel if no changes are to be made.



NOTIFICATIONS - The user can send notifications to team members by selecting the **Send Notifications** button. Team and Notifications screen will appear. Determine who you want to notify. Select individual members or select the **Check All** link to notify all team members. After making your selections, select the **Notify Checked** link.

NOTES AND DECISIONS - The user can record notes regarding the scheduled IEP meeting by clicking the **Edit** button. Document the purpose of the meeting, record any notes, and select the team members who attended the meeting. Select **Save** button. Information entered in the Notes and Decisions section can be printed by clicking the **Print** button.



Determine if you want to notify team members either by e-mail or by letter.

Contact By E-mail: The Subject and message will be prefilled with information from the meeting. This can be edited or deleted. Once all changes are made, and click on the **Send** button. The message will be sent to those who have an email address specified.

RECORDING A RESPONSE - After team members have been notified, their responses can be recorded by returning to the **Notifications** screen and selecting the **Record Response** link on the **Team and Notifications** screen. This link will only be available if the team member has been notified through the **Notify Team Member** function.



PRINT - Choosing the **PRINT** button to the right of the student's name and meeting information, will produce a copy of the notes document created through **Notes and Decisions**.

Viewing Past Meeting Information

To view details of past meetings for the selected student, **select the appropriate date range** and click the **Apply** button. Your screen will populate with a list of IEP meetings that have already occurred in the current school year or the previous year. Click on the Meeting Date to view the details of the IEP Team Meeting. This includes any information in the Notes and Decision section, a list of attendees, Parent Contact and Parent Response logs.

Student Compass

Enter first name, last name, or ID Lookup Students 22trainer

Students | Monitoring | Meetings | Reports | Administration

Alex Samplea

Notifications | Monitoring | Profile | IEP Summary | **Meetings** | Forms and Logs

Scheduled IEP Team Meetings +Schedule an IEP Meeting

DATE RANGE: This School Year

- Samu** 07/29/14 confer
 Samu 07/09/2014 10:30 am office
 Samuel Sample 07/01/2014 10:35 am Eastern Elementary

Service School
Case Manager N/A
Parents **Samplea**

Grade: 7
DOB: 01/01/2010

PLANS
 IEP IEPs

Send Notifications Edit Meeting





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

Scheduling, Viewing and Editing a Meeting

Adding an IEP Team Member

Managing Team Members

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Adding an IEP Team Member

When selecting **Add New Team Member** button from the bottom of Schedule a Meeting page, select the Team Member Type. For **Public Agency** or **Public Agency Additional Member**, select from the drop down list of people associated with the case. For **Caregiver** and **Additional Member**, complete all the fields and add this person to the case.

There are four types of IEP Meeting attendees:

- **IEP System User** - Anyone with a MD Online IEP System login assigned to the student's school or case.
- **Additional Members** - Anyone who would be assigned to a student's IEP team but would not require a login to the MD IEP system (For example: school nurse, counselor, etc.). This drop down is generated by adding additional members in the Admin Tab under the IEP button. Additional information regarding this function can found at Case Level Functions.
- **Caregiver** - A person who does not have access to the IEP database but can provide information on the student as a caregiver.
- **External User** - A person who does not have access to the IEP database and may or may not be at the school/county/state level, but will be a member of the IEP team

The screenshot shows the 'Student Compass' interface for a student named Alex Samplea. The 'Meetings' tab is active, and the 'Schedule an IEP Meeting' form is displayed. The form includes a date picker set to 31. Below the date field, there is a section for 'Attendees' with a text area for instructions. Two 'Other Attendee' input fields are present. At the bottom of the attendees section, there is a checkbox for 'Check the team members you would like to have attend this meeting.' and a red-circled button labeled '+Add a Team Member'. Below this button are fields for 'Name', 'Type', and 'Title', and 'Save', 'Cancel', and 'Clear Form' buttons.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

Scheduling, Viewing and Editing a Meeting

Adding an IEP Team Member

Managing Team Members

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

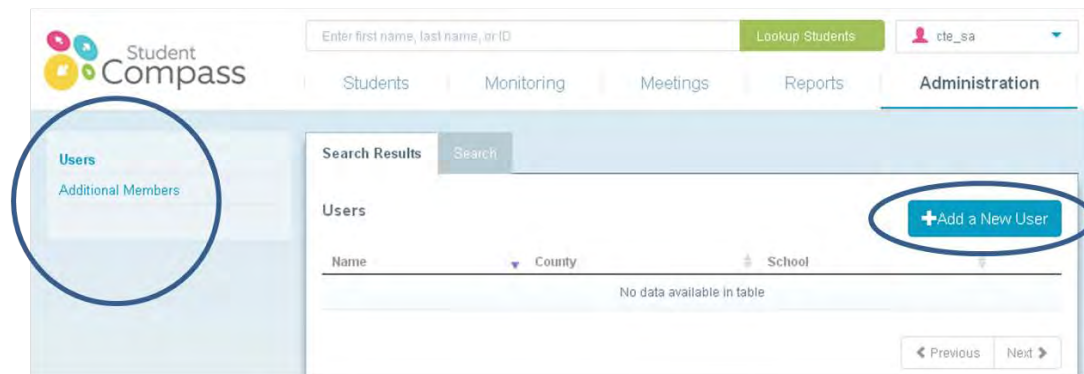
Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Managing Team Members

Team Members are managed/controlled under the Admin Section. See the [Administration section in this User Guide](#) for further information and detailed instructions.





search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Starting New or Working on Draft IEP

Creating an Amendment

Managing Team Members

Adding New Team Members

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

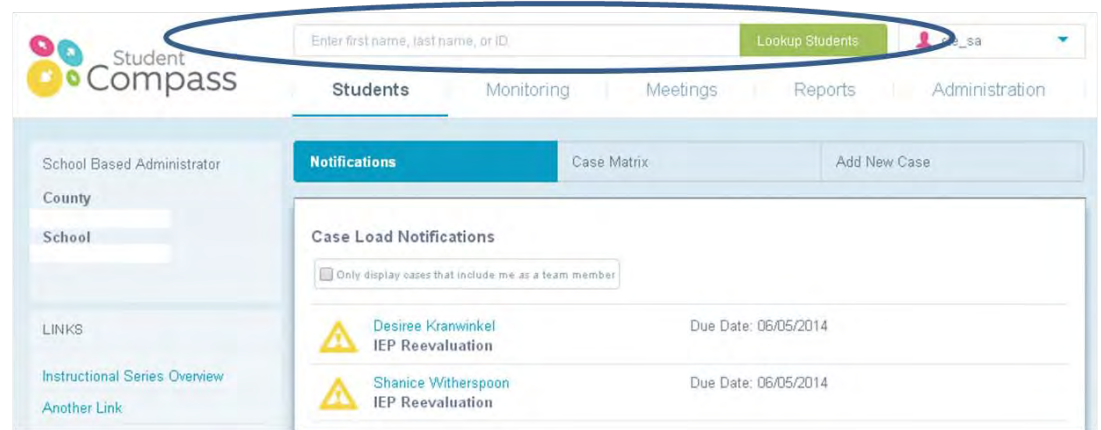
Editing Demographic Information

IEP Development

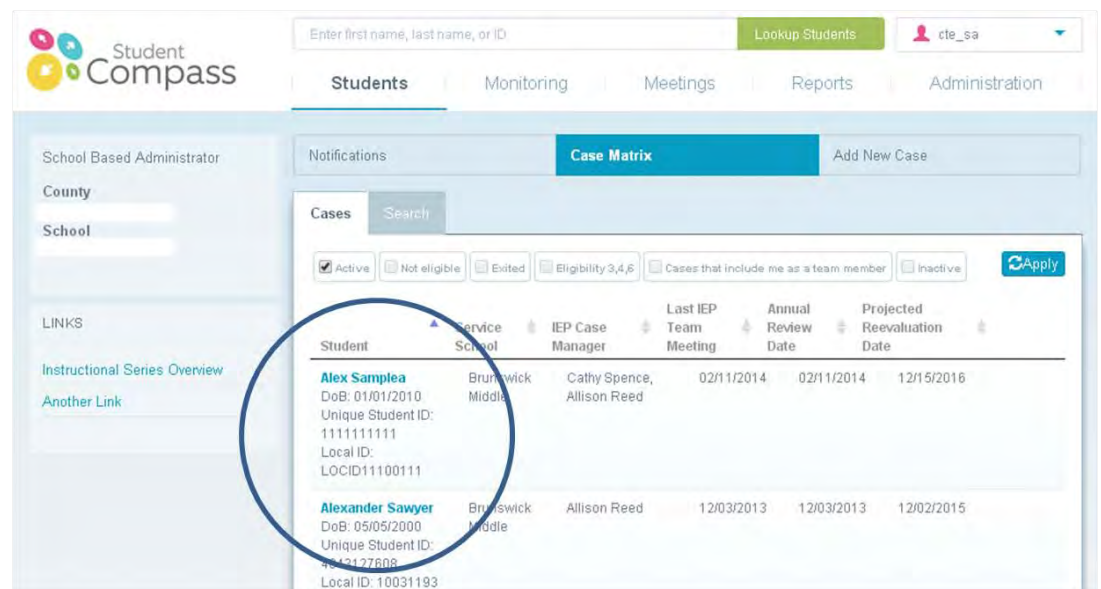
To begin completing elements of a student's IEP, search for a student. Access to the Student's IEP can be reached by clicking the IEPs button located on the IEP Summary page or in the left panel.

Follow these steps to access a student's IEP:

1. **Search for the Student** by using the search bar at the top or the Search tab in the Student Matrix section.



2. **Choose the Student** by selecting the student from the Cases tab in the Student Matrix section or from the Notification page.



3. Access the IEP Summary page and then click the IEPs button on the right side.

OR

Navigate to IEP by clicking on the IEPs button from the left panel.

Student Compass

Enter first name, last name, or ID Lookup Students cte_sa

Students Monitoring Meetings Reports Administration

Alex Samplea

Notifications Monitoring Profile **IEP Summary** Meetings Forms and Logs

Service School
Case Manager N/A
Parents Samplea

Grade: 7
DOB: 01/01/2010

PLANS

IEP IEPs

IEP Summary

Basic Information

Participating	Primary Disability	OTHER HEALTH IMPAIRMENT
MMSR	Special Education Placement	INSIDE GENERAL EDUCATION (80% or more)

Special Considerations

Visually Impaired	Assistive Technology Device	Yes
Hearing Impaired	Special Communication Needs	No
Behavioral Intervention Plan	Limited English Proficiency	No

Accommodations

Instructional and testing accommodations were considered and no instructional and testing accommodations are required at this time.

4. Once the IEPs button is clicked, the **IEP Module** appears.

5. If there is an active IEP, this will be displayed with the **IEP/Service Plan Table of Contents**. Active IEP, Amendment, Next IEP, or Past IEP's options are available by clicking the section at the top.





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Starting New or Working on Draft IEP

Creating an Amendment

Managing Team Members

Adding New Team Members

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Starting a New IEP

Starting a new IEP is labeled **Next IEP**.

If the student **does not** have an **Active IEP**, the **Next IEP** section with the IEP Table of Contents is automatically displayed after clicking the IEPs button.

If the student **has** an **Active IEP**, then the click the **Next IEP** section to begin creating the new IEP.

The **Next IEP** is the draft or working copy of the IEP and will remain until the IEP is closed.

Working on a Draft IEP

Any **IEP** or **Amendment IEP** not yet closed is considered a draft IEP. This allows the user to begin developing an IEP or amending an IEP, saving the added information and returning later to complete the document or close the IEP. To access a draft IEP choose **Next IEP**. To access a draft amendment, choose **Amendment**.

Technical Support & Troubleshooting

The screenshot shows the Student Compass web application. At the top left is the logo with the text "Student Compass". To the right is a search bar with the placeholder "Enter first name, last name, or ID", a green "Lookup Students" button, and a user profile dropdown showing "cte_sa". Below the search bar are four tabs: "Active IEP", "Amendment" (which is selected), "Next IEP", and "Past IEPs".

The main content area is for student "Alex Samplea". On the left, there is a profile card with a placeholder image, "Service School", "Case Manager N/A", "Parents" with a link to "Samplea", "Grade: 7", and "DOB: 01/01/2010". Below this is a "PLANS" section with a radio button for "IEP" and a button for "IEPs".

The right side of the page is titled "IEP/Service Plan Table of Contents" and contains a list of sections: "General Information", "Student and School Information", "Parents/Guardians", "Medical Assistance", "Eligibility", "Participation" (with sub-sections "Participation Planning" and "Performance Summary"), "1) Present Level of Academic Achievement and Functional Performance", "Academic and Functional Areas Assessed", and "Area Discussion".





Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Starting New or Working on Draft IEP

Creating an Amendment

Managing Team Members

Adding New Team Members

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Creating an Amendment

IEP Amendment can only be made to cases that have a Closed/Active IEP. **Amendment** is a section available in the **IEP module**. To **copy all the information** from the Active IEP to the Amendment, select **Student And School Information** from the IEP Table of Contents. Then click the **“Copy Active Data from Current Active IEP”** button.

The screenshot shows the Student Compass interface for a student named Alex Samplea. The 'Amendment' tab is selected and circled in blue. Below the navigation tabs, the 'Table of Contents' section is visible, with 'Student and School Information' selected and circled. A button labeled 'Copy Case Level Demographic Data' is also circled in blue. The main content area displays student information including Name and Address, Identifying Information (Unique Student ID, Local Student ID), and Demographics (Grade #, Date of Birth, Legacy Race Code, Race Code).



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site

MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Starting New or Working on Draft IEP

Creating an Amendment

Managing Team Members

Adding New Team Members

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

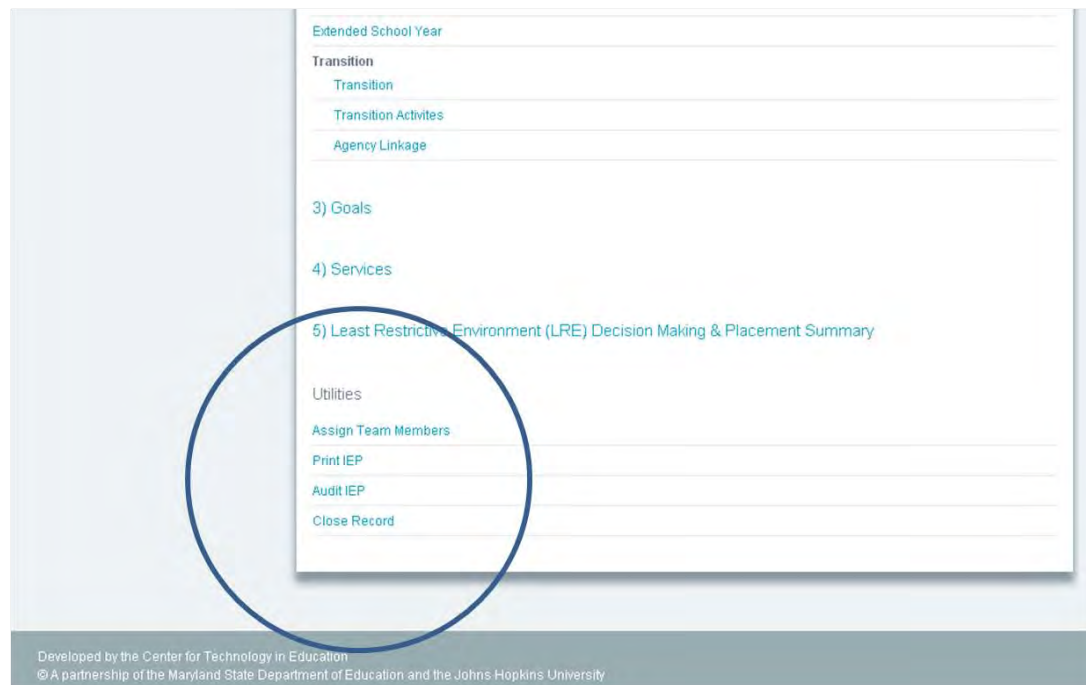
County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Managing Team Members

To assign IEP team members to a student record select **Assign Team Members** from the **Utilities** section of the IEP Table of Contents page.



Edit, Remove or Add a New Team Member to the student's IEP Team here.

Student Compass

Enter first name, last name, or ID Lookup Students cte_sa

Active IEP | Amendment | Next IEP | Past IEPs

Alex Samplea

Service School
Case Manager: N/A
Parents: Samplea
Grade: 7
DOB: 01/01/2010

PLANS
IEP Open IEP

Table of Contents
Assign Team Members

<input type="checkbox"/>	Name	Title
<input checked="" type="checkbox"/>	T	General Education Teacher
<input checked="" type="checkbox"/>	F	General Education Teacher
<input checked="" type="checkbox"/>	C	Special Education Teacher
<input checked="" type="checkbox"/>	J	Psychologist
<input checked="" type="checkbox"/>	E	Other Participant
<input type="checkbox"/>	E	Behavior Specialist
<input checked="" type="checkbox"/>	E	IEP Chair

* Not an IEP system user

Technical Support & Troubleshooting



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Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Starting New or Working on Draft IEP

Creating an Amendment

Managing Team Members

Adding New Team Members

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Adding a New Team Member

When selecting **Add New Team Member** button from the bottom of **Schedule an IEP Meeting** page, select the **Team Member Type**. For **Public Agency** or **Public Agency Additional Member**, select from the drop down list of people associated with the case. For **Caregiver** and **Additional Member**, complete all the fields and add this person to the case.

There are four types of IEP Meeting attendees:

- **IEP System User** - Anyone with a MD Online IEP System login assigned to the student's school or case.
- **Additional Members** - Anyone who would be assigned to a student's IEP team but would not require a login to the MD IEP system (For example: school nurse, counselor, etc.). This drop down is generated by adding additional members in the Admin Tab under the IEP button. Additional information regarding this function can found at Case Level Functions.
- **Caregiver** - A person who does not have access to the IEP database but can provide information on the student as a caregiver.
- **External User** - A person who does not have access to the IEP database and may or may not be at the school/county/state level, but will be a member of the IEP team

The screenshot shows the 'Student Compass' interface for 'Alex Samplea'. The 'Meetings' tab is active. The 'Schedule an IEP Meeting' form includes a date field and an 'Attendees' section. The 'Attendees' section contains instructions and two empty text boxes for adding attendees. A blue button with a plus sign and the text '+ Add a Team Member' is highlighted with a blue circle. Below this button is a table with columns for 'Name', 'Type', and 'Title'. At the bottom of the form are 'Save', 'Cancel', and 'Clear Form' buttons.

Note: Only one team member may be added at a time. You must return to the Schedule an IEP Meeting page for additional team members to be added. Team members in the dropdown, *Add from IEP System Users*, are accumulated over time from previous IEP teams and when completing the Team Member

Technical Support & Troubleshooting

information on the **Notice of an Individualized Education Program (IEP) Team Meeting** form. Be sure to review the team members before closing the IEP to assure the correct members of the team are listed as these names will appear on the first page of the printed IEP. For more information regarding adding **Additional Members** to the dropdown list, go to [Adding Additional Team Members](#).



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Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Student and School Information

Parent/Guardian Information

Medical Assistance

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Identifying Information

Once a student's case has been accessed and the **Active IEP**, **Next IEP** or **Amendment** has been selected, the first section on the IEP/Service Plan Table of Contents is **General Information**. The five sub-sections are: **Student and School Information**, **Parent/Guardians**, **Medical Assistance**, **Eligibility**, and **Participation**: **Participation Planning** and **Performance Summary**.



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Student and School Information

Parent/Guardian Information

Medical Assistance

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

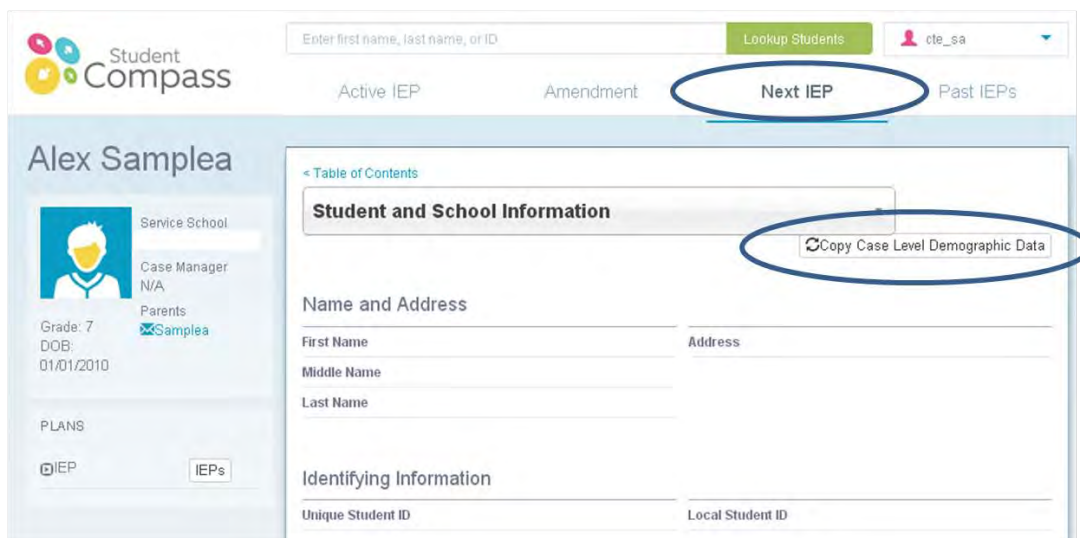
Editing Demographic Information

Technical Support & Troubleshooting

Student and School Information

To begin completing an IEP:

1. Click the **IEPs** button from the left panel or from the IEP Summary page to get to the IEP Module. The **IEP/Service Plan Table of Contents** will be displayed. This page can be accessed at any time clicking the Table of Contents link in the upper left hand corner to go back to the Table of Contents, or the navigation drop-down list in the section title located on each of the IEP pages can be used to quickly navigate to the various sections of the IEP
2. When **adding Student and School Information to a new IEP**, it is necessary to select the **Copy Case Level Demographic Data** button to import any existing demographic data into the IEP. **Click on SAVE** button at the bottom of the page.



The screenshot shows the Student Compass interface for a student named Alex Samplea. The 'Next IEP' tab is selected and circled in blue. Below the tab, the 'Table of Contents' section is visible, with the 'Student and School Information' section highlighted. Within this section, the 'Copy Case Level Demographic Data' button is circled in blue. The form includes fields for Name and Address (First Name, Middle Name, Last Name, Address) and Identifying Information (Unique Student ID, Local Student ID).

3. This will update the IEP with the demographic data found on the student's Case Level or Edit Demographics screen. Once demographic information is copied to the IEP, it cannot be edited from within the **Student and School Information page of the IEP**. Any changes to this demographic data must be made and updated by a County Level/Data Manager and copied again into the student's IEP using the **Copy Case Level Demographic Data** button.

Student Compass

Enter first name, last name, or ID Lookup Students cte_sa

Active IEP Amendment **Next IEP** Past IEPs

Alex Samplea

Service School
Case Manager: N/A
Parents: Samplea

Grade: 7
DOB: 01/01/2010

PLANS
 IEP IEPs

< Table of Contents

Student and School Information Copy Case Level Demographic Data

Name and Address

First Name	Alex	Address	123 Main Str. Apt. 102 Montgomery, MD 45000
Middle Name			
Last Name	Samplea		

Identifying Information

Unique Student ID	1111111111	Local Student ID	LOCID11100111
--------------------------	------------	-------------------------	---------------

4. Fields are available to record student's native language, which jurisdiction is financially responsible for the student, if the student is under the care and custody of a state agency and whether the student requires a parent surrogate. After entering all necessary information, select **Save**. A notification that the information has been successfully saved will appear at the top of the page.





Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Student and School Information

Parent/Guardian Information

Medical Assistance

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Parent/Guardian Information

Some Parent/Guardian Information may be filled in from Demographic File submitted by the Local School System. However, Parent/Guardian information can be added or updated at any time.

Edit or Delete Parent/Guardian Information or Add a Parent/Guardian

To **edit** the Parent/Guardian information, click on the **Edit button** to the right of the name and the Edit Parent/Guardian page will be displayed. **Enter changes** and click the **Save button**.

To **delete** a Parent/Guardian, click the **Delete button** to the right of the name.

To **add** a Parent/Guardian, click the **Add Parent/Guardian button** and the Parent/Guardian page will be displayed. **Enter all information** and click the **Save button**.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Student and School Information

Parent/Guardian Information

Medical Assistance

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Medical Assistance

If a student is not eligible for medical assistance services, enter **No** and click the **SAVE** button. There is no need to complete the additional sections.

However, if a student is eligible for medical assistance, the requested information must be entered.

Answering yes to the question, "Is the student eligible for MA?" will prompt a **Parent Authorization** page to print at the end of the IEP.

The screenshot shows the 'Student Compass' interface. At the top, there is a search bar and a 'Lookup Students' button. Below this, there are tabs for 'Active IEP', 'Amendment', 'Next IEP', and 'Past IEPs'. The main content area is titled 'Alex Samplea' and includes a profile picture, service school information, case manager (N/A), and parents (Samplea). There are 'PLANS' buttons for 'IEP' and 'IEPs'. A 'Table of Contents' dropdown menu is set to 'Medical Assistance'. The main text area contains the following information:

Parental consent must be obtained before the provider agency discloses, for billing purposes, their child's personally identifiable information to the Maryland Department of Health and Mental Hygiene (DHMH), the State agency responsible for the administration of the Medical Assistance Program, consistent with the Family Educational Rights and Privacy Act (FERPA) and the Individuals with Disabilities Education Act (IDEA). By providing consent, you understand and agree in writing that the public agency may access your child's Medicaid to pay for services provided to your child.

In order to provide a free appropriate public education (FAPE) to your child, the provider agency may not:

- Require you to sign up for or enroll in State's Medical Assistance in order for your child to receive FAPE under IDEA,
- Require you to incur an out-of-pocket expense such as the payment of a deductible or co-pay amount incurred in filing a claim for services,
- Use your child's benefits under Medical Assistance if that use would:
 - Decrease available lifetime coverage or any other insured benefit,
 - Result in your family paying for services that would otherwise be covered by Medical Assistance and that are required for your child outside of the time your child is in school,
 - Increase premiums or lead to the discontinuation of benefits or insurance, or
 - Risk loss of eligibility for home and community-based waivers, based on aggregate health-related expenditures.

Documentation of Date of Parent Signature for MA Authorization is provided at the bottom of the screen. This data is included in the **Medical Assistance Report** available in the Report Section. After entering all required information, **click the SAVE** button.



- MD Online IEP User's Guide
- Orientation
- Getting Started
- Locating a Student's Case
- Student Compass: Caseload Level
- Student Compass: Student Level
- Meetings
- IEP Development
- Identifying Information
- Eligibility**
 - Initial Eligibility Prior to Age 3 with IEP
 - Initial Eligibility Prior to Age 3-Continue IFSP
 - Initial Eligibility Student Ages 3-21
 - Continued Eligibility Data
- Participation
- Present Levels
- Special Considerations
- Goals
- Services
- LRE and Placement Summary
- Additional IEP Functions
- Transferring and Exiting Students
- Forms and Logs
- Reports
- Additional Case Level Functions
- County Level/Data Manager Functions
- Managing User Accounts
- Editing Demographic Information

Eligibility

As part of the online IEP data collection process, information about a student's eligibility needs to be gathered. Select the appropriate **Eligibility radio button** (either **Initial Evaluation Eligibility Data** or **Continued Eligibility Data**) to continue.

Note: **Initial Evaluation Eligibility Data** is completed for students who have completed the initial eligibility process. If the student is new to MD Online IEP but has been receiving services through an IEP, the **Continued Eligibility Data** page would most likely be used.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Initial Eligibility Prior to Age 3 with IEP

Initial Eligibility Prior to Age 3-Continue IFSP

Initial Eligibility Student Ages 3-21

Continued Eligibility Data

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Initial Eligibility Prior to Age 3

Note: Only for use for children under the age of 3 **AND** receiving early intervention from a local Infants and Toddlers Program (also known as Transitioning from Part C to Part B). If the child is eligible for special education services as a preschool age child (ages 3-5), the parents have the option at this time to determine to continue services through Part C IFSP or through a Part B IEP.

For children younger than 3 years of age who are transitioning from Infants and Toddlers (Part C) to Preschool (Part B), there are two scenarios.

The first scenario is listed below and the second is in the following section:

Scenario 1: Child is eligible for Part B services and will receive services through an IEP.

a. At the bottom of the Dates section, choose "Yes" to "Is this student transitioning from Infants and Toddlers (Part C) to (Preschool) Part B and receiving services through an IEP?".

b. The following date fields **should** be filled in:

- Date of parent consent for initial evaluation
- Date of initial evaluation
- Date of initial IEP development
- Date of parent consent for initiation of services
- Date IEP is in effect

c. The following date fields **should not** be filled in.

- Date of Parent Consent-Continue Early Intervention Services through and IFSP at age3
- Date local school system was notified of parent decision to request services through an IEP
- Date extended IFSP services ended

d. Reason for delay is required if:

"Date of initial evaluation" is more than 60 days after "Date of parent consent for initial evaluation"

OR

If the IEP is not in effect by the child's third birthday.

Dates

Select an age group

INITIAL ELIGIBILITY PRIOR TO AGE 3
 INITIAL ELIGIBILITY FOR STUDENT AGES 3-21

Date of parent consent for initial evaluation

31

Date of initial evaluation

31

Date of Parent Consent-Continue Early Intervention Services through an IFSP at age 3

31

Date local school system was notified of parent decision to request services through an IEP

31

Date extended IFSP services ended

31

Date of initial IEP development

31

Date of parent consent for initiation of services

31

Date initial IEP is in effect

31

Is this student transitioning from Infants and Toddlers (Part C) to Preschool (Part B) and receiving services through an IEP?

Yes No

Reason(s) for delay of initial evaluation

If evaluation for child was delayed, indicate reason(s) for delay:

- Parent repeatedly failed or refused to make the child available
- Parent refusal to provide consent caused delay in evaluation or initial services
- Parent requested delay – Parent and IEP team extend the timeframe by mutual written agreement
- School/facility closure
- Inclement weather
- Other

NOTE: Age Group must be selected and Part C to Part B question must be answered above before reasons for delay can be selected

If the parent fails to respond or refuses consent to the initial provision of special education and related services, the public agency shall not provide special education and related services to the student and will not be considered in violation of the requirement to make FAPE available in accordance with 34 CFR §300.

Note: The Date of Initial Evaluation will populate on the Close Record screen as Most Recent Evaluation Date.





Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Initial Eligibility Prior to Age 3 with IEP

Initial Eligibility Prior to Age 3-Continue IFSP

Initial Eligibility Student Ages 3-21

Continued Eligibility Data

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Initial Eligibility Continue IFSP

Scenario 2: Child is eligible for Part B preschool special education services but parents choose to remain with Part C Infant and Toddlers services through an IFSP (must be determined before third birthday).

- At the bottom of the Dates Section, choose "No" to "Is this student transitioning from Infants and Toddlers (Part C) to (Preschool) Part B?"
- The following dates **should** be filled in:
 - Date of parent consent for initial evaluation
 - Date of initial evaluation
 - Date of Parent Consent- Continue Early Intervention Services through an IFSP at age 3
- The following dates **should not** be filled in:
 - Date local school system was notified of parent decision to request services through an IEP
 - Date extended IFSP services ended
 - Date of initial IEP development
 - Date of parent consent for initiation of services
 - Date IEP is in effect
- Reason for delay is required if "Date of initial evaluation" is more than 60 days after "Date of parent consent for initial evaluation".
- This child is Eligibility 6. The rest of the IEP would not need to be filled out but an Eligibility 6 Status Report can be printed by accessing the PRINT feature of the IEP.

Date of parent consent for initiation of services

31

Date initial IEP is in effect

31

Is this student transitioning from Infants and Toddlers (Part C) to Preschool (Part B) and receiving services through an IEP?

Yes No

Reason(s) for delay of initial evaluation

If evaluation for child was delayed, indicate reason(s) for delay:

- Parent repeatedly failed or refused to make the child available
- Parent refusal to provide consent caused delay in evaluation or initial services
- Parent requested delay – Parent and IEP team extend the timeframe by mutual written agreement
- School/facility closure
- Inclement weather
- Other

NOTE: Age Group must be selected and Part C to Part B question must be answered above before reasons for delay can be selected

If the parent fails to respond or refuses consent to the initial provision of special education and related services, the public agency shall not provide special education and related services to the student and will not be considered in violation of the requirement to make FAPE available in accordance with 34 CFR §300.

The transition from Part C to Part B for children whose parents chose the Extended IFSP Option prior to age 3 is completed under [Initial Eligibility Student Ages 3-21](#).

- a. At the bottom of the Dates section, choose “Yes” to “Is this student transitioning from Infants and Toddlers (Part C) to Preschool (Part B) and receiving services through an IEP?”
- b. The following date fields should match the dates that were filled in when the child entered Extended IFSP Option and had Initial Eligibility (Prior to Age 3) information entered.
 - Date of parent consent for initial evaluation
 - Date of initial evaluation
 - Date of Parent Consent-Continue Early Intervention Services through an IFSP at age 3
- c. The following date fields **should** be filled in.
 - Date of initial IEP Development
 - Date of parent consent for initiation of services
 - Date initial IEP is in effect
- d. The following date fields **should** be filled in for either “Date Local School System was notified by parent decision to request services through an IEP” OR “Date Extended IFSP services ended”.
 - Date local school system was notified of parent decision to request services through an IEP
 - Date extended ISFP services ended
- e. Reason for delay **should not** be filled in because eligibility determination must be made by age 3 and no later for child to take part in Extended Part C Option.

Dates

Select an age group

INITIAL ELIGIBILITY PRIOR TO AGE 3
 INITIAL ELIGIBILITY FOR STUDENT AGES 3-21

Date of parent consent for initial evaluation

31

Date of initial evaluation

31

Date of Parent Consent-Continue Early Intervention Services through an IFSP at age 3

31

Date local school system was notified of parent decision to request services through an IEP

31

Date extended IFSP services ended

31

Date of initial IEP development

31

Date of parent consent for initiation of services

31

Date initial IEP is in effect

31

Is this student transitioning from Infants and Toddlers (Part C) to Preschool (Part B) and receiving services through an IEP?

Yes No

Reason(s) for delay of initial evaluation

If evaluation was delayed, indicate reason(s) for delay:

- Parent repeatedly failed or refused to make the child available
- Student is enrolled after 60-day timeframe began and prior to determination by LSS. Receiving LSS made sufficient progress to complete the evaluation and parent and LSS agreed to a specific time to complete the evaluation (All conditions must be met)
- Parent requested delay – Parent and IEP team extend the timeframe by mutual written agreement
- School/facility closure
- Inclement weather
- Other

NOTE: Age Group must be selected and Part C to Part B question must be answered above before reasons for delay can be selected

If the parent fails to respond or refuses consent to the initial provision of special education and related services, the public agency shall not provide special education and related services to the student and will not be considered in violation of the requirement to make FAPE available in accordance with 34 CFR §300.

Note: The Date of Initial Evaluation will populate on the Close Record screen as Most Recent Evaluation Date.





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Initial Eligibility Prior to Age 3 with IEP

Initial Eligibility Prior to Age 3-Continue IFSP

Initial Eligibility Student Ages 3-21

Continued Eligibility Data

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Initial Eligibility Ages 3-21

To be used when initial eligibility process **begins** after child's third birthday. For children transitioning from Infant and Toddlers (Part C) to Preschool (Part B), see [Initial Eligibility Prior to Age 3](#).

- a. At the bottom of the Dates section, choose "No" to "Is this student transitioning from Infants and Toddlers (Part C) to Preschool (Part B) and receiving services through an IEP?"
- b. The following date fields **should** be filled in.
 - Date of parent consent for initial evaluation
 - Date of initial evaluation
 - Date of initial IEP development
 - Date of parent consent for initial of services
 - Date of initial IEP is in effect
- c. The following date fields **should not** be filled in.
 - Date of Parent Consent-Continue Early Intervention Services through an IFSP at age 3
 - Date local school system was notified of parent decision to request services through an IEP
 - Date extended IFSP services ended
- d. Reason for delay required if ("Date of initial evaluation" is more than 60 days after "Date of parent consent for initial evaluation").

Dates

Select an age group

INITIAL ELIGIBILITY PRIOR TO AGE 3
 INITIAL ELIGIBILITY FOR STUDENT AGES 3-21

Date of parent consent for initial evaluation

Date of initial evaluation

Date of Parent Consent-Continue Early Intervention Services through an IFSP at age 3

Date local school system was notified of parent decision to request services through an IEP

Date extended IFSP services ended

Date of initial IEP development

Date of parent consent for initiation of services

31

Date initial IEP is in effect

31

Is this student transitioning from Infants and Toddlers (Part C) to Preschool (Part B) and receiving services through an IEP?

Yes No

Reason(s) for delay of initial evaluation

If evaluation was delayed, indicate reason(s) for delay:

- Parent repeatedly failed or refused to make the child available
- Student is enrolled after 60-day timeframe began and prior to determination by LSS. Receiving LSS made sufficient progress to complete the evaluation and parent and LSS agreed to a specific time to complete the evaluation (All conditions must be met)
- Parent requested delay – Parent and IEP team extend the timeframe by mutual written agreement
- School/facility closure
- Inclement weather
- Other

NOTE: Age Group must be selected and Part C to Part B question must be answered above before reasons for delay can be selected

If the parent fails to respond or refuses consent to the initial provision of special education and related services, the public agency shall not provide special education and related services to the student and will not be considered in violation of the requirement to make FAPE available in accordance with 34 CFR §300.

Note: The Date of Initial Evaluation will populate on the Close Record screen as Most Recent Evaluation Date.





search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Initial Eligibility Prior to Age 3 with IEP

Initial Eligibility Prior to Age 3-Continue IFSP

Initial Eligibility Student Ages 3-21

Continued Eligibility Data

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Continued Eligibility

Continued Eligibility is to be selected if there is already an Active IEP. Enter required information and **click the SAVE button**.

Note: The Evaluation Date will populate on the Close Record screen as Most Recent Evaluation Date.



Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Participation Planning

Performance Summary

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Participation

Participation consists of [Participation Planning](#) and [Performance Summary](#) pages.

The screenshot shows the 'Student Compass' interface for a student named Alex Samplea. The page is titled 'Participation Planning' and includes a 'Table of Contents' dropdown menu. The main content area contains a text editor with the following text: 'Record any additional local school system graduation requirements. The Maryland State Board of Education requires students to earn a minimum of 21 credits beyond the 8th grade. requires 4 additional credits: 1 in math and 3 in the student's career pathway. In addition the student must also take the High School Assessments and pass each individual test or earn a combined score of 1602. See page 37 of the Calendar Handbook for more information. The course requirements, passing HSA scores, and other graduation requirements can be found at the website provided.' A link to 'www.marylandpublicschools.org' is provided for state graduation requirements. At the bottom, there is a question 'Graduation requirements explained to parents?' with radio buttons for 'Yes' (selected) and 'No'.



Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Participation Planning

Performance Summary

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Participation Planning

Select the **Participation Planning** from the **IEP Table of Contents** or from the navigation drop-down menu located on each of the IEP section titles to document which assessments the student will take and to document basis for decisions.

The screenshot shows the 'Student Compass' interface for a student named Alex Samplea. The left sidebar contains a navigation menu with 'Participation Planning' highlighted. The main content area shows the 'Table of Contents' with 'Participation Planning' selected. Below this, there is a text area for recording graduation requirements, which contains text about Maryland State Board of Education requirements. At the bottom, there is a question 'Graduation requirements explained to parents?' with radio buttons for 'Yes' and 'No'.



Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Participation Planning

Performance Summary

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Performance Summary

Select the **Performance Summary** IEP Table of Contents or from the navigation drop-down list in the section title located on each of the IEP pages to record most recent state assessment data. The question **"Is the student limited English proficient?"** is a **required** response and is located at the top of the page.

The screenshot shows the 'Student Compass' interface for a student named Alex Samplea. The page is titled 'Performance Summary' and includes a dropdown menu for 'Table of Contents'. A question is asked: 'Is the student limited English proficient?' with radio buttons for 'Yes' and 'No'. Below this, there is a section for 'MMSR' (Maryland Model for School Readiness) Kindergarten Assessment, with a date field set to 31 and radio buttons for 'PROFICIENT', 'IN PROCESS', and 'NEEDS DEVELOPMENT'. The left sidebar shows student information: Grade 7, DOB 01/01/2010, and Case Manager N/A.



Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Academic and Functional Areas Assessed

Area Discussion

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Present Level of Academic Achievement and Functional Performance

Academic and Functional Areas Assessed and Area Discussion questions can be accessed under Present Level of Academic Achievement and Functional Performance from the IEP Table of Contents or from the navigation drop-down list in the section title located on each of the IEP pages.

The screenshot displays the user interface for Alex Samplea's IEP. On the left, a sidebar lists navigation options, with 'Present Levels' selected. The main content area shows a dropdown menu for 'Academic and Functional Areas Assessed'. The dropdown is expanded to show a list of academic areas, each with a 'Write a Goal' button and an 'Edit Goals' button. The areas listed are: Reading Phonics, Reading Fluency, Reading Comprehension, Math Calculation, Math Problem Solving, Written Language Expression, Cognitive, and Organization. Below this list, the 'Behavioral' section is partially visible, showing 'Self-management' with an 'Edit Goals' button.



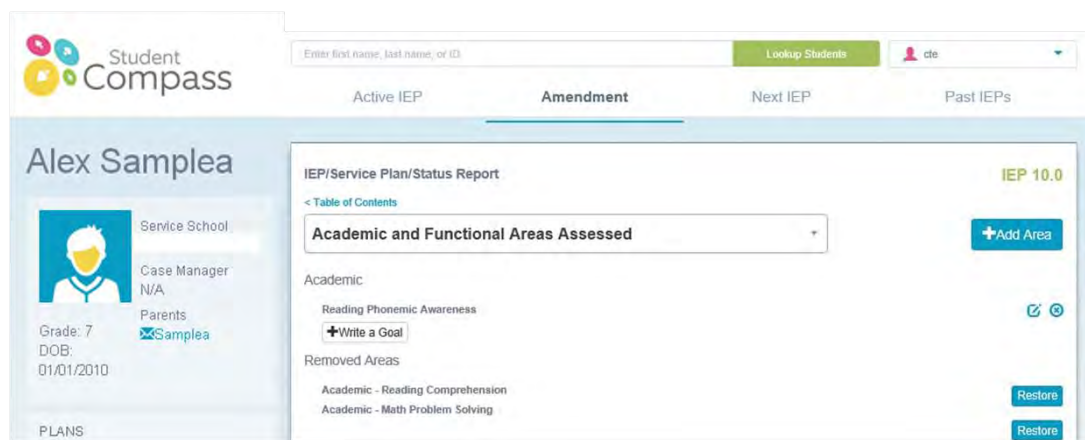
- MD Online IEP User's Guide
- Orientation
- Getting Started
- Locating a Student's Case
- Student Compass: Caseload Level
- Student Compass: Student Level
- Meetings
- IEP Development
- Identifying Information
- Eligibility
- Participation
- Present Levels
- Academic and Functional Areas Assessed
- Area Discussion
- Special Considerations
- Goals
- Services
- LRE and Placement Summary
- Additional IEP Functions
- Transferring and Exiting Students
- Forms and Logs
- Reports
- Additional Case Level Functions
- County Level/Data Manager Functions
- Managing User Accounts
- Editing Demographic Information
- Technical Support & Troubleshooting

Academic and Functional Areas Assessed

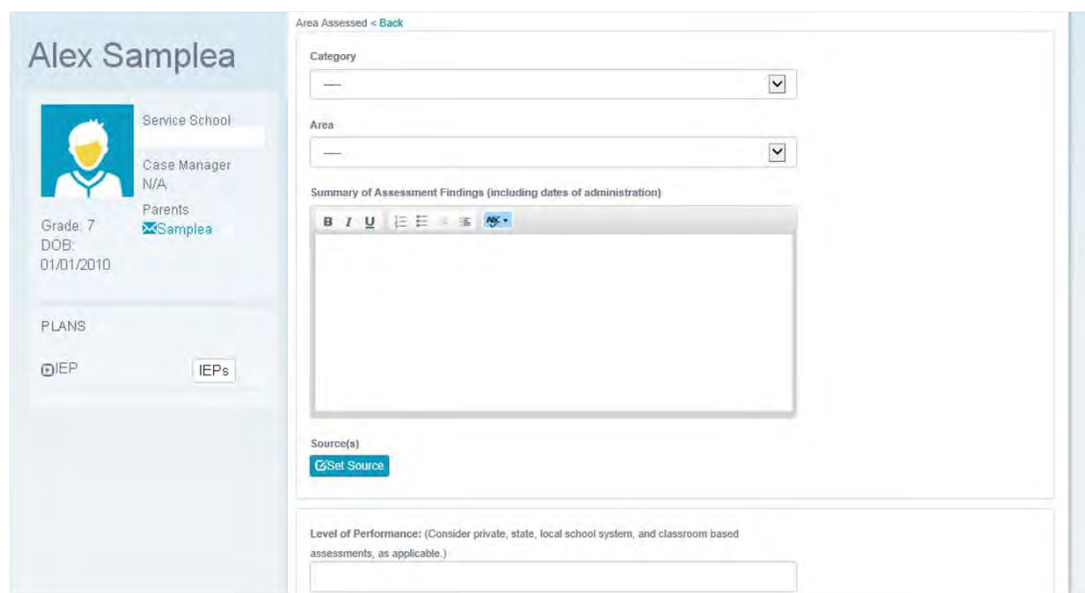
The first step of completing the **Present Level of Academic Achievement and Functional Performance** portion of the IEP is completing **Areas Assessed**.

1. Select **Academic and Functional Areas Assessed** from the IEP Table of Contents or from the navigation drop-down list in the section title located on each of the IEP pages.

The Academic and Functional Area Assessed page will be displayed. To add an Area Areas, click the **Add Area** button.



2. Begin by selecting the appropriate **Category** (i.e., Academic, Health, Physical, and Behavioral.). Then select the appropriate **Area**. For **Areas** not listed, select **Other** and enter the specific area to be addressed in the space provided. The category of "Other" can only be used once. If this is used more than once then the IEP will not pass the close audits. This can be a NOTE.



3. Multiple sources used in the assessment process can be by selecting **Set Source button**, checking the sources and choosing the **Select button** at the bottom of the page. If other is chosen, a textbox will be provided to list any additional assessments not provided in the list.

4. *Does the area impact the student's academic achievement and/or functional performance?* Indicate **Yes** or **No** for this question. If **Yes**, choose how the impact will be addressed in the student's IEP. If **A specific goal aligned to this area of impact** is chosen, the MD Online IEP system will verify that a goal matching the category and area assessed is listed in the goal section. If **Supplementary Aids or Services, Embedded IEP Goals, or Services** is chosen, the system will check that at least one item is included in the matching area of the IEP. **Although one of the choices must be checked, the area can be addressed in as many places in the IEP as needed.**

Source(s)

Level of Performance: (Consider private, state, local school system, and classroom based assessments, as applicable.)

Does this area impact the student's academic achievement and/or functional performance?

Yes No

A specific goal aligned to this area of impact

Supplementary Aids, Services, Program Modifications, and Supports

Embedded IEP Goals

Services

This area impacts academic achievement and/or functional performance but will NOT be addressed by a goal, supplementary aid, or service. (This option is only to be used for Eligibility 2 Service Plans)

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The final option, **This area impacts academic achievement and/or functional performance but will NOT be addressed by a goal, supplementary aid, or service.**, is only available for Eligibility 2, Service Plans.

5. After entering information in all the fields, click the **SAVE button**. The area for which information was entered appears on the Areas Assessed page. Select the **Edit button** to make changes. Select the **Write a Goal button** to be taken to the goal page with the information carried forward, or select the **Add Area button** to enter information for another academic or functional area assessed. Using the **Delete button** will move the information to the bottom of the page and can be restored, if necessary. Once moved to the bottom of the page, the area will not print on the IEP.

Alex Samplea

Service School

Case Manager
N/A

Parents
Samplea

Grade: 7
DOB:
01/01/2010



PLANS



IEP IEPs



< Table of Contents



Academic and Functional Areas Assessed



Academic



Reading Phonics  
+Write a Goal



Reading Fluency  
+Write a Goal



Reading Comprehension  
Edit Goals

Math Calculation  
+Write a Goal



Math Problem Solving  
+Write a Goal

Written Language Expression  
Edit Goals

Cognitive  
+Write a Goal

Organization  
Edit Goals

Behavioral

Self-management  
Edit Goals





Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Academic and Functional Areas Assessed

Area Discussion

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Area Discussion

Answering key **Area Discussion** questions completes the **Present Level of Academic Achievement and Functional Performance**. The final question is provided to document impact of disability for preschoolers. When finished with the narrative responses, select **Save**.

Note: **Student Compass Wizards** are available throughout the MD Online IEP system and provide guidance in completing sections where they are included. Use of the **Wizards** is provided under **Additional IEP Functions in this User Guide**.

Alex Samplea

Service School: [Redacted]
Case Manager: N/A
Parents: [Redacted]
Grade: 7
DOB: 01/01/2010

PLANS: IEP

Area Discussion

What is the parental input regarding the student's educational program?

2014-Ms. Sopher was unable to attend the meeting today. She did report via phone conference that she is concerned about Alex's progress this year and his grades. She is supportive and is glad Alex is in co-taught LA, math, SS, and science classes this year. 2012- Ms. Sopher was unable to attend Alex's annual IEP meeting. She is supportive of his program and was in agreement with the school to place Alex in co-taught merit level classes.

What are the student's strengths, interest areas, significant personal attributes, and personal accomplishments? (Include preferences and interests for post-school outcomes, if appropriate.)

Alex was proficient on both the reading and math MSA in 6th grade when he was provided with his accommodations. Alex is respectful of adults and normally gets along well with his peers. Alex was proficient on both the reading MSA and math MSA in 5th grade when he was provided with his accommodations. Academically, math is a relative strength for him as well. Alex is almost always prepared for class. When teachers work with him



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Special Considerations

Instructional and Testing Accommodations

Supplementary Aids, Services...

Extended School Year (ESY)

Transition

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic

Special Considerations

Five areas of the IEP have been grouped under **Special Considerations and Accommodations**:

- *Special Considerations*
- *Instructional and Testing Accommodations*
- *Supplementary Aids, Services, Program Modifications and Supports*
- *Extended School Year*
- *Transition*

The screenshot shows the 'Student Compass' interface. At the top, there is a search bar with the text 'Enter first name, last name, or ID' and a 'Lookup Students' button. The user is logged in as 'cte_sa'. Below the search bar are tabs for 'Active IEP', 'Amendment', 'Next IEP', and 'Past IEPs'. The main content area is for a student named 'Alex Samplea'. On the left, there is a profile card with a photo placeholder, 'Service School', 'Case Manager N/A', 'Parents Samplea', 'Grade: 7', and 'DOB: 01/01/2010'. Below this is a 'PLANS' section with 'IEP' and 'IEPs' buttons. The main area shows a 'Table of Contents' for 'Special Considerations' with a search bar and a list of items: '2) Special Considerations and Accommodations' (with sub-items: 'Special Considerations', 'Instructional and Testing Accommodations', 'Supplementary Aids, Services, Program Modifications and Supports', 'Extended School Year', 'Transition', 'Transition Activities', 'Agency Linkage') and '3) Goals'. Each item has a share icon on the right.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Special Considerations

Instructional and Testing Accommodations

Supplementary Aids, Services...

Extended School Year (ESY)

Transition

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic

Special Considerations

Tip: Consideration of Communication and Assistive Technology (AT) is required.

1. Select **Special Considerations** from the IEP Table of Contents or from the navigation drop-down list in the section title located on each of the IEP pages. Special Consideration Plans (*Communication, Assistive Technology (AT), Blind or Visually Impaired, Deaf or Hearing Impaired, Behavioral Intervention Plan, and Limited English Proficiency*) will default as Not Considered. To indicate that have been considered, click the **Edit button** and complete the plan.

2. Select the **SAVE button**. Considered plans will appear at the top of the screen under the heading **Considered**.

3. Considered plans can be edited or removed from considered status.



search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Special Considerations

Instructional and Testing Accommodations

Supplementary Aids, Services...

Extended School Year (ESY)

Transition

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic

Instructional and Testing Accommodations

Note: Student Compass Wizards are available throughout the MD Online IEP and provide guidance in completing sections where they are included. Use of the Wizards is provided under [Additional IEP Functions in this User Guide](#).

1. Select **Instructional and Testing Accommodations** from the IEP Table of Contents or from the navigation drop-down list in the section title located on each of the IEP pages.

The screenshot shows the 'Instructional and Testing Accommodations' section for a student named Alex Samplea. The interface includes a sidebar with navigation options and a main content area with a dropdown menu and a table of accommodations.

Presentation Accommodations		Conditions for Use In Instruction and Assessment
Visual Presentation Accommodations		
<input type="checkbox"/> 1-A: Large Print		I, A
<input type="checkbox"/> 1-B: Magnification Devices		I, A
<input type="checkbox"/> 1-C: Interpretation/Transliteration for the Deaf and Hard of Hearing		I, A
Tactile Presentation Accommodations		
<input type="checkbox"/> 1-D: Braille		I, A
<input type="checkbox"/> 1-E: Tactile Graphics		I, A ¹
NOTE: For purpose of State assessments, any tactile graphics needed are included with the Braille version of the test.		
Auditory Presentation Accommodations		
<input type="checkbox"/> 1-F: Human Reader or Audio Recording for Verbatim Reading of Entire Test		I, A ²
<input checked="" type="checkbox"/> 1-G: Human Reader or Audio Recording of Selected Sections of Test		I, A ²
<input type="checkbox"/> 1-H: Audio Amplification Devices		I, N/A

2. If **Instructional and Testing Accommodations** are required, complete the relevant **Presentation, Response, Timing and Scheduling, and Setting Accommodations**. Document the basis for decision for all choices to indicate how the accommodation will be administered.

3. Click the **SAVE** button and a notification that the information has been successfully saved will appear.

4. If no **Instructional and Testing Accommodations** are required, select check box "Instructional and testing accommodations were considered and no instructional testing accommodations are required at this time" at the bottom of the screen. A "discussion to support decisions" will become available. Enter text and click the **SAVE** button.

The screenshot shows a notification box at the bottom of the screen with the following text:

Instructional and testing accommodations were considered and no instructional and testing accommodations are required at this time



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Special Considerations

Instructional and Testing Accommodations

Supplementary Aids, Services...

Extended School Year (ESY)

Transition

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic

Supplementary Aids, Services, Program Modifications and Supports

1. Select **Supplementary Aids, Services, Program Modifications and Supports** from the IEP Table of Contents **or** from the navigation drop-down list in the section title located on each of the IEP pages.

2. Choose the appropriate option:

- A. If *Supplementary Aids, Services, Program Modifications and Supports were considered and are required at this time* is chosen, enter **Documentation to Support Decision(s)**, and click the **SAVE** button. Then select **Add Supplementary Aids, Services, Program Modifications and Supports** button.
- B. If *Supplementary Aids, Services, Program Modifications and Supports were considered and none are required at this time* is chosen enter **Discussion to Support Decision(s)**, and click the **SAVE** button.

3. For each **Supplementary Aid, Service, Program Modification or Support**, enter the required information, and select Save. "Service nature" reflects indirect services as well as aids, program modifications and supports.

Alex Samplea



Service School

Case Manager

N/A

Parents

Samplea

Grade: 7

DOB:

01/01/2010

PLANS

IEP

IEPs

Supplementary Aids, Services, Program Modifications & Supports [Back](#)

Service Category

Instructional Support(s)

Nature of Service

Provide assistance w/organization

Anticipated Frequency

Other

Please Specify

As needed

Begin Date

02/12/2014

31

End Date

02/11/2015

31

Duration in Weeks

36

Primary Provider

Special Education Classroom Teacher

Other Provider(s)

Information

Technical Support & Troubleshooting



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Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Special Considerations

Instructional and Testing Accommodations

Supplementary Aids, Services...

Extended School Year (ESY)

Transition

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic

Extended School Year (ESY)

Note: Extended School Year (ESY) decision can be deferred to a later date, if needed. The page can be completed through an amendment to document ESY decision making.

1. Select **Extended School Year (ESY)** from the IEP Table of Contents or from the in the section title located on each of the IEP pages.
2. Select **YES** or **NO** for each question and complete **Discussion to support decisions** for each question.
3. After considering the questions, select **YES, student is eligible for ESY service** or **NO, student is not eligible for ESY service**.
4. Click the **SAVE** button.

The screenshot shows the user interface for the 'Extended School Year' decision. On the left, a sidebar displays the student's profile for Alex Samplea, including their service school, case manager (N/A), parents (Samplea), grade (7), and date of birth (01/01/2010). Below the profile are buttons for 'PLANS' and 'IEPs'. The main content area features a 'Table of Contents' dropdown menu with 'Extended School Year' selected. Below this is a text box explaining that the IEP team should determine if factors will jeopardize the student's ability to benefit from the regular school year. The form includes a section for 'ESY Decision Deferred' with radio buttons for 'Yes' and 'No'. A question asks, '1) Does the student's IEP include annual goals related to critical life skills?'. Below the question is another 'Yes/No' selection. A 'Discussion to support decision' section contains a rich text editor with the text: 'Alex does not have critical life skills on his IEP. He is accessing the essential curriculum with his peers when provided with accommodations and supplementary aids and services.'



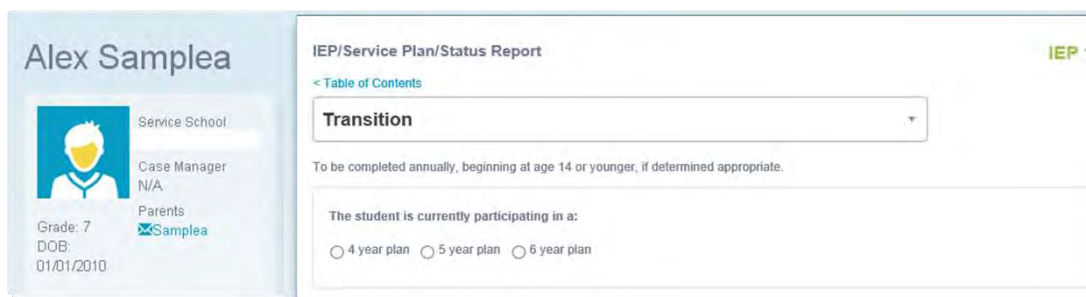
- MD Online IEP User's Guide
- Orientation
- Getting Started
- Locating a Student's Case
- Student Compass: Caseload Level
- Student Compass: Student Level
- Meetings
- IEP Development
- Identifying Information
- Eligibility
- Participation
- Present Levels
- Special Considerations
 - Special Considerations
 - Instructional and Testing Accommodations
 - Supplementary Aids, Services...
 - Extended School Year (ESY)
- Transition**
- Goals
- Services
- LRE and Placement Summary
- Additional IEP Functions
- Transferring and Exiting Students
- Forms and Logs
- Reports
- Additional Case Level Functions
- County Level/Data Manager Functions
- Managing User Accounts
- Editing Demographic

Transition

Transition is divided into three sections: **Transition**, **Transition Activities**, and **Agency Linkage**. For a student who will be 14 years or older through the data date range of the current IEP, all three sections are **required** to be completed.

Note: **Wizards** are available throughout the MD Online IEP and provide guidance in completing sections where they are included. Use of the **Wizards** is provided under [Additional IEP Functions in this User Guide](#).

1. Select **Transition** from the IEP Table of Contents or from the navigation drop-down list in the section title located on each of the IEP page. Complete the **Transition** screen with appropriate information. The **selection of 4 year, 5 year, or 6 year plan in which the student is participating**, **Graduation Plan Date of Annual Student Interview** and an **Employment Goal** (outcome) are required as well as either a **Training** or **Educational Goal** (outcome).



2. Select **Transition Activities** from the IEP Table of Contents or from the navigation drop-down list in the section title located on each of the IEP page. **Transition Activities** can be added to the next screen by choosing **Add Transition Activity**. Complete information and click the **SAVE** button.



4. Select **Agency Linkage** from the IEP Table of Contents or from the navigation drop-down list in the section title located on each of the IEP page. Complete as appropriate and document decision and click the **SAVE** button.

Information

Technical Support & Troubleshooting

Alex Samplea

Service School
Case Manager: N/A
Parents: Samplea

Grade: 7
DOB: 01/01/2010

PLANS
IEP IEPs

< Table of Contents

Agency Linkage

	The student has been referred to:	Agency Representatives were invited to the IEP Team meeting:	Anticipated Services in Transition:
Division of Rehabilitation Services (DORS):	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	<input type="radio"/> Yes <input type="radio"/> No
Developmental Disabilities Administration (DDA):	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	<input type="radio"/> Yes <input type="radio"/> No
Mental Hygiene Administration (MHA):	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	<input type="radio"/> Yes <input type="radio"/> No

Discussion to support decision

B I U [Rich Text Editor]

Note: Information regarding the student's graduation plan as a 4, 5 or 6 year plan is a required element and part of the IEP audit in order to close a draft IEP.





MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload
LevelStudent Compass: Student
Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Tracking Progress on Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting
Students

Forms and Logs

Reports

Additional Case Level
FunctionsCounty Level/Data Manager
Functions

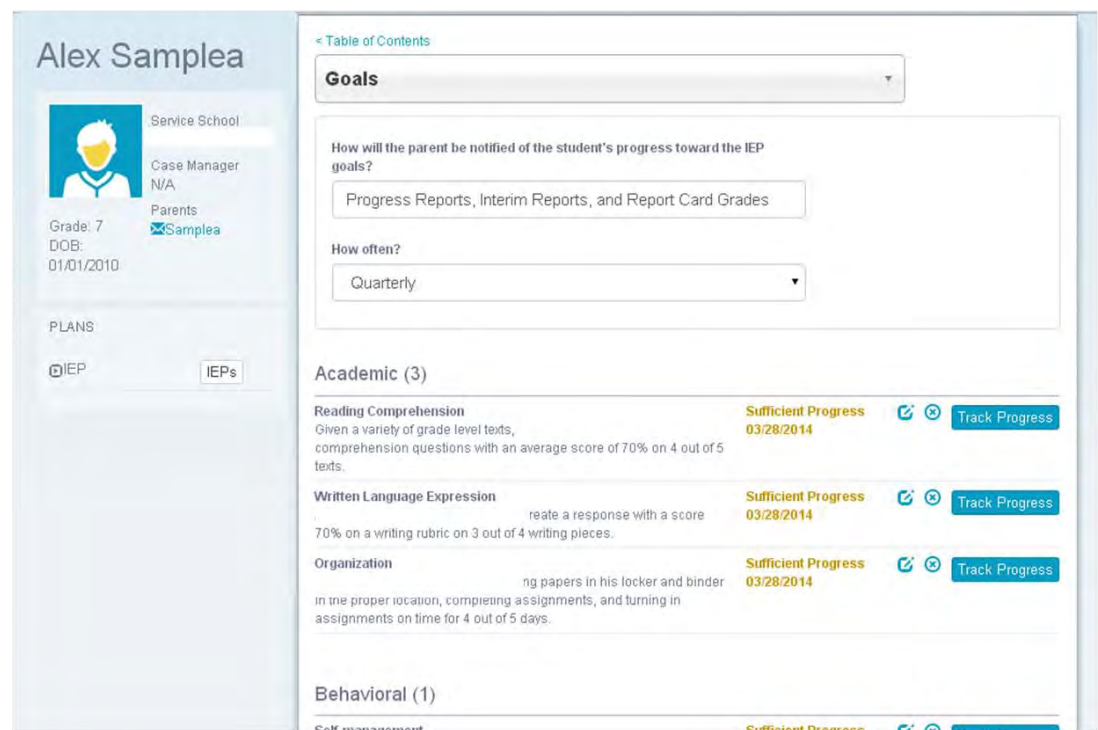
Managing User Accounts

Editing Demographic
InformationTechnical Support &
Troubleshooting

Goals

Goals can be added, deleted, or edited and Progress on goals can be documented from here. Once an IEP has been closed, goals can no longer be added, deleted or edited.

1. **Select Goals** from the IEP Table of Contents or from the navigation drop-down list in the section title located on each of the IEP page.
2. Complete the notification method: *How will the parents be notified of the student's progress toward the IEP goals? How often?* Click **Save Notification Method** button to be notified that the selections have been saved. This information will apply to ALL IEP Goals.



Alex Samplea

Service School
Case Manager
N/A
Parents
Samplea

Grade: 7
DOB:
01/01/2010

PLANS
IEP IEPs







< Table of Contents

Goals



How will the parent be notified of the student's progress toward the IEP goals?
Progress Reports, Interim Reports, and Report Card Grades

How often?
Quarterly

Academic (3)

Reading Comprehension Given a variety of grade level texts, comprehension questions with an average score of 70% on 4 out of 5 texts.	Sufficient Progress 03/28/2014	  Track Progress
Written Language Expression Create a response with a score 70% on a writing rubric on 3 out of 4 writing pieces.	Sufficient Progress 03/28/2014	  Track Progress
Organization Organizing papers in his locker and binder in the proper location, completing assignments, and turning in assignments on time for 4 out of 5 days.	Sufficient Progress 03/28/2014	  Track Progress

Behavioral (1)

Self-management	Sufficient Progress	  Track Progress
------------------------	----------------------------	---

3. To add a goal, select the **Add Goal** button to display the Add Goal page.

4. Choose a **Category** and **Area** to match an area assessed within the [Present Level of Academic Achievement and Functional Performance section of the User Guide](#). Assessment information from there will appear as a *Description of the area affected by disability* to assist with writing a goal to match the needs identified in the assessments.

Tip: Goals can be accessed from the **Area Assessed** screen to enter a goal that matches the **Category** and **Area** assessed.

Note: If a goal is entered for an area assessed not yet completed the final audit will require a **Category** and **Area** be completed in **Areas Assessed** that matches the **Category** and **Area** of the goal.

5. Enter the goal in the **Goal text field**.

6. Enter a date in the **By date field** to indicate the date by which the student is target to achieve this goal.

7. Select an option from the **Evaluation Field** for how the goal will be evaluated.

8. Select the prescribed change from the options in the **With field**. Enter the details to support the prescribed change chosen.

Enter the date in the **Target Date field** for when the goal will be reached. Enter the date in the Start Date field for when the goal will initiate.

9. If the student is eligible for **ESY** and this goal will be included in those services, answer **YES to ESY Goal?**

10. Click the **SAVE button**. After clicking the **SAVE button**, the Goal page will be displayed and the following options will appear: Edit or delete the goal. Editing the goal will allow for objectives to be added and to align the goal with Maryland's College and Career-Ready Standard. Also, track progress, or add another goal are options.

11. To add objectives, click the edit button on the Goal page next to the goal that is in need of objectives. Click the **Add Objective button** in the Objectives section to enter the associated objective in the **Add Objective page**. If additional objectives are associated with the goal, click the **Add Objective button** to add additional objectives. Objectives can be modified by clicking the **Edit button** from the Goal page.

12. If the IEP goal is **Academic**, then complete the information in the Alignment section. Select the Subject area, Grade, and Strand to see the list of **Maryland College and Career-Ready Standards**. Select the Maryland's College and Career-Ready Standards that the goal supports.

Note: By linking the goal to **Maryland's College and Career-Ready Standards**, additional reporting capabilities can be gained to provide insight and assist with students making progress towards reaching IEP goals.

13. To add progress notes to the goal, choose **Track Progress** next to the goal to be monitored in a closed IEP or IEP Amendment. Add information and click the **SAVE button**. Once two progress updates are made a spark chart will appear on the Goals and Monitoring page. For more information about printing goal progress report, see Print IEP or Progress Report on IEP Goals.

Note: Every goal must have at least **one objective** to support it.



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Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Tracking Progress on Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Tracking Progress on IEP Goals

Goals are listed according to the category and area assessed. **After a Goal is saved**, buttons appear to **Edit the Goal** and to **Delete the Goal**. After the IEP is closed, buttons to View the goal, objectives and alignment and Track Progress are available.

Student Progress can be entered from the **Goal page in the IEP section** or the **Monitoring page in the Student Compass section**. The process to add progress on an IEP is the same from the Monitoring and Goal page.

To enter progress on and IEP goal follow these steps:

1. Identify the goal that is to be updated, click the **Track Progress button** next to the goal.
2. The **Track Progress page** will be displayed with the goal and all of its objectives.
3. **Enter all necessary information** to document student progress toward this IEP goal. Click the **SAVE button**.

Once the progress has been saved, the Goal page will be displayed reflecting the most recent updates on progress for the goal and the date of the last progress update. The Monitoring page will be updated to reflect the most recent progress for the goal and the date of the last progress update.

If the goal has a value in the "With" section besides other, and there are 2 progress updates then a graphical display of the goal progress will be displayed on the Monitoring and IEP Goals pages.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

Adding a Service

Service Category and Nature

Service Description

Edit/Delete Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support &

Services

Select **Services** from the IEP Table of Contents or from the navigation drop-down list in the section title located on each of the IEP pages to enter *Special Education Services, Related Services and Career and Technology Services*. Each **Category** includes a list of **Service Natures** to specify the type of service to be documented.



search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

Adding a Service

Service Category and Nature

Service Description

Edit/Delete Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

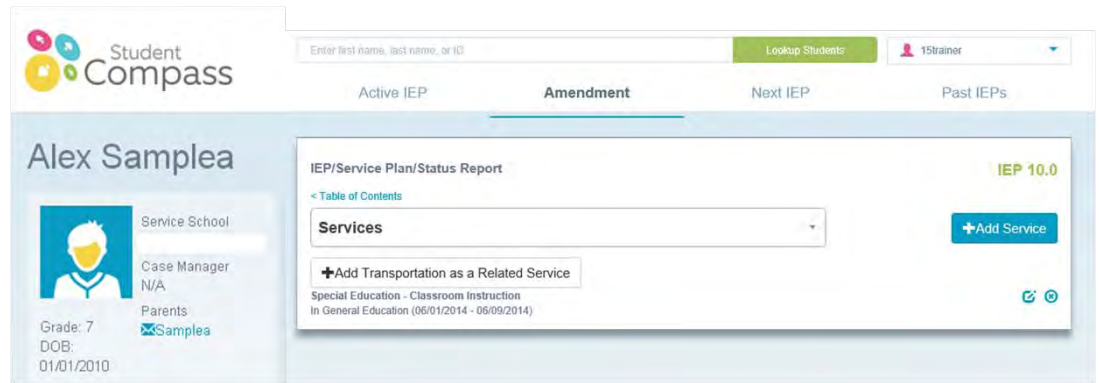
Managing User Accounts

Editing Demographic Information

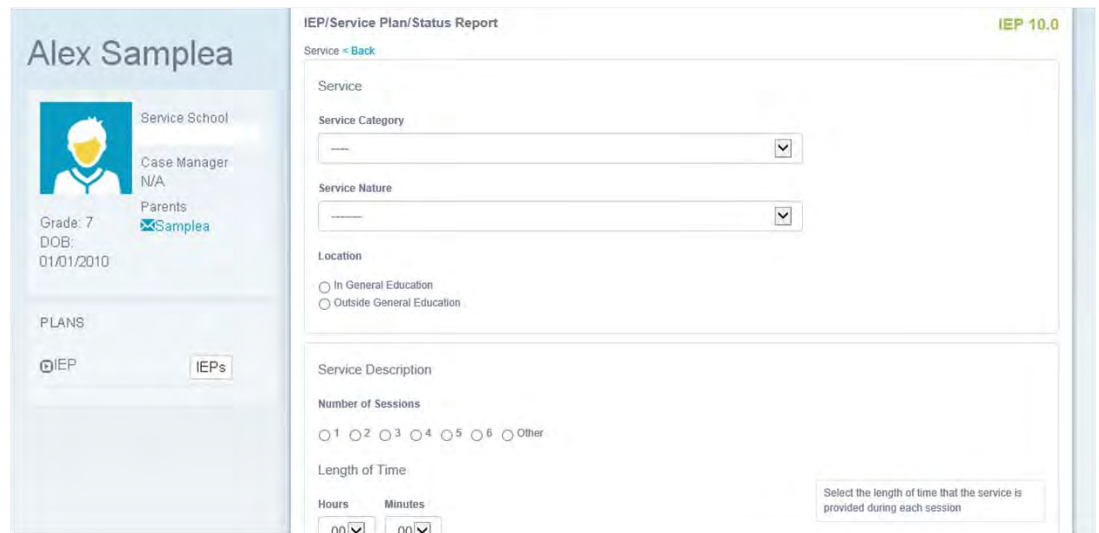
Technical Support &

Adding a Service

Add services to a student's case by selecting **Services** from the IEP Table of Contents or from the navigation drop-down list in the section title located on each of the IEP pages to display the Services page. Click the **Add Service** button.



The screen will refresh and will look like the **Add New Service** page below.



Tip: For 11 or 12 month students, or for students who have different service delivery models based on school schedule (block scheduling, for example), it can be helpful to list the same service more than once to stagger beginning and ending dates.

For example, a high school student may receive 10 hours a week of special education instruction in the fall semester (August-December), and 5 hours a week of special education instruction in the spring semester (January-June). In this case, Special Education Instruction would need to be entered twice with details specific to each semester. The same would hold true of a summer sessions (11th or 12th month, but not considered ESY) if not the same as services offered during the school year.

Each service entry will print/list separately on the IEP.

ESY services can be added at the bottom of the screen if "Is this an ESY Service?" is answered YES.

Special Transportation

If **Transportation** is indicated as a related service, it can be added on the **Services** section of the IEP. Begin by choosing **Add Transportation as a Related Service** button on the **Services** screen. Complete the data screen and click on the **Save** button. Transportation can be added for ESY by answering YES to the question "Is this an ESY service?" at the bottom of the screen.

The screenshot shows the Student Compass interface for an IEP/Service Plan/Status Report for a student named Alex Samplea. The interface includes a navigation bar with 'Active IEP', 'Amendment', 'Next IEP', and 'Past IEPs'. The 'Amendment' tab is selected. The student's profile information is displayed on the left, including a placeholder for a photo, 'Service School', 'Case Manager N/A', 'Grade: 7', 'DOB: 01/01/2010', and 'Parents: Samplea'. The main content area shows the 'IEP/Service Plan/Status Report' for 'IEP 10.0'. A 'Services' dropdown menu is open, showing the option '+Add Transportation as a Related Service'. Below this, there are two service entries: 'Special Education - Classroom Instruction In General Education (05/01/2014 - 05/09/2014)' and 'Related Services - Speech/Language Therapy as a Related Service In General Education (08/07/2014 - 05/07/2015)'. An '+Add Service' button is visible in the top right of the services section.





MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

Adding a Service

Service Category and Nature

Service Description

Edit/Delete Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

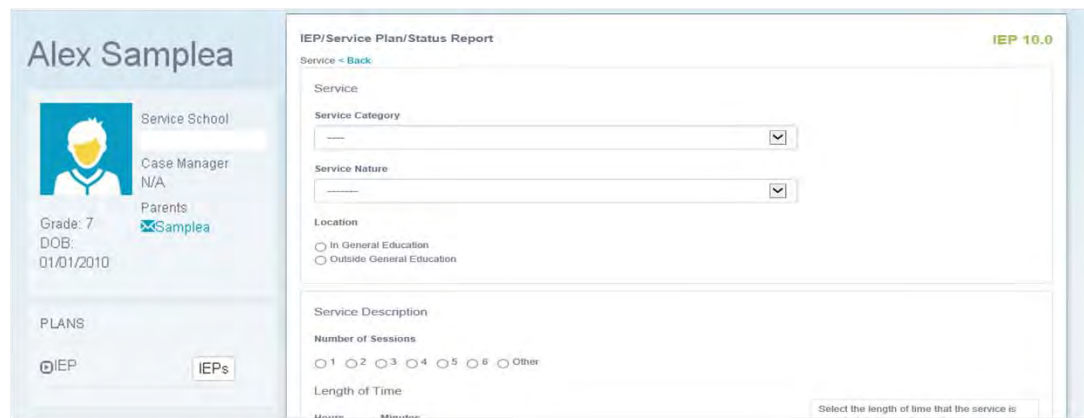
Managing User Accounts

Editing Demographic Information

Technical Support &

Service Category and Nature

1. On the Add Services page, select a **Service Category** from the drop down menu (i.e. *Special Education, Career and Technology Education, Related Services*).



The screenshot shows the 'IEP/Service Plan/Status Report' interface for a student named Alex Samplea. The form is titled 'Service Category and Nature' and includes the following fields:

- Service Category:** A dropdown menu with a downward arrow.
- Service Nature:** A dropdown menu with a downward arrow.
- Location:** Radio buttons for 'In General Education' and 'Outside General Education'.
- Service Description:** A section with 'Number of Sessions' (radio buttons for 1, 2, 3, 4, 5, 6, Other) and 'Length of Time' (radio buttons for Hour, Minute).

2. Select a **Service Nature** from the drop-down list after selecting a Service Category.

Note: The options available in the Service Nature field are dependent upon the selection made in the Service Category field and will not appear until a Service Category selection has been made.

3. Indicate the **Location**, in or outside general education, for each service from the options in the **Location** field.

4. After clicking the **SAVE** button, a notification that the information has been successfully saved will appear, and the service will be listed on the Services page.

Note: Services must include at least one primary **Service Nature** under **Service Category: Special Education** such as, *Classroom Instruction, Physical Education, Speech/Language Therapy, or Travel Training*. **Speech/Language Therapy** can be indicated as the primary service or a related service.



- MD Online IEP User's Guide
- Orientation
- Getting Started
- Locating a Student's Case
- Student Compass: Caseload Level
- Student Compass: Student Level
- Meetings
- IEP Development
- Identifying Information
- Eligibility
- Participation
- Present Levels
- Special Considerations
- Goals
- Services
 - Adding a Service
 - Service Category and Nature
 - Service Description**
 - Edit/Delete Services
- LRE and Placement Summary
- Additional IEP Functions
- Transferring and Exiting Students
- Forms and Logs
- Reports
- Additional Case Level Functions
- County Level/Data Manager Functions
- Managing User Accounts
- Editing Demographic Information
- Technical Support &

Service Description

Each service is further defined by *Location, Number of Sessions, Length of Time, Frequency, Date Range, Duration, and Provider(s)*.

1. **Location:** Indicate whether the service will be provided in or outside general education
2. **Number of Sessions:** Number of Session is required for any Related Service. However, in order to have the system accurately calculate the Time Outside General Education on the Least Restrictive Environment page, Special Education Services should also indicate the Number of Sessions.
3. **Length of Time:** Indicate the number of hours and/or minutes for each session to be provided.
4. **Frequency:** This is taken into consideration when calculating the percentage of the school day the student is in general education.
5. **Service date:** These dates record the date range the service will be provided. See Note below for additional information.
6. **Providers:** Providers can include anyone who will be responsible for the delivery of the service.

Answer the **ESY** question at the bottom of the screen. If **YES** is chosen, the screen will expand to enter ESY service information.

Troubleshooting

Note: In certain cases, it may be helpful to list the same service more than once to stagger beginning and ending dates.

For example, a high school student may receive 10 hours a week of special education instruction in the fall semester (August-December), and 5 hours a week of special education instruction in the spring semester (January-June). In this case, Special Education Instruction would need to be entered twice with details specific to each semester.

Tip: It can be easier to complete service provision details in the following order: Number of Sessions, Service Time, Frequency. Example: Two 30 minute sessions, weekly.



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Maryland State Department of Education
Maryland Online IEP
 MSDE Division of Special Education and Early Intervention Services

MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

Adding a Service

Service Category and Nature

Service Description

Edit/Delete Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support &

Edit/Delete Services

After creating and successfully saving a Service, it will be displayed on the **Services page**. Each service will be listed separately and will indicate whether it is provided In or Outside General Education. There is an option to **Edit/Delete an existing Service** or to **Add another Service**.

Alex Samplea

Service School

Case Manager N/A

Parents Samplea

Grade: 7
DOB:

Services

- Special Education - Classroom Instruction
Outside General Education (02/12/2014 - 02/11/2015)
- Special Education - Classroom Instruction
In General Education (02/12/2014 - 02/11/2015)

Student Compass

Enter first name, last name, or ID

Lookup Students

1 Strainer

Active IEP | Amendment | Next IEP | Past IEPs

Alex Samplea

Service School

Case Manager N/A

Parents Samplea

Grade: 7
DOB: 01/01/2010

IEP/Service Plan/Status Report

IEP 10.0

Services

+Add Service

+Add Transportation as a Related Service

- Special Education - Classroom Instruction
In General Education (05/01/2014 - 06/09/2014)
- Related Services - Speech/Language Therapy as a Related Service
In General Education (08/07/2014 - 05/07/2015)



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Calculating Time in General Education

Service Managing County

Child Count Eligibility Codes

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

LRE and Placement Summary

The **Least Restrictive Environment (LRE) Decision Making and Placement Summary** page contains many elements that documents the student's special education program.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Calculating Time in General Education

Service Managing County

Child Count Eligibility Codes

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Calculating Time in General Education

On the **Least Restrictive Environment (LRE) Decision Making and Placement Summary** page, complete the time fields:

1. Enter the hours and minutes in a school week. Use 00 when no hours or minutes are indicated.
2. Enter the time for outside of General Education. Time can be entered manually or the system can calculate total service hours outside of general education. If the **Update From Service Time** button is utilized, total time from all services being delivered outside of general education from the **Services** page will be entered here.

Note: This calculation may not be accurate if the *Number of Sessions* under *Classroom Instruction* for any of the services added is not indicated. A popup window will appear when using the *Update from Service Time* button cautioning that the time will calculate properly **ONLY** if the number of sessions was indicated on the **Services** page.

Note: All time fields must be completed. For example, if no time is spent "Outside of General Education", hours and minutes must be indicated by a series of zeros (00) to complete the calculation accurately.

3. Utilizing the **Calculate** button will automatically subtract *Total time outside of General Education* from *Total time in the school week* to calculate *Total time in General Education*. Alternatively, the *Total time in General Education* can be entered manually. In addition, a percentage of the day the student is inside general education per day to assist with choosing the correct *Special Education Placement* code.

4. Choose the correct **Age** group to produce a drop-down list of *LRE Placement Codes/descriptions*.

Total time outside of General Education

Hours/Week: Minutes/Week:

Total time in General Education

Hours/Week: Minutes/Week:

Age

Special education placement (ages 3-5)
 Special education placement (ages 6-21)

INSIDE GENERAL EDUCATION (80% or more)
 INSIDE GENERAL EDUCATION (40% - 79%)
 INSIDE GENERAL EDUCATION (less than 40%)
 PUBLIC SEPARATE DAY SCHOOL
 PRIVATE SEPARATE DAY SCHOOL
 PUBLIC RESIDENTIAL FACILITY
 PRIVATE RESIDENTIAL FACILITY
 HOMEBOUND
 HOSPITAL
 CORRECTIONAL FACILITIES
 PARENTALLY PLACED IN PRIVATE SCHOOLS





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Calculating Time in General Education

Service Managing County

Child Count Eligibility Codes

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Service Managing County

In cases where a nonpublic student is in an out of county living arrangement the MD Online IEP system will be able to grant three groups of users access to view and edit a case:

- o Residence County and Residence School users
- o Nonpublic Service School users
- o Service Managing County users

An example of a student receiving services through a nonpublic school in an out of county living arrangement might be:

- Student's parents address is in Prince George's County
- Student lives at a group home in Washington County and attends THE JEFFERSON SCHOOL in Frederick County

While attending the Jefferson School, the Prince George's County student's case is being managed by Washington County. To allow the three agencies to access the student's IEP through the MD Online IEP, changes should be made to the Edit Demographic screen and the LRE and Placement Summary screen of the IEP:

Edit Demographics screen:

LRE and Placement Summary screen:

SSIS Residence County
 Carol Anne

SSIS Residence School
 Public Private

Public Schools
 Carol Anne Elementary

SSIS Service County
 Carol Anne

SSIS Service School
 Public Private

Public Schools
 Carol Anne Elementary

Residence County: Carol Anne (This is the LSS claiming the student for child count)

Residence School: Carol Anne Elementary

The option to indicate the Service Managing County will only be available if the Service County and School is a nonpublic school.

Note: If the Service Managing County is the same as the Resident County, there is no need to edit the field. The program will default to the Resident County indicated for the student.

For more detailed information about this function, see MD Online IEP v10 (July 1, 2014) - [Service County and Service School Handling Changes for Nonpublic Students](#).





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Calculating Time in General Education

Service Managing County

Child Count Eligibility Codes

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Child Count Eligibility Codes

Select one of the following **Child Count Eligibility Codes**:

1. Eligible student with a disability served in a public school or placed in a nonpublic school by the public agency to receive FAPE (Free Appropriate Public Education). This will create an IEP.
2. Eligible parentally placed private school student with a disability receiving special education and/or related service(s) through a service plan from the public agency. This will create a Service Plan.
3. Eligible parentally placed private school student with a disability NOT receiving service from the public agency. This will create an Eligibility 3 Status Report.
4. Eligible public school student with a disability not receiving services due to parent refusal of initial services. This will create an Eligibility 4 Status Report.
6. Eligible student with a disability prior to age 3. Parent Consent-Continue Early Intervention Services through an IFSP. This will create an Extended Individualized Family Service Plan (IFSP) Option Report.



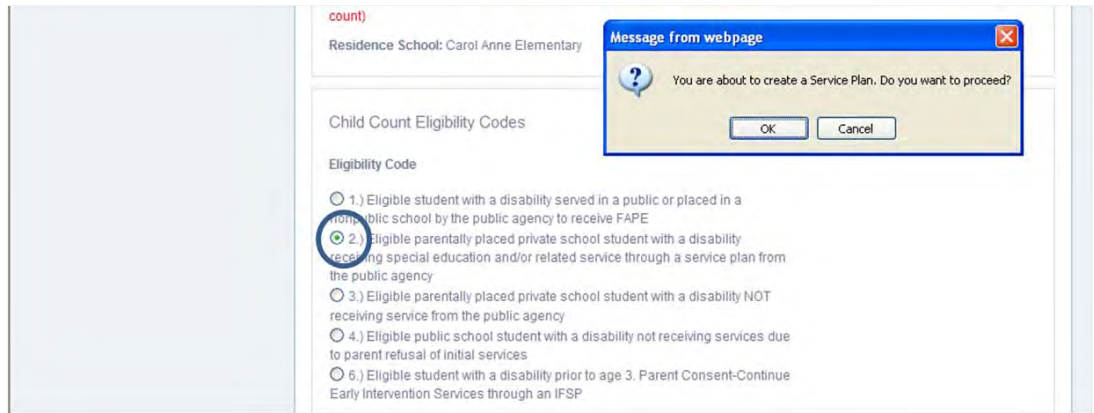
Tip: The **Child Count Eligibility Codes** determine whether the document will print as an **IEP, Service Plan, or Eligibility 3, 4 or 6 Status Report**. For additional information, see **Additional IEP Functions**.

Service Plans

The MD Online IEP can also create a Service Plan or an Eligibility 3, 4 or 6 Status Report.

Creating a Service Plan

The creation of the Service Plan is made by selecting **Child Count Eligibility Code 2** on the **LRE page**. This can be done at any time during the development of the **Service Plan**.



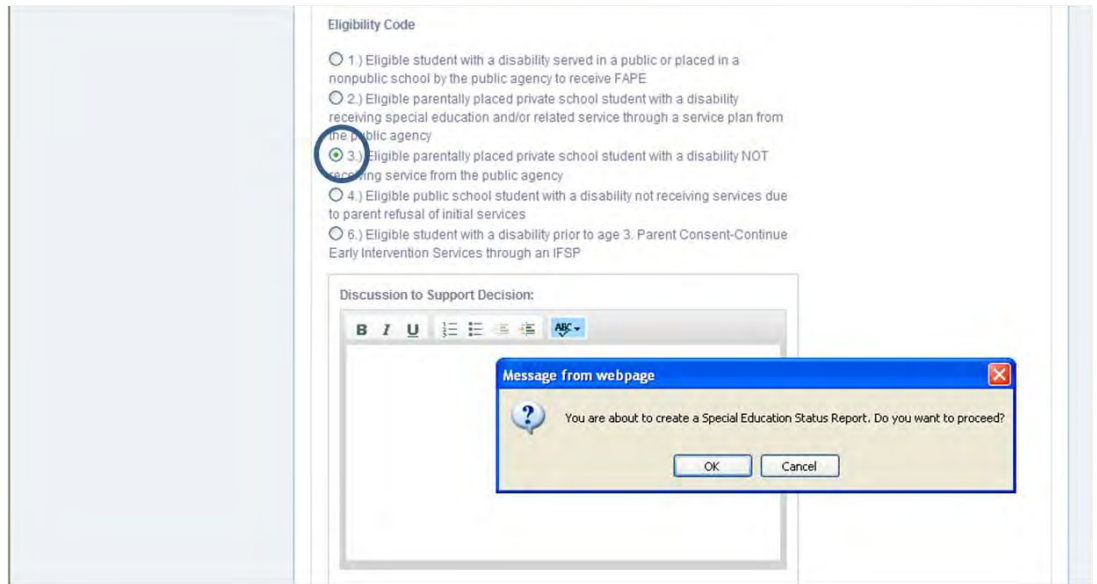
Once a code is selected, a dialog box will appear to indicate that a **Service Plan** is going to be created. Click the OK button to proceed.

On the **Print Selection Screen**, note that a reduced number of section options for printing are available.



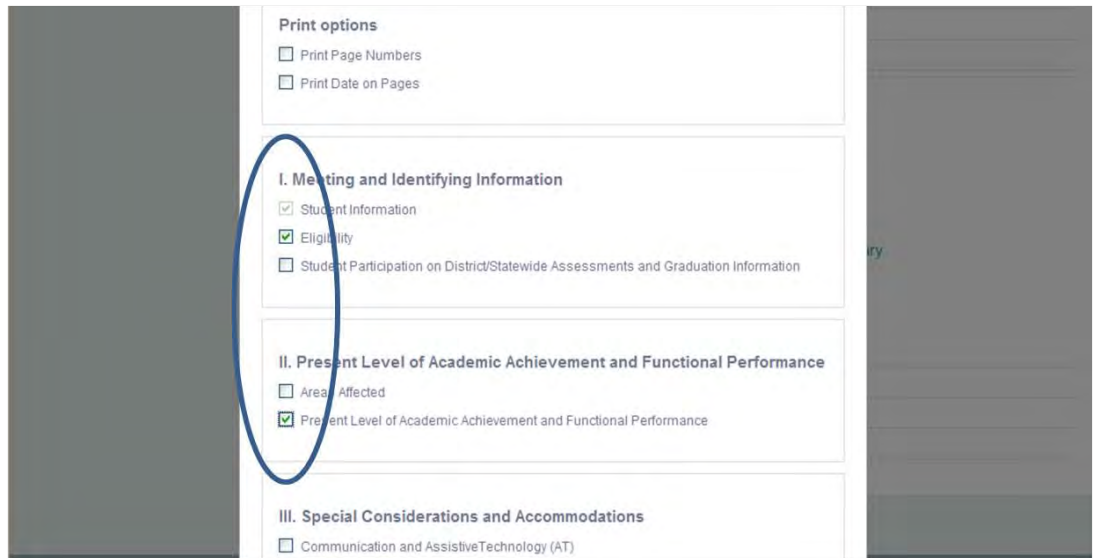
Eligibility Status Reports

The creation of the **Eligibility 3 or 4 Status Report** is made by selecting **Child Count Eligibility Code 3 or 4** on the **LRE** page. This can be done at any time during the development of the **Eligibility 3 or 4 Status Report**.



Once you select that code, the tool will remind you that you are creating an **Eligibility 3 or 4 Status Report**. Select **OK** to proceed.

On the **Print Selection Screen**, you will note that you have a reduced number of section options for printing.





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site

MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Student Compass Wizards

Copy from Active IEP

Assign Team Members

Print IEP

Audit IEP

Close Record

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Additional IEP Functions

In addition to completing the IEP document, the MD Online IEP system offers:





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Student Compass Wizards

Copy from Active IEP

Assign Team Members

Print IEP

Audit IEP

Close Record

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Student Compass Wizards



The MD Online IEP system provides optional embedded professional development modules to assist in completing certain elements of the IEP document. The Wizards are intended to provide "just in time, just for me" support by guiding the user through thoughtful questions and considerations to complete a section of the IEP. The features that make the Wizards unique include reference to IDEA, linkage to the State Curriculum Standards, downloadable resources, and the ability to access support anytime and anywhere via the Internet.

The Wizards guide users through the processes of:

- Preparing discussion statements (Area Discussion) of the Present Level of Academic Achievement and Functional Performance;
 - **Present Level Wizard**
- Writing measurable annual goals that align with Maryland's State Curriculum;
 - **Goal Wizard**
- Selecting instructional and testing accommodations;
 - **Accommodations Wizard**
- Considering assistive technology; and
 - **Assistive Technology Wizard**
- Planning for postsecondary transition.
 - **Secondary Transition Wizard**

Components of Student Compass Wizards

Each Wizard contains a **Get Started** screen to provide background information from IDEA and COMAR regarding the purpose of the IEP element and an overview of what is required. Each Wizard, also known as a procedural facilitator, contains links to associated documents found on the internet, a link to the Searchable State curriculum and additional checklists that may be helpful.

Editing Demographic Information

Technical Support & Troubleshooting

This application was developed and produced by the MSDE, Division of Special Education/Early Intervention Services, in collaboration with the Johns Hopkins University/Center for Technology in Education. IDEA Part B Grant #H0270900035A is funded by the U.S. Department of Education, Office of Special Education and Rehabilitative Services. The views expressed herein do not necessarily reflect the views of the U.S. Department of Education or any other federal agency and should not be regarded as such. The Division of Special Education/Early Intervention Services received funding from the Office of Special Education Programs, Office of Special Education and Rehabilitative Services, U.S. Department of Education.

Navigation through the Wizard is done using the tabs located at the top of the screen. Each screen contains suggested questions, considerations and tips to assist in completing that element of the IEP item. Items are only suggested and it is not necessary to answer every question or consideration to complete the section. On the right side of the screen are text boxes to use while working through the Wizard. On the final screen of the Wizard, there is a **Save and Finish** button. Once selected, all text provided in the Wizard will automatically transfer to the appropriate field on the IEP program. These fields are editable from the IEP program, and it is not necessary to access the Wizard to make edits.



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Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Student Compass Wizards

Copy from Active IEP

Assign Team Members

Print IEP

Audit IEP

Close Record

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Copy from Active IEP

The MD Online IEP system allows a user to quickly copy all current IEP data from the Active IEP when working on a new IEP (Next) or an IEP Amendment.

1. Choose **Next IEP**. Then select **Copy From Active IEP** from the Utilities section on Table of Contents or from the navigation drop-down list in the section title located on each of the IEP page.



2. Select **Start Copy** to copy all information data fields from the Active IEP, except for LRE Decision Making and Placement Summary and Close information.



3. For an **Amendment IEP**, choose **Amendment**. Then select **Copy From Active IEP** from the Utilities section on Table of Contents or from the navigation drop-down list in the section title located on each of the IEP page.

Copy Data from Current Active IEP

The Amendment IEP Data you are working on will be replaced by Data from the current active IEP. Are you sure you want to proceed?

Start Copy

Cancel

Note: When copying an active IEP for a **Work on Next IEP**, all text fields, check boxes and radio button choices will copy over into the draft of the IEP and all will be editable. The **LRE Decision Making and Placement Summary** screen will be blank to allow the IEP team to document decisions and update critical date fields. On the **Close** screen, the *Case Manager/Service Coordinator* field, the *IEP Annual Review Date* and the *IEP Meeting Date* will be blank when closing the record to assure the accuracy of the new IEP..

When copying an IEP to create an **Amendment** of that IEP, every text field, check box and radio button choice will copy over into the Amendment IEP and will be editable. Many of the date fields on the **Close Record** screen will not be editable as they reflect the dates of the original IEP development.

Tip: When **Copy from Active** or copying to create an **Amendment** IEP, a pop up window will appear warning that the completion of the copy action will replace any data that may have been entered prior to initiating the **Copy** function. It may be helpful to contact others who may have added information to the draft document before completing the **Copy** function.





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Student Compass Wizards

Copy from Active IEP

Assign Team Members

Print IEP

Audit IEP

Close Record

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Assigning Team Members to a Student's IEP Team

Users are able to **Assign Team Members** via the IEP Summary page or when scheduling a meeting. On the IEP Summary page, there is a tab for the **IEP Team**. Team members can be added/edited or removed. When scheduling a meeting, the Attendees section has an **Add Team member** button. Click this to add team members to the meeting and the case.

Name	Title
aaaaa aaaaa *	Caregiver
bbbb bbbb *	Home-Based Teacher
dont care *	Caregiver
dafdaf dafhaadfn *	Home-Based Teacher
rylory etyetyl *	Caregiver
Annabelle Grazer	Agency Representative
dhsfd hgsgj *	Adapted P.E. Teacher
Doctore MFR MD	Advocate
Sally Sample *	Mental Hygiene Administration
Bob Shimmerincontainer	Assistive Technology Specialist
test test *	DORS Counselor
eight trainer	Division of Rehabilitation Services
John Wellman *	Caregiver

After selecting the **Assign Team Members** from the Utilities section on the Table of Contents in the student's IEP record, there is a place to check the box of the appropriate person(s) or to uncheck those no longer on the IEP team.

Team Members

Names can be added to Assign Team Members in two ways:

1. **Table of Contents**

Editing Demographic Information

Technical Support & Troubleshooting

Name	Title
aaaaa aaaaa *	Caregiver
bbbb bbbb *	Home-Based Teacher
	Caregiver
dafdaf dafhaadfn *	Home-Based Teacher
nylory etyetyl *	Caregiver
	Agency Representative
dhsfd hgsgjl *	Adapted P.E. Teacher
	Advocate
Sally Sample *	Mental Hygiene Administration
	Assistive Technology Specialist
test test *	DORS Counselor
eight trainer	Division of Rehabilitation Services
	Caregiver

2. Profile section (IEP Team tab at bottom of screen):

Name	Type	Title
A Apple	Public Agency Team Member	Principal
admin admin	Public Agency Team Member	Psychologist
Billy Bob	Public Agency Team Member	Principal
Billy Bob	Public Agency Team Member	Special Education Supervisor
Bob Brown	Public Agency Team Member	Counselor
	Additional Member	Parent
	Public Agency Team Member	Special Education Teacher
	Public Agency Team Member	Guidance Counselor
county aaa	Public Agency Team Member	
	Caregiver	Caregiver

There are four types of members to choose from:

- Public Agency Team Members**- these are team members available on the drop-down list who have a login to the MD Online IEP system and match the student by Resident School or Service School.
- Public Agency Team Additional Members**- These team members are available in the drop-down list if they have been previously added through *ADMIN, Add/Edit Addition Member*. These are typically school personnel who are often included on a student's IEP team but would not need access or edit permissions to the child's IEP. For example: school nurse, school counselor.
- Care Givers**- Family members or other care givers can be included here to be accessible to assignment to a student's IEP team.
- Additional Members**- These members represent any other member who needs to be added to be accessible for assignment to a student's IEP team.

IEP Team Member ✖

Public Agency Team Member
 Public Agency Additional Team Member
 Caregiver
 Additional Member

IEP System User

Billy Bob ▼

Title

Special Education Supervisor ▼





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Student Compass Wizards

Copy from Active IEP

Assign Team Members

Print IEP

Amendment Comparison Document

Audit IEP

Close Record

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Print IEP

Printing an IEP is not only useful for creating a paper record of your digital IEP, but also is a quick way to self-audit for errors or areas where more information is needed. Print the entire IEP, select sections or individual pages at any time in the IEP development process.

Particular sections of the IEP can be selected to print only those sections of the IEP. Also, sections that are not needed for an individual student can be suppressed.

1. Select **Print IEP** from the **Utilities section** on the IEP Table of Contents page or from the navigation drop-down list in the section title located on each of the IEP page.
2. Complete the **Draft Date fields** before printing if the IEP is in draft form. Draft Date will only be available for IEPs that have not been closed.
3. If only some sections of the IEP need to be printed, **uncheck items not needed** or select **Clear All** and check the items that are to be printed.
4. Click the **Print button** and a separate browser window will open with a print preview of the IEP in PDF format. This may take a few seconds as the IEP prints to Adobe PDF format. The IEP can be printed or saved from there.

Printing options may need to be adjusted to have the print out correctly sized to the page. Print options to control margins, size of the print, removal of the web page header information etc., can typically be found in the browser's print option or in the print preview browser window at the top.

Note: If Eligibility 2 is indicated as the Child Count Code on the LRE screen, all data entered will print as a Service Plan. If Eligibility 3 or 4 is indicated as the Child Count Code, all data entered will print as an Eligibility 3 or 4 Status Report. If Eligibility 6 is indicated as the Child Count Code, all data entered will print as an Extended Individualized Family Services Plan (IFSP) Option.


Tip: Only required elements of a Service Plan, Eligibility 3 or 4 Status Report or an Extended Individualized Family Services Plan (IFSP) Option will be listed on the Print screen.

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Print IEP

Draft Date
04/21/2015 

Print options

Print Page Numbers
 Print Date on Pages

I. Meeting and Identifying Information

Student Information
 Eligibility
 Student Participation on District/Statewide Assessments and Graduation Information



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Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Student Compass Wizards

Copy from Active IEP

Assign Team Members

Print IEP

- Amendment Comparison Document

Audit IEP

Close Record

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Amendment Comparison Document

Once an Amendment has been created, an **Amendment Comparison** document can be printed from the **Print** page. The **Amendment Comparison** document shows the element of the IEP as it was initially and how it has been changed in the Amendment.

IEP Amendment Changes			
Child Name: CTE.Demo	DOB: 03/13/2000	SASID:	IEP Meeting Date: 10/10/2012
PARTICIPATION DATA			
Field	Before	After	
MSA Assessments - Reading - Is Mod:	Yes		
LEAST RESTRICTIVE ENVIRONMENT (LRE)			
Field	Before	After	
SSIS Service School:	Carol Anne Middle	Carol Anne Private Middle	

In the example above, the Mod MSA Assessment was removed from the IEP and the SSIS Service School was changed from Carol Anne Middle to Carol Anne Private Middle.

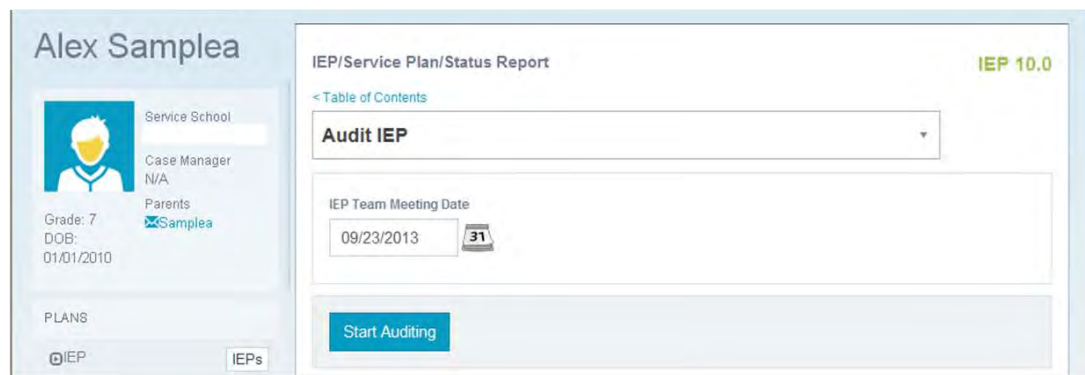


- MD Online IEP User's Guide
- Orientation
- Getting Started
- Locating a Student's Case
- Student Compass: Caseload Level
- Student Compass: Student Level
- Meetings
- IEP Development
- Identifying Information
- Eligibility
- Participation
- Present Levels
- Special Considerations
- Goals
- Services
- LRE and Placement Summary
- Additional IEP Functions
 - Student Compass Wizards
 - Copy from Active IEP
 - Assign Team Members
 - Print IEP
 - Audit IEP**
 - Close Record
- Transferring and Exiting Students
- Forms and Logs
- Reports
- Additional Case Level Functions
- County Level/Data Manager Functions
- Managing User Accounts

Audit IEP

An IEP may be audited at any time during the development of the IEP to search for errors or to identify areas that need more information. This is also useful when working on an IEP over several sessions and identifies areas that remain incomplete need to be completed in order to close the IEP.

To begin the audit process, select **Audit IEP** on the IEP Table of Contents page or from the navigation drop-down list in the section title located on each of the IEP page. The page will refresh with an IEP Meeting Date field and you will see a **Start Auditing** button. Enter the date of the upcoming IEP team meeting and choose **Start Auditing**. The IEP Team Meeting Date can be changed at any time.



When the audit is complete your screen will refresh to indicate areas of the IEP that need attention. Correct or add information to any of the areas indicated by editing selected portions of the case.

When the edit process is complete, **audit the IEP again** to be sure the IEP is now correct and ready to be closed.



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Student Compass Wizards

Copy from Active IEP

Assign Team Members

Print IEP

Audit IEP

Close Record

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Close Record

To close a record, select the **Close Record** link on the IEP Table of Contents page or from the navigation drop-down list in the section title located on each of the IEP page.


1. Enter the **Case Manager/Service Coordinator** name.
2. Check the meeting dates that contributed to the development of the IEP.
3. Enter the **IEP Annual Review Date**. This is not the projected date but rather the date of the current annual review. The **Projected Annual Review** is auto-populated to reflect one year minus a day in the future of the **IEP Annual Review Date**.
4. The **Most Recent Evaluation Date** is populated from the **Date of Initial Evaluation** on the **Initial Eligibility** page of the IEP or the **Evaluation Date** on the **Continued Eligibility** page. The **Projected Evaluation Date** is auto-populated to reflect three years minus a day in the future of the **Most Recent Evaluation Date**.
5. The **IEP Team Meeting Date** is the actual date of the IEP team meeting. If the document is an **Amendment**, an **Amendment Date** field will be present. Enter the date of the IEP team meeting when the amendment was created or the date an amendment occurred without an IEP team meeting.


Note: A form is available to document changes made to the IEP without an IEP team meeting. See Amendment/Modification to Current IEP without an IEP Team Meeting in the **FORMS** section of **Student Compass**.


Editing Demographic Information


Technical Support & Troubleshooting


07/09/2014
 07/11/2014

IEP Annual Review Date
04/05/2007 

Projected Annual Review Date
04/04/2008 

Most Recent Evaluation Date


Projected Evaluation Date


IEP Team Meeting Date
04/05/2007 

Parent was provided a copy of the Procedural Safeguards and Parental Rights document
 Yes No

The parents were provided a verbal and written explanation of the parents' rights and responsibilities in the IEP team process.
 Yes No

Parents were provided verbal and written information about access to habilitative services, including a copy of the Maryland Insurance Administration's Parents' Guide to Habilitative Services.
 Yes No

[Close IEP](#) [Clear Form](#)

Note: When completing "Close Meeting", a list of all meetings associated with this student's case will be displayed. When closing the IEP, select any or all of the meetings date(s) to be included in this closed IEP. Selecting these meeting dates will also pull those meeting attendees into **Assign Team Members** for inclusion on the "IEP Participants" list of the printed IEP.

Once the IEP is finalized and approved by the IEP Team, select the **Close** link at the bottom of the screen. Closing an IEP automatically begins an additional audit of the IEP. The **Close Record** compliance audit may find additional errors not found during the Audit IEP function. Make all necessary corrections to successfully close the IEP for data reporting to the **Special Services Information System (SSIS)** at MSDE.





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Transferring between Schools

Transferring between Local School Systems

Exiting a Student from Special Education

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support &

Transferring and Exiting Students

Transfer of a student's IEP record should occur when a student leaves the resident county school system or transfers to another school within the school system. For transfers between school systems, the school system receiving the student should request the record transfer from the sending school system. The request should be completed by the receiving school system communicating with the contact for the sending school system. A **Contact List** is provided to each director of special education, data manager and contact on the list regularly as changes occur. The request should include the **student's name, date of birth and State Assigned Student Identification (SASID) number** as well as the Resident County and School and, if appropriate, the Service County and School of the receiving school system.

An **exit record** would need to be created for students no longer receiving special education services due to:

- withdrawing from the resident county school system,
- returning to general education,
- graduating from the school system or
- dropping out of school.

Note: Before transferring a student's IEP record to a different school system, be sure to **complete the exit information** on the **Student and School Information** screen and in the **IEP Amendment** and close the IEP. Once the new Resident County and School are recorded on the Edit Demographics screen and saved, the record is no longer available. Data Managers will have the ability to view an IEP of a transferred student.



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Transferring between Schools

Transferring between Local School Systems

Exiting a Student from Special Education

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

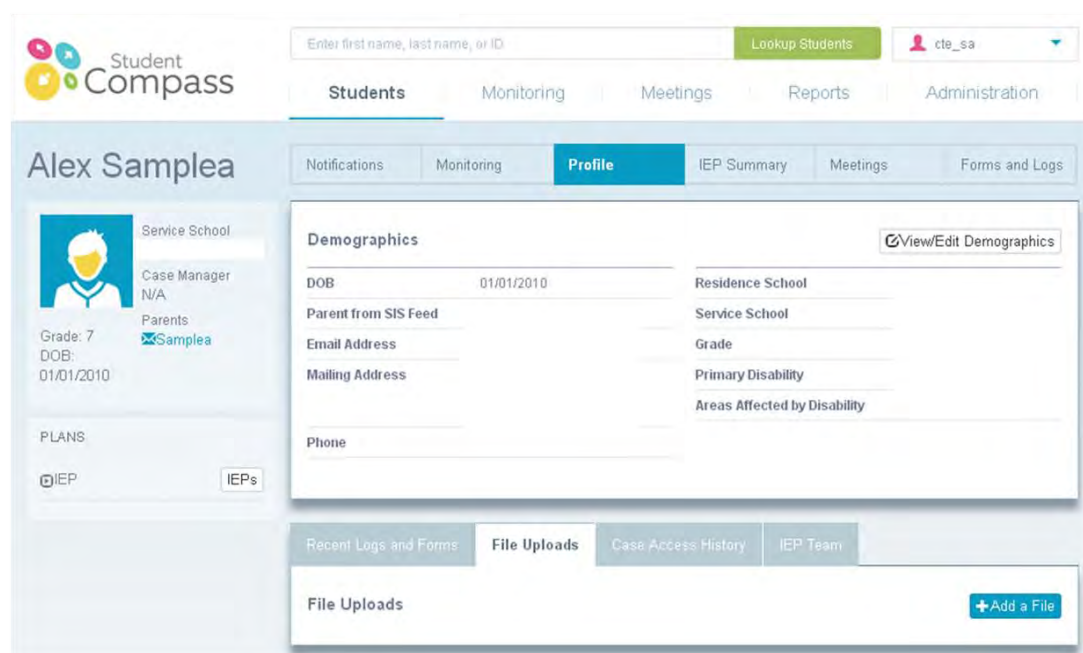
Editing Demographic Information

Technical Support &

Transferring between Schools

To transfer a student from one school to another (within a local school system) or from one nonpublic to another:

1. Select **Edit Demographics** from the **Demographics** part of the **Profiles** page in the **Student Compass Module**.



2. When the student will remain in the *Resident County* and only be transferring to a new school within the system, change the *Resident School and/or Service School* to reflect the student's new school placement. Click the **SAVE** button.

Note: There is no need to create an **Exit Record** for a student remaining in the same Resident County but is moving from one school to another in the school system or from one nonpublic school to another.

Troubleshooting

Residence County
Carol Anne

Residence School
 Public Private

Public Schools
Carol Anne Middle

Service County
Carol Anne

Service School
 Public Private

Public Schools
Carol Anne Elementary

(The Residence County is the LSS claiming the student for child count)
Please make sure that you properly exit the student before transferring to another LSS. Once transferred, IEP is no longer available to the transferring LSS.
1. Open an amendment.
2. Specify the exit date and exit reason.
3. Close the amendment.
4. Transfer the student.

Nonpublic School Transfer when Student will Remain in the Same Resident County

Nonpublic transfers are completed by changing the **Service County and/or School**.

Residence County
Carol Anne

Residence School
 Public Private

Public Schools
Carol Anne Middle

Service County
Carol Anne

Service School
 Public Private

Private Schools

(The Residence County is the LSS claiming the student for child count)
Please make sure that you properly exit the student before transferring to another LSS. Once transferred, IEP is no longer available to the transferring LSS.
1. Open an amendment.
2. Specify the exit date and exit reason.
3. Close the amendment.
4. Transfer the student.

Save Cancel

Note: Nonpublic transfers for a student remaining in the same Resident County but is moving to a new nonpublic school may need to have the student's **Service County** changed as nonpublic schools are located in the **Private School** menu of the county within which they are geographically located.



Maryland State Department of Education
Maryland Online IEP
 MSDE Division of Special Education and Early Intervention Services

MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Transferring between Schools

Transferring between Local School Systems

Exiting a Student from Special Education

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

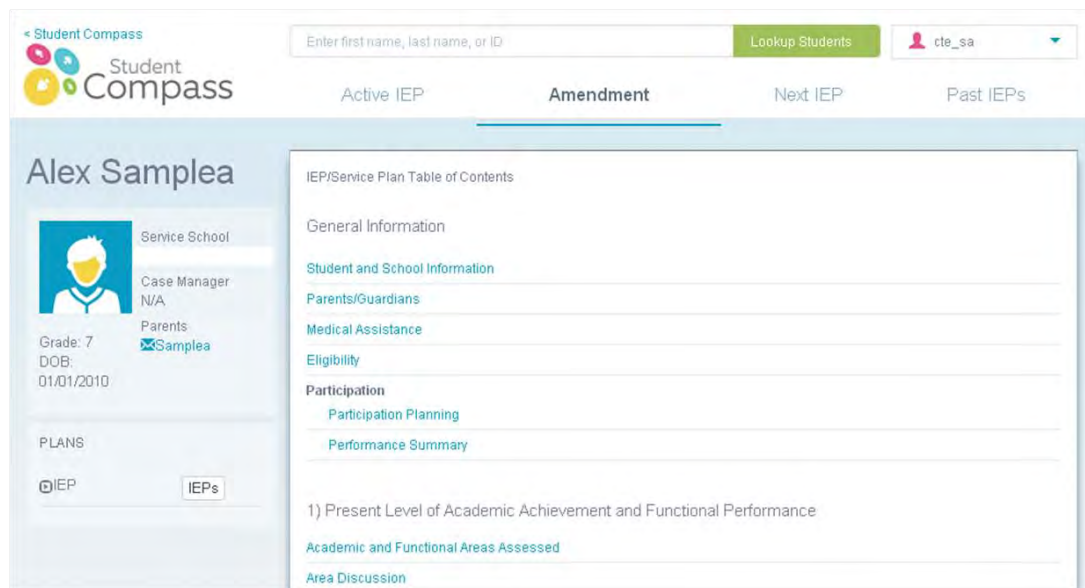
Technical Support &

Transferring between Local School Systems

Transferring a student between two school systems is a two-step process:

1. An Exit Record must be created.

To create an **Exit Record**, select **Amendment** from the **IEP Module**.



Complete the appropriate **Exit Date** and **Exit Category** at the bottom of the *Student and School Information* page of the IEP and click the **SAVE** button. The end date for each service in the IEP will be automatically updated to match the **Exit Date**.

Jurisdiction and Care

Which jurisdiction is financially responsible?

Carol Anne

Is the student currently under the care and custody of a state agency?

Yes No

Does the student require a parent surrogate?

Yes No

Exit Information

Exit Date

31

Exit Category

Save Clear Form

Close the Amendment.

2. Transfer the record.

From the **Profile page**, choose **View/Edit Demographics** and change the **Resident County and Resident School** to reflect the student's new school system and school and click the **SAVE** button. The student's record will immediately be exited from special education in your local school system and his/her IEP will be transferred to the new school system.

Note: Resident County includes all local school systems as well as the following:

- Adult Correctional Facilities
- Department of Health and Mental Hygiene
- Maryland School for the Deaf
- Maryland School for the Blind
- Maryland State Department of Education/Juvenile Services Education
- SEED School of Maryland

If a student is attending school in one of the facilities listed above, the Resident County and School cannot be a local school system but should reflect the facility in which the student attends school.

Note: Once the transfer is complete, the record will no longer be available to the sending school system. It is important to note the warning that appears in **red** on the screen as well as the pop up reminder that appears when clicking the **SAVE** button. The **Exit Record** needs to be submitted by the school system the student is leaving prior to the transfer of the student's record.





MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Transferring between Schools

Transferring between Local School Systems

Exiting a Student from Special Education

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support &

Exiting a Student from Special Education

When exiting a student from Special Education, select **Amendment** from the **IEP module**.



< Table of Contents

Close Record

The IEP information for this IEP meeting will not be editable once this IEP record is closed.

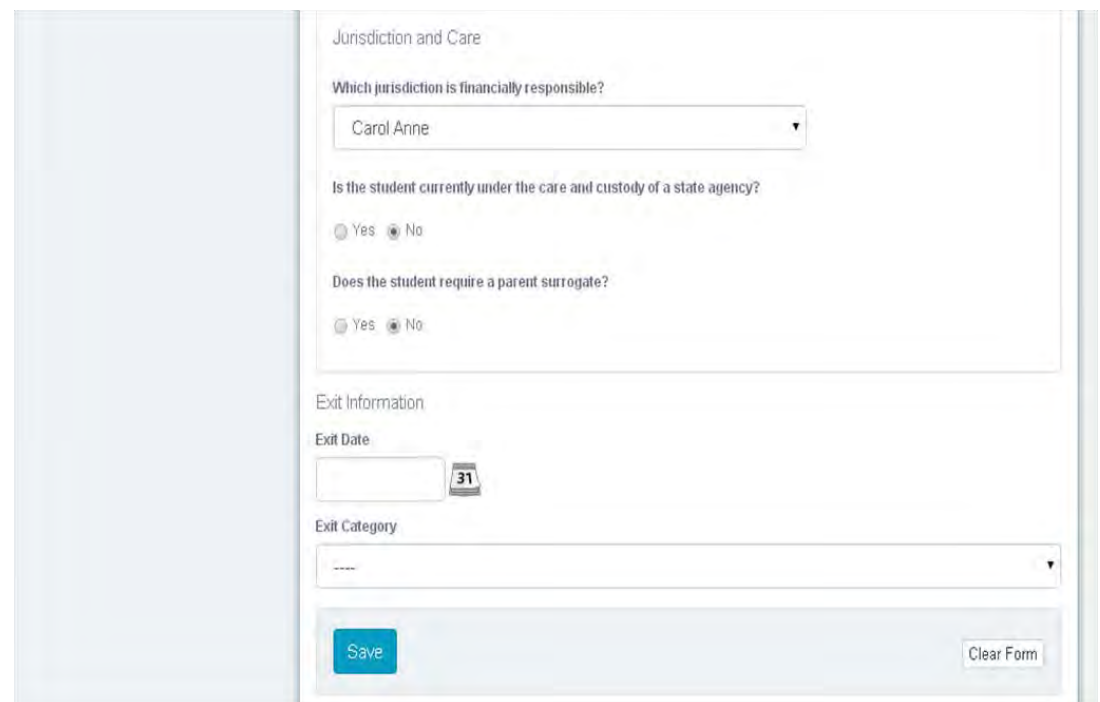
Case Manager/Service Coordinator

Debra Drew

Scheduled Meeting Date(s)

06/26/1914
 05/03/2007
 05/26/2007
 07/10/2007

On the **Student and School Information** page of the student's IEP, select the appropriate **Exit Date** and **Exit Category**. Click the **SAVE** button.



Jurisdiction and Care

Which jurisdiction is financially responsible?

Carol Anne

Is the student currently under the care and custody of a state agency?

Yes No

Does the student require a parent surrogate?

Yes No

Exit Information

Exit Date

31

Exit Category

Save Clear Form

Close the **Amendment**.

If the student is transferring to a new school, proceed to **Edit Demographics** to complete the transfer process.



Maryland State Department of Education
Maryland Online IEP
 MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Completing a Log Note

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Forms

The **Forms and Logs** section in the **Student Compass** module provides access to several special education forms useful for managing a student's case. The forms are listed under the headings of **Process Forms** and **Supplemental Forms**. Forms are an optional feature of the MD Online IEP and use of some or all of the forms is determined individually by each local school system.

Note: County Level/Data Managers with **Forms Administrator** permission are able to determine which forms are available to their users in the local school system.

General information regarding the completion of Forms in the Student Compass section of the Maryland Online IEP system

The following functions apply to all forms available in the **Forms and Logs** section:

- Forms are associated with a student's record, be sure to access a student's record before choosing a form.
- Some forms have multiple sections to be completed. These are to be completed in the order listed. The first one listed must be completed and saved before accessing any additional options.
- The **Form Completed On Date/Date of Notice** located at the bottom of the page or the first page of a series of pages is required and is not editable after the screen is saved.
- All required fields must be completed to successfully save a form.
- Completed forms may populate corresponding fields within the student's IEP; however, be sure to review all screens within the student's IEP for accuracy.

To Complete a Form

1. Select **Complete Form** for the form that is to be filled out.

2. Complete and navigate through each section to complete a form in its entirety. After successfully saving this section of the form, look for "successfully saved" message at the top of the screen in green.
3. While completing each section, be sure to notice the green "INFORMATION SUCCESSFULLY SAVED!" in the header to ensure the page has been saved.

User can print a completed form by clicking the **Print** button next to the date of the form. An option to **Print a Blank Form** is also available.

Open a completed form to review or edit by clicking the **date of the form** in the list underneath the title of the form.

The screenshot shows the Student Compass interface for a student named Samantha Sample. The left sidebar contains her profile information, including her role as Case Manager and her grade (10). The main content area is titled 'Process Forms' and displays a list of forms. The first form is '(1) Child Find Referral' with a completion date of 06/27/2014. The second form is '(6) Notice of Individualized Education Program (IEP) Team Meeting', which has a table of completion dates and options to view member titles only or with names.

Meeting Date	Form Completed On	Member Titles Only	Member Titles and Names
07/09/2014	06/03/2014	Member Titles Only	Member Titles and Names
06/23/2014	06/06/2014	Member Titles Only	Member Titles and Names
06/05/2014	06/25/2014	Member Titles Only	Member Titles and Names

Note #1: County Level/Data Managers with Forms Administrator permission are able to delete individual student forms.

Note #2: All forms can be reviewed at: www.cte.jhu.edu/MDIEPDemo. After accessing a student from the Case Matrix: Cases tab, click the **Forms and Logs** button.





search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Completing a Log Note

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

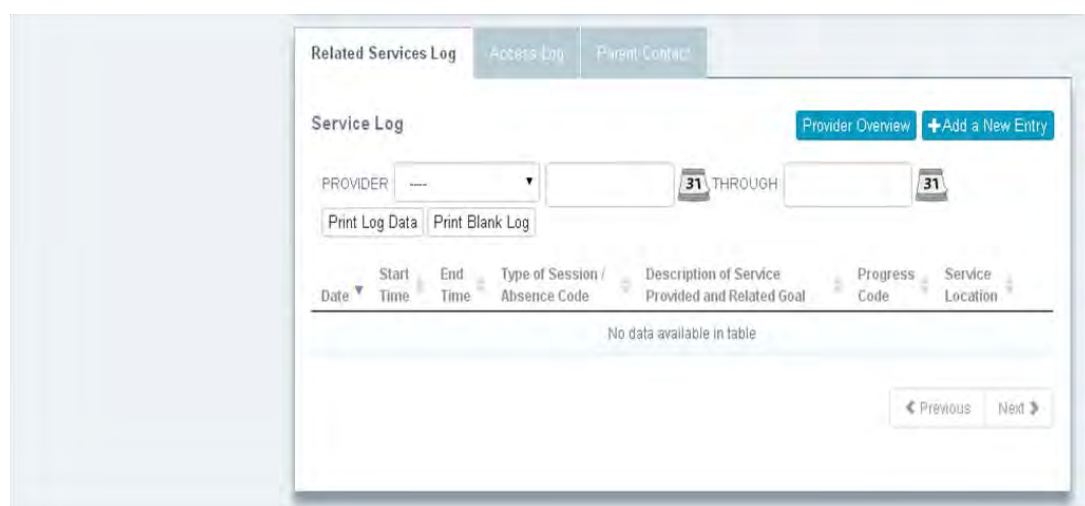
Technical Support & Troubleshooting

Completing a Log

Three types of Logs are available in the MD Online IEP system are as follows:

1. Related Services Log Notes
2. Access Log
3. Parent Contact Log

These logs can be accessed from the **Profile page** or from the **Forms and Logs page**.




Completing a Related Services Log Note

The purpose of the **Related Services Log Note** is to allow related service providers the opportunity to document the date, start time, end time, type of session/absence code, description of service provided, related goal, progress code, and service location of their service sessions.

To add a **Related Service Log note**, click the **Add New Entry** button to display the **Add Related Service Log Entry page**. To edit an existing **Related Service Log note**, click the **Edit** button on the line of the note that is to be edited. To delete a **Related Service Log note**, click the **Delete** button on the line of the note that is to be deleted.

Service Log Entry

Date: 07/06/2014 

Start Time: 10:15 p.m.

End Time: 10:15 p.m.

Type of Session/Absense Code: ----

Services

Service Nature	Location	# of Sessions	Length of Time	Frequency	Begin Date	End Date
Transportation					06/23/2014	06/22/2015
Classroom Instruction	Outside General Education	-1	2 Hr	Weekly	06/23/2014	06/22/2015
Classroom Instruction	In General Education	-1	3 Hr 50 Min	Weekly	06/23/2014	06/22/2015

Goals

Given an instructional level text, multisensory direct instruction, and access to reading strategy cues, Sam will apply phonics and word analysis skills in decoding one- to two-syllable words with vowel digraphs, CVC patterns, and long vowels with 85% accuracy on 5 consecutive trials as measured by classroom-based assessments.



Completing Access Log and Parent Contact Log











The purpose of the **Access Log** is to allow users the opportunity to document the date, time, name, title, agency and purpose of access to a student's record.

To add an **Access Log** note, click the **Add New Entry** button to display the **Add Access Log Entry** page. To edit an existing **Access Log** note, click the **Edit** button on the line of the note that is to be edited. To delete an **Access Log** note, click the **Delete** button on the line of the note that is to be deleted.

Related Services Log | **Access Log** | Parent Contact

Access Log [+ Add a New Entry](#)

 THROUGH  [Print Log Data](#) [Print Blank Log](#)

Date/Time	Name	Title	Agency	Purpose	
06/27/2014 11:30 am	msde staff	msde	msde	Compliance monitor	 
06/27/2014 11:30 am	lynn	msde	msde	Review documents, Enter new information	 
06/27/2014 11:30 am	chief	msde	msde	Review documents	 
06/27/2014 11:30 am	Ed Specialist	MSDE	MSDE	Compliance monitor	 
06/27/2014 11:30 am	QA Specialist	MSDE	MSDE	Compliance monitor	 

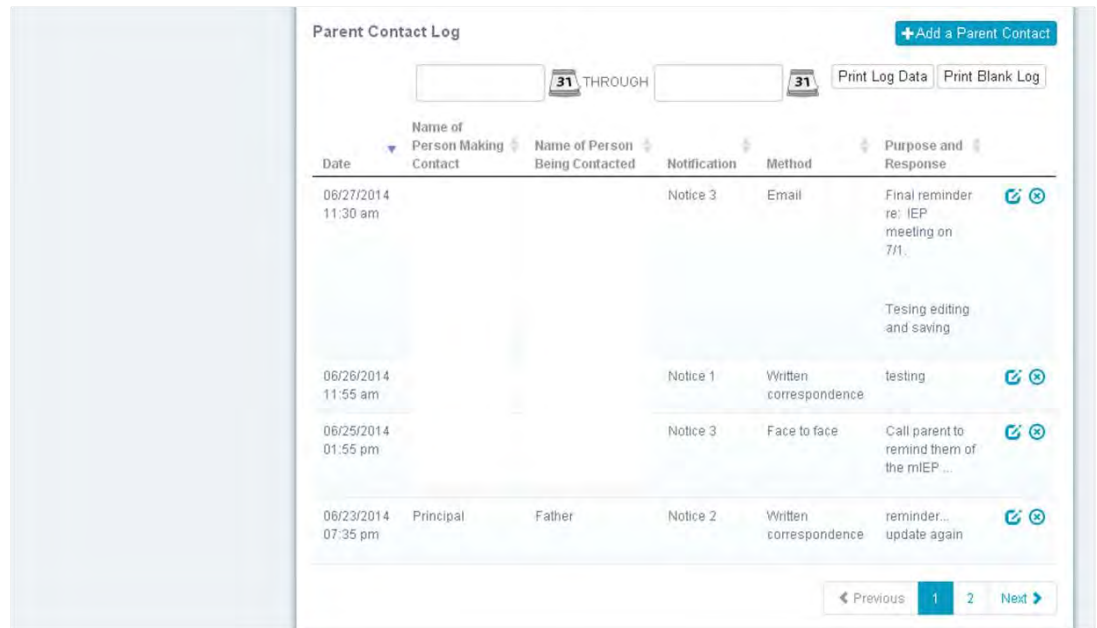
[← Previous](#) 1 [Next →](#)

The **Access Log** also displays a record of previous log entries.

Parent Contact Log

The purpose of the **Parent Contact Log** is to allow users the opportunity to document the date, time, name of person making contact, name of person being contacted, notification, method, and purpose/response of the parental contact. The **Parent Contact Log** enables users to create a log that tracks the communication between parents and school personnel.

To **add a Parent Contact Log note**, click the **Add a Parent Contact** button to display the Add Parent Contact Log Entry page. To **edit an existing add a Parent Contact Log note**, click the **Edit** button on the line of the note that is to be edited. To **delete add a Parent Contact Log note**, click the **Delete** button on the line of the note that is to be deleted.



Date	Name of Person Making Contact	Name of Person Being Contacted	Notification	Method	Purpose and Response
06/27/2014 11:30 am			Notice 3	Email	Final reminder re: IEP meeting on 7/1. Testing editing and saving
06/26/2014 11:55 am			Notice 1	Written correspondence	testing
06/25/2014 01:55 pm			Notice 3	Face to face	Call parent to remind them of the mIEP ...
06/23/2014 07:35 pm	Principal	Father	Notice 2	Written correspondence	reminder... update again

The **Parent Contact Log** also displays a record of previous log entries.

Note #1: The **Parent Contact Log** can be used to document attempts to notify parent of IEP Team Meetings.

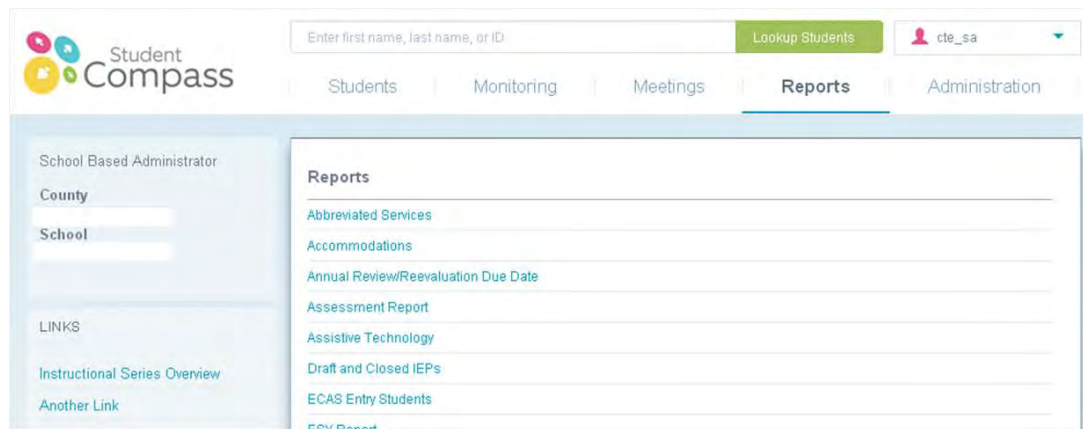
Note #2: Logs are located at the bottom of the **Forms** page or the **Profile** page.




[MD Online IEP User's Guide](#)
[Orientation](#)
[Getting Started](#)
[Locating a Student's Case](#)
[Student Compass: Caseload Level](#)
[Student Compass: Student Level](#)
[Meetings](#)
[IEP Development](#)
[Identifying Information](#)
[Eligibility](#)
[Participation](#)
[Present Levels](#)
[Special Considerations](#)
[Goals](#)
[Services](#)
[LRE and Placement Summary](#)
[Additional IEP Functions](#)
[Transferring and Exiting Students](#)
[Forms and Logs](#)
[Reports](#)
[Printing Reports](#)
[Export to CSV](#)
[Additional Case Level Functions](#)
[County Level/Data Manager Functions](#)
[Managing User Accounts](#)
[Editing Demographic Information](#)
[Technical Support & Troubleshooting](#)

Reports

From **Student Compass: Caseload level**, choose the **Reports** section to navigate to the available reports in the MD Online IEP.


 The screenshot shows the 'Student Compass' interface. At the top, there is a search bar with the text 'Enter first name, last name, or ID' and a 'Lookup Students' button. To the right, there is a user profile icon labeled 'cte_sa'. Below the search bar, there are navigation tabs: 'Students', 'Monitoring', 'Meetings', 'Reports' (which is highlighted), and 'Administration'. On the left side, there is a 'School Based Administrator' section with fields for 'County' and 'School'. Below that, there is a 'LINKS' section with links for 'Instructional Series Overview' and 'Another Link'. The main content area is titled 'Reports' and lists several report categories: 'Abbreviated Services', 'Accommodations', 'Annual Review/Reevaluation Due Date', 'Assessment Report', 'Assistive Technology', 'Draft and Closed IEPs', 'ECAS Entry Students', and 'FSY Report'.

The following functions apply to all **Reports** available in the **Student Compass** module:

- User permissions determine ability to select criteria and view results.
- Unless noted in the report description, reports can only be generated on closed IEPs.
- When selecting criteria, a resident county must be chosen to select a resident school (along with a designation of private or public), the same applies when choosing a service county and school. A grade can be chosen independent of resident county/school or service county/school.
- If both the service county and school, as well as, the resident county and school criteria are selected, the reporting tool will yield a smaller, more specific set of results. Selecting the resident county will produce a report of students within the selected county regardless of service county. Selecting the service county will produce a report limited to students within the selected county regardless of resident county.
- Each report can be viewed on screen or printed in summary or, where applicable, detail format by student.
- The reporting tool also allows the download of the information to a CSV file.

Use the links below to review the descriptions and functionalities of all available reports.

Reports Available in MD Online IEP



[Abbreviated Services](#) (225 KB)

To review Services data for individual students or a group of students with closed IEPs.



[Accommodations Report](#) (168 KB)

The purpose of this report is to review accommodation's data for individual students or a group of students with closed IEP's.



[Annual Review-Reevaluation Due Date Report \(194.5 KB\)](#)

The purpose of this report is to review Annual Review/Reevaluation Due Dates for students with closed IEP's.



[Assistive Technology Report \(258 KB\)](#)

To review Assistive Technology data for individual students or a group of students with closed IEP's.



[Draft and Closed IEP Report \(110 KB\)](#)

The purpose of this report is to review IEP status, either Draft or Closed.



[ECAS Entry Students \(221.5 KB\)](#)

To review assessment data for individual students or a group of students with closed IEPs. The students in this report may need to have an Entry Checklist created in the Early Childhood Accountability System within 6-8 weeks of the Implementation of Initial IEP date.



[ESY Report \(835.5 KB\)](#)

To review the ESY decision for individual students or a group of students with closed IEP's with goals.



[Exited Report \(217.5 KB\)](#)

To review exit data for individual students or a group of students with closed IEP's.



[IEP Snapshot \(1 MB\)](#)

To review a summary of the IEP for individual students or a group of students with closed IEP's.



[Initial Eligibility Timeline \(812 KB\)](#)

To review the Initial Eligibility Timeline for individuals or a group of students with a completed Notice and Consent for Assessment Form.



[LRE Report \(1.1 MB\)](#)

To review LRE placement data in Detail form for an individual or group of students or in Summary form from a school or district perspective.



[Manifestation/BIP/FBA \(227 KB\)](#)

To review manifestation, BIP and FBA data for individual students or a group of students with closed IEP's.



[Medical Assistance Report \(213 KB\)](#)

To review medical assistance data for individual students or a group of students receiving medical assistance.



[Present Levels Report \(251 KB\)](#)

To review area discussion information for individual students or a group of students with closed IEP's.



[Progress Report \(76 KB\)](#)

The purpose of this report is to review progress toward IEP goals for individual students or a group of students with closed or draft IEP's with goals.



[indicator-11 report \(822 KB\)](#)

To review referral and initial eligibility data for individual students or a group of students.



[indicator-12 report \(786.5 KB\)](#)

To review referral and eligibility data for individual students or a group of students transitioning from Part C, Infants and Toddlers program, to Part B, preschool special education.



[Services Report \(139.5 KB\)](#)

The purpose of this report is to review Services data for individual students or a group of students with closed IEP's.



[Student Goal Matrix \(67.5 KB\)](#)

To provide a matrix of student's goals and objectives to document progress as instruction is provided (data collection).



[Special Considerations \(350 KB\)](#)

To review special considerations data for individual students or a group of students with closed IEP's.



[Supplementary Aids, Services, Supports and Program Modifications \(167.5 KB\)](#)

The purpose of this report is to review Supplementary Aids, Services, Supports and Program Modifications data for individual students or a group of students with closed IEP's.



[Transition Report \(786 KB\)](#)

The purpose of this report is to review postsecondary transition data for individual students or a group of students with closed IEP's.



[Assessment Report \(223 KB\)](#)

To review assessment data for individual students or a group of students with closed IEP's.



[User Report \(66 KB\)](#)

The purpose of this report is to review user levels and privileges. This report is only available to County Level Data Managers.

[Batch Download](#)





Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Printing Reports

Export to CSV

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Printing Reports

After running a report the results are displayed. To print the report, click the **Print Report** button.

The screenshot shows the 'Maryland IEP' interface. At the top right, there is a 'Reports' button. Below it, a navigation breadcrumb reads 'REPORTS > ABBREVIATED SERVICES > RESULTS'. Two buttons, 'Print' and 'Export to CSV', are circled in blue. The main content area is titled 'Abbreviated Services' and lists the following information:

- Resident County:** Carol Anne
- Resident School:** Carol Anne Elementary
- Service County:** Any
- Service School:** Any
- Grade:** Any

Below this information, a student record for 'Polly Anna' is shown with the following details:

SASID	1234567890	Old Race	American Indian or Alaskan Native
-------	------------	----------	-----------------------------------

Some adjustments may be needed in the user's browser to enable correct printing. See local school system technology administrator if further assistance is needed.

Tip: If users experience issues with printing, changes can be made to the actual browser print settings. Users can change the print settings in the browser once you have selected to print and IEP form (not the IEP itself which is a pdf). Users can play with the Print Preview settings to make the forms scale to 100% or landscape view.

You can even remove the Header title and URL if they like too.

Here is a video link that shows how to adjust these settings in Firefox: <http://youtu.be/a5yci0vXzxE>



Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Printing Reports

Export to CSV

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Export to CSV

Once report criteria have been selected and the user chooses to view results in either detail or summary format, the CSV file can be downloaded by clicking on the **Export to CSV** button.

The screenshot shows the 'Maryland IEP' interface. At the top right, there is a 'Reports' button. Below it, a breadcrumb trail reads 'REPORTS > ABBREVIATED SERVICES > RESULTS'. In the top right corner of the results area, there are two buttons: 'Print' and 'Export to CSV'. The 'Export to CSV' button is circled in blue. Below the buttons, the page title is 'Abbreviated Services'. The data shown includes: Resident County: Carol Anne; Resident School: Carol Anne Elementary; Service County: Any; Service School: Any; Grade: Any. A student record for 'Polly Anna' is highlighted in yellow, with fields for SASID (1234567890) and Old Race (American Indian or Alaskan Native).

Export to CSV will enter the data into a spreadsheet format of the user's choosing. The data can then be sorted, ordered and organized for customizable uses.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

Create Child

Locating Active or Archived IEP

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Additional Case Level Functions

Additional Case-level functions include:

- Create Child
- Locating Active IEP
- Locating Archived or Pending IEP



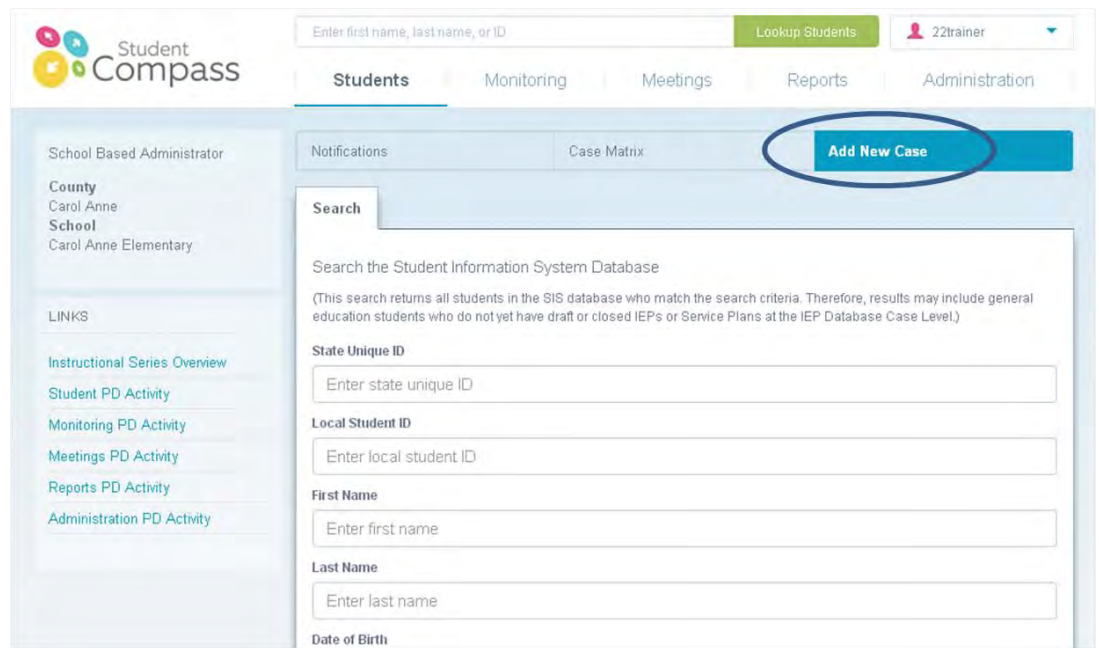
- MD Online IEP User's Guide
- Orientation
- Getting Started
- Locating a Student's Case
- Student Compass: Caseload Level
- Student Compass: Student Level
- Meetings
- IEP Development
- Identifying Information
- Eligibility
- Participation
- Present Levels
- Special Considerations
- Goals
- Services
- LRE and Placement Summary
- Additional IEP Functions
- Transferring and Exiting Students
- Forms and Logs
- Reports
- Additional Case Level Functions
 - Create Child**
 - Locating Active or Archived IEP
- County Level/Data Manager Functions
- Managing User Accounts
- Editing Demographic Information
- Technical Support & Troubleshooting

Create Child

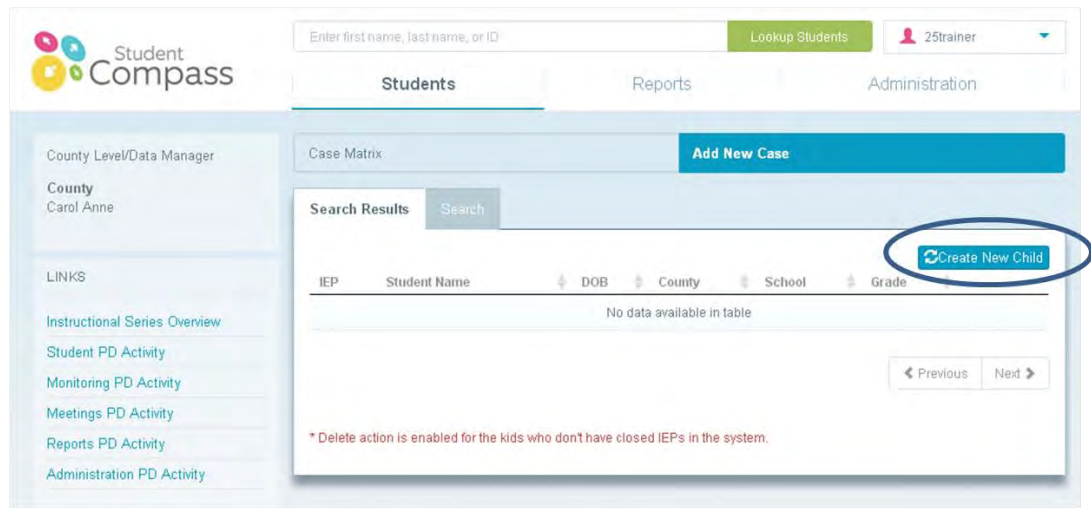
The **Create a Child functionality** to add the student to the MD Online IEP system is located in **Students section of Student Compass**. Click on the **Add a New Case section** on the far right.

Students who are not included in the student demographic file that is **uploaded nightly** by the local school system (LSS) to the MD Online IEP system can be added to the MD Online IEP system. Only a County Level/Data Manager level user and a School Based Administrator with **Can Create Child permission** may add students to the MD Online IEP system. Additionally, nonpublic users may only add students to the IEP system who are from local school systems NOT using the MD Online IEP system. Students from LSS's using the MD Online IEP system must be placed in the nonpublic school by a MD Online IEP user from the LSS.

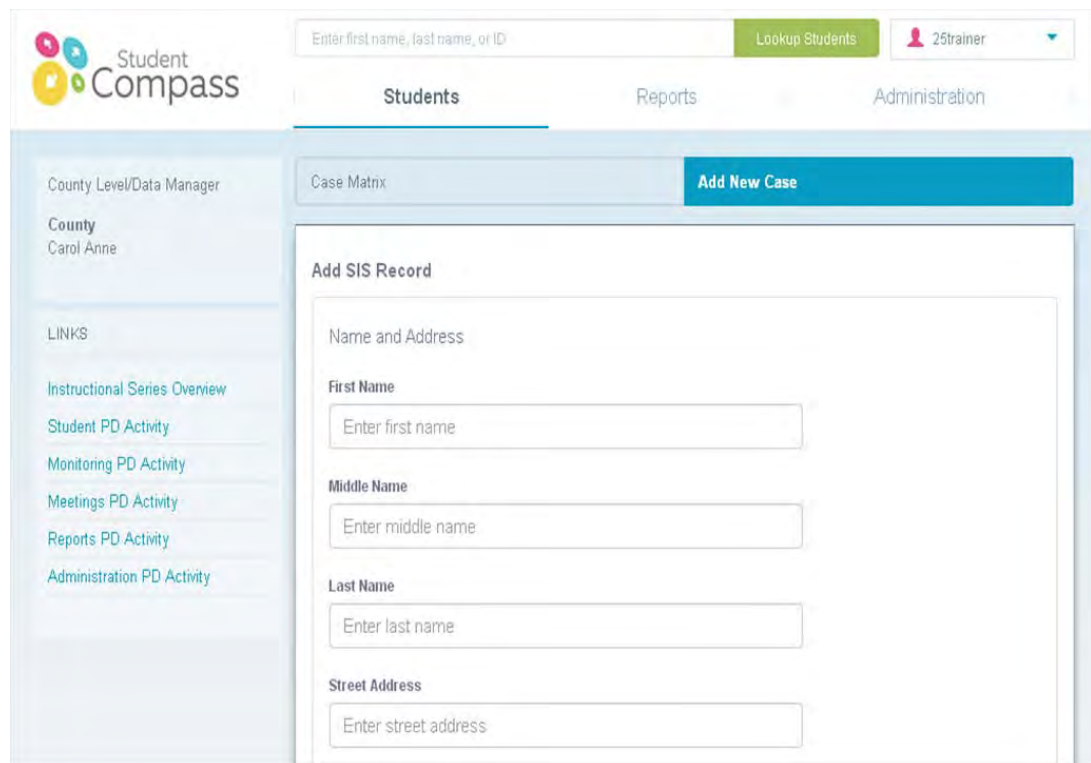
1. Use the **Search page** to search the Student Information System Database for the student.



2. Upon completion of an unsuccessful search for a case through **Add a New Case**, a **Create Child button** will be an option on the page.



3. Enter all information on the **Create a Child** page to add the student to the MD Online IEP system.



4. After a student record is created, the **IEP Summary** page will appear with the students information. The **IEPs** button can be clicked to initiate completing the IEP.

Student Compass

Enter first name, last name, or ID Lookup Students 22trainer

Students | Monitoring | Meetings | Reports | Administration

Alex Samplea

Notifications | Monitoring | Profile | **IEP Summary** | Meetings | Forms and Logs

IEP Summary

IEPs

Service School

Case Manager N/A

Parents Samplea

Grade: 7
DOB: 01/01/2010

PLANS

IEP

IEPs

Note: If the following error message appears "There already exists a different record with the same information." when attempting to **Create a Child**, the message will indicate where the student's record is located. If the record is in a different school in the LSS or if the student's record is in a different LSS, your MD Online IEP administrator can work to have the record transferred to the appropriate school.



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Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

Create Child

Locating Active or Archived IEP

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Locating Active or Archived IEP

IEPs developed and closed in the MD Online IEP system are archived and are readily available for review as a read only document. **Closed IEPs cannot** be edited, only progress on IEP goals can be added. The most recently closed IEP is considered the **Active IEP** and is the default when the IEP module is initially accessed by clicking the Open IEP button. Older IEPs can be located by clicking the Past IEP's section above the IEP table to contents. IEP's developed for students transitioning from Part C, Infants & Toddlers to Part B, Preschool Special Education prior to the third birthday, will be held in Past IEP's section until the child's third birthday.

The screenshot shows the 'Student Compass' interface for Alex Samplea. The 'Active IEP' tab is circled in blue. The student's profile includes a photo, service school (Carol Anne Middle), case manager (SE), and grade (6). Below the profile, there are buttons for 'PLANS' and 'IEPs'. The main content area shows the 'IEP/Service Plan/Status Report' for IEP 10.0, with various sections like 'General Information', 'Student and School Information', and 'Participation'.

The archive screen provides the original IEP date, the date the IEP was closed and information regarding whether the IEP was a **Work on Next** or an **Amendment** IEP. To select an IEP, click on the blue IEP date link (e.g. [10/10/2012](#)).

The screenshot shows the 'Student Compass' interface for Alex Samplea with the 'Past IEPs' tab selected and circled in blue. The student's profile is visible on the left. The main content area shows a list of past IEPs. Two entries are shown, both dated 07/07/2014. The first entry is an 'Amendment' with a meeting date of 07/07/2014 and closed time of 02:29 pm. The second entry is a regular IEP with a meeting date of 07/07/2014 and closed time of 08:52 am.



Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Letter Library

Manage Case Rollover

Sync Email Notification and Audit Log

Forms Management

SQL Snapshot

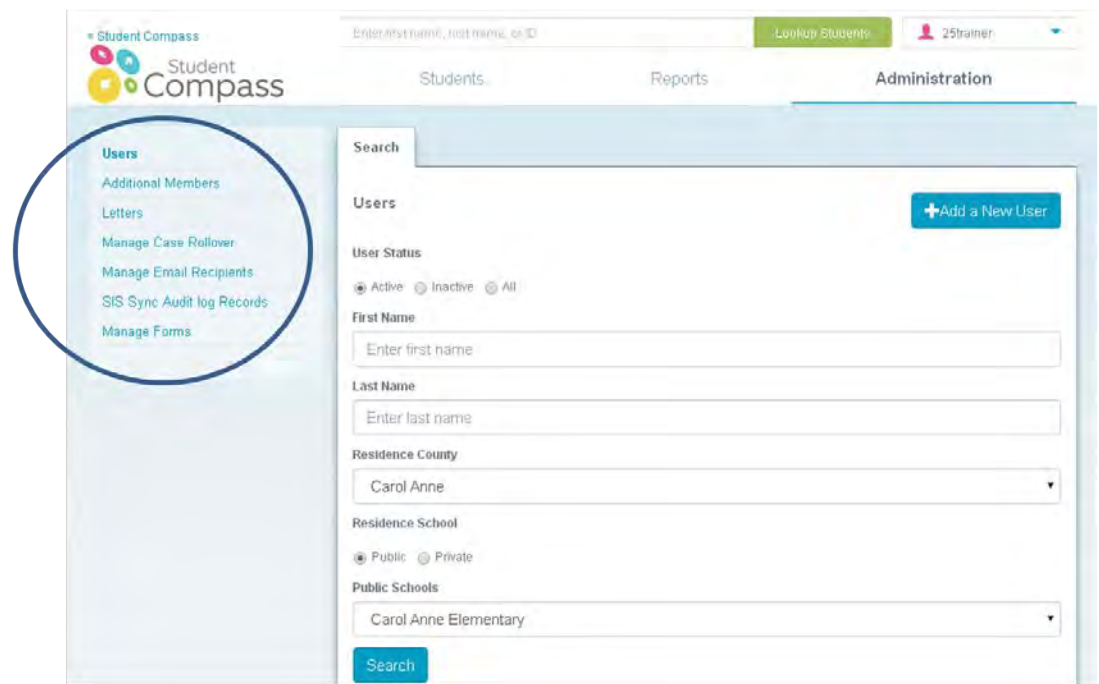
Addressing Duplicate Records

Inactivate Records

County Level/Data Manager Functions

Certain functions are exclusive to the **County Level/Data Manager user with Admin Access**. The County Level/Data manager will see the following on the Admin tab of the IEP module. In addition to the menu items listed on the navigation panel, receiving an SQL file, addressing duplicate records and how to inactive a record will also be described.

Instructions on adding, editing users accounts is covered in the [Managing User Accounts](#) section.





Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Letter Library

Manage Case Rollover

Sync Email Notification and Audit Log

Forms Management

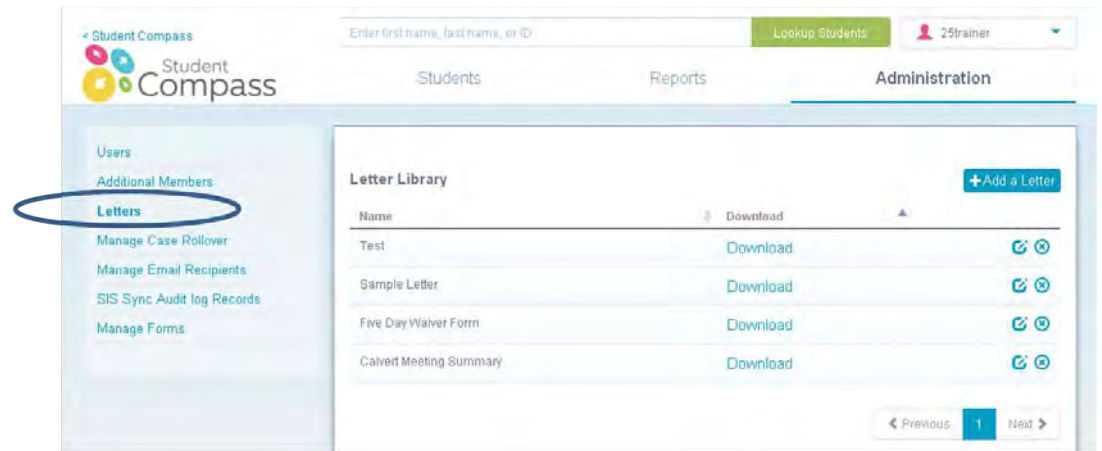
SQL Snapshot

Addressing Duplicate Records

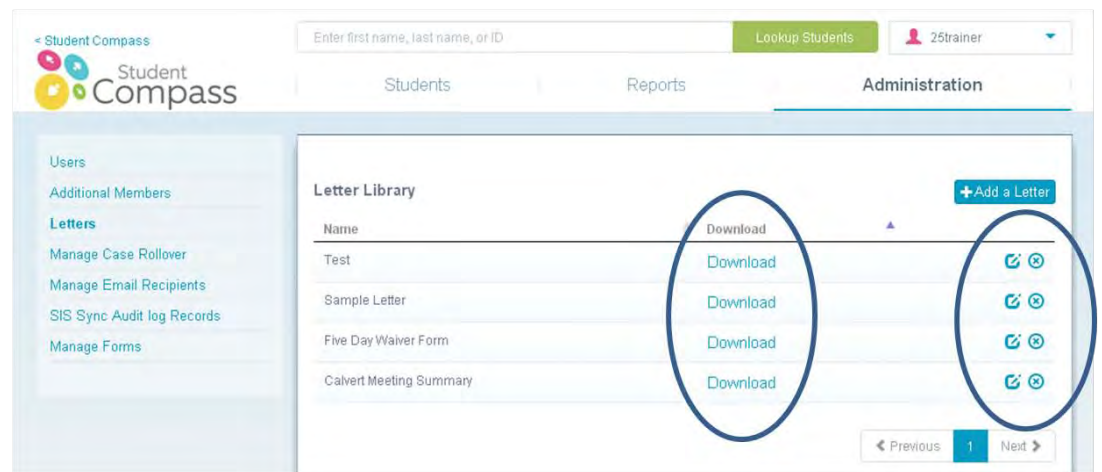
Inactivate Records

Letter Library

County Level/Data Managers with Admin Access can upload letters or documents for users in their school system to access. The **Letter Library** could include form letters or informative documents that users may be directed to use when communicating with parents. Other uses may be to file documents that explain a practice or protocol utilized by the local school system. Although the document would not be interactive or dynamic, once the document is uploaded to the **Letter Library**, it can be accessed and printed for use.



Letters or documents uploaded to the system will be displayed with options to **Download**, **Edit** or **Remove**.





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Letter Library

Manage Case Rollover

Sync Email Notification and Audit Log

Forms Management

SQL Snapshot

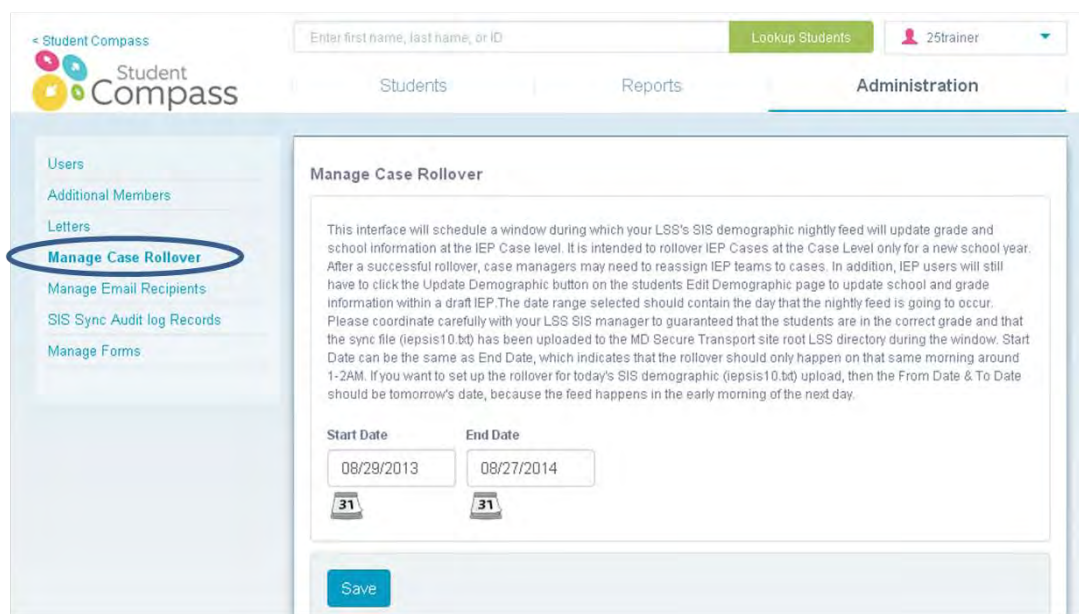
Addressing Duplicate Records

Inactivate Records

Manage Case Rollover

A **County Level/Data Manager with Admin permission** is able to schedule a date range to update the SIS demographic nightly feed which will bring the grade and school information at the IEP Case level up-to-date. This procedure is typically completed over the summer after the local school system has updated their student information system to reflect grade and/or school changes. However, a rollover can be scheduled at any time.

1. Click on the **Manage Case Rollover** link on the left navigation bar.



In the rollover interface, the date range selected should contain the day that the nightly feed is going to occur. Please coordinate carefully with your LSS SIS manager to guarantee that the students are in the correct school and grade and that the sync file (iepsis.txt) will be uploaded to the MD Secure Transport site root LSS directory during the window chosen.

Contrary to what is written on the screen, the rollover will push the following information to the case level:

- Resident County
- Resident School
- Service County
- Service School
- Grade
- SASID
- Middle name

The following will push to the IEP level for any open IEP or Amendment drafts:

- SASID
- Middle name

2. Select a **Start and End Date** from the drop-down lists. Start Date can be the same as End Date, which indicates that the rollover should only happen on that same morning around 1-2 AM. If you want to set up the rollover for today's SIS demographic (iepsis.txt) upload, then the Start Date & End Date should be tomorrow's date, because the feed happens in the early morning of the next day.

Deleting Records

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

3. Click the **SAVE** button.



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search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Letter Library

Manage Case Rollover

Sync Email Notification and Audit Log

Forms Management

SQL Snapshot

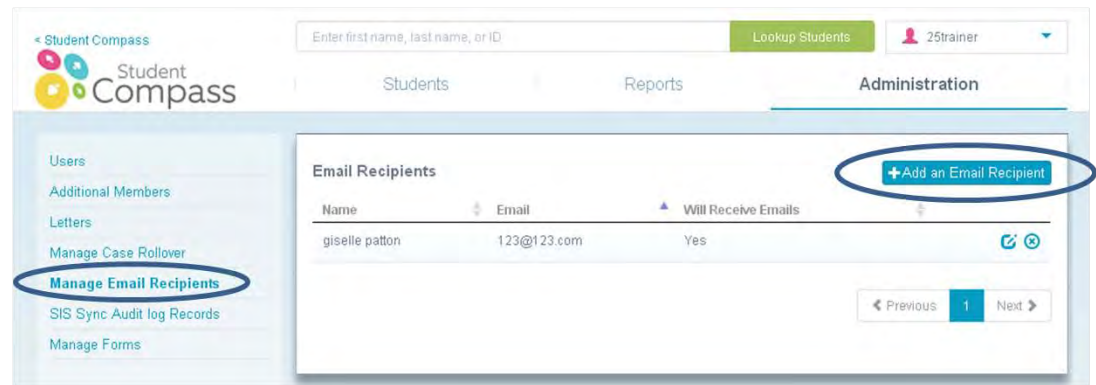
Addressing Duplicate Records

Inactivate Records

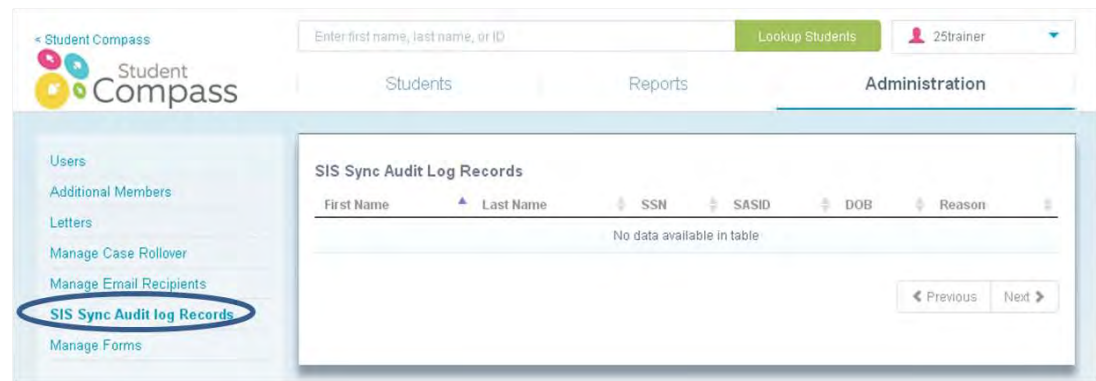
Sync Email Notification and Audit Log

A **County Level/Data manager** with Admin permission is able to indicate who will receive the daily email notification documenting the success of the previous night's file transfer. The email will indicate the number of demographic files successfully transferred and the number of files that were unsuccessful. To see the files that were not successfully loaded, go to **SIS Sync Audit Log Record**.

Choosing **Manage Email Recipients** shows who is currently receiving the email notifications of the previous night's file transfer and allows for the addition of any other persons who should receive the email notifications. To add additional people to receive the email, click the Add and Email Recipient button. There are buttons on the right of current recipients to edit or delete them.



The **SIS Sync Audit Log Record** indicates which files were not successfully added to the sis_db for the MD Online IEP because of duplication of first name, last name and date of birth or because of a duplicate SASID number.





Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Letter Library

Manage Case Rollover

Sync Email Notification and Audit Log

Forms Management

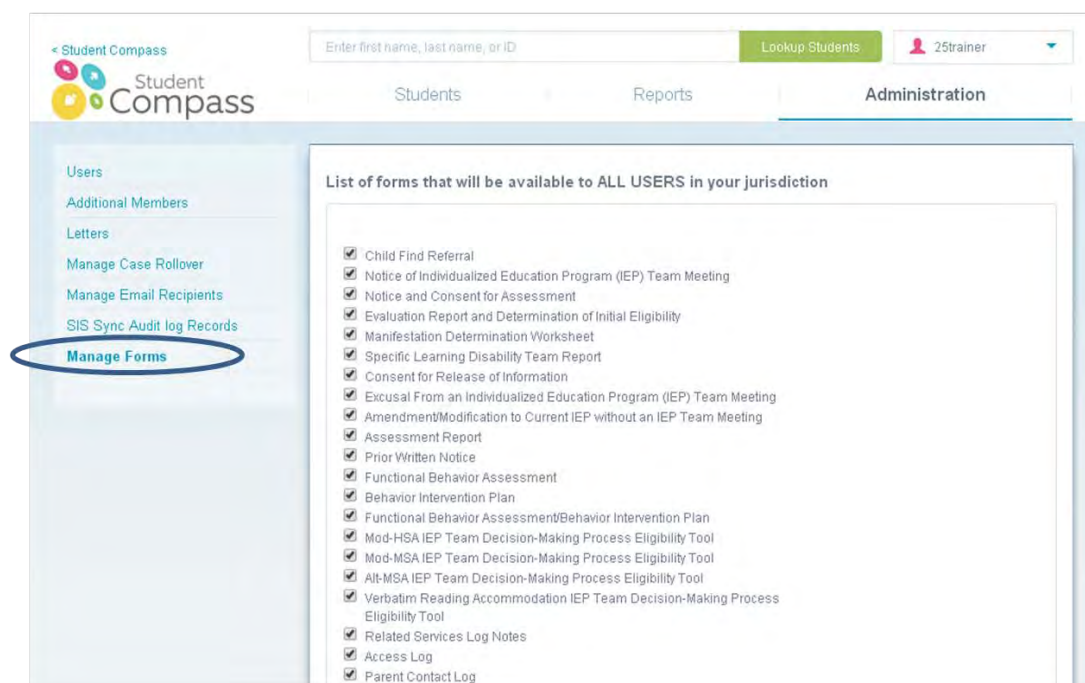
SQL Snapshot

Addressing Duplicate Records

Inactivate Records

Forms Management

The MD Online IEP system includes a collection of forms to support the IEP process. Local school systems have the option to use the forms included within the MD Online IEP system or forms developed internally. Since some systems use forms developed locally, a County Level/Data Manager with Admin permission can "hide" the corresponding MD Online IEP forms from view so users are not confused as to which form to use. After clicking Manage Forms from the left navigation menu in the Administration section, the County Level/Data Manager can uncheck the box next to the forms that should not be displayed. The MD Online IEP system defaults to having all forms available (checked) on the Forms screen.



Blank copies of the forms can be printed by choosing a student from the MD Online IEP search results and then choosing forms. Below the title of each form is an option to **Print Blank Form**. All forms can also be reviewed at: www.cte.jhu.edu/MDIEPDemo. After accessing a student from the Case Matrix: Cases tab, click the Forms and Logs button.

- Deleting Records

- Managing User Accounts

- Editing Demographic Information

- Technical Support & Troubleshooting

The screenshot shows the Student Compass interface for user '11trainer'. The main navigation bar includes 'Students', 'Monitoring', 'Meetings', 'Reports', and 'Administration'. The sub-navigation bar includes 'Notifications', 'Monitoring', 'Profile', 'IEP Summary', 'Meetings', and 'Forms and Logs'. The profile for 'Samantha Sample' is displayed on the left, including her role as 'Service School Case Manager' and 'Parents', her grade (10), and date of birth (04/13/1996). The 'Process Forms' section on the right lists various forms with counts and 'Complete Form' buttons. Two 'Complete Form' buttons are circled in red: the one for '(1) Child Find Referral' and the one for '(6) Notice of Individualized Education Program (IEP) Team Meeting'.





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Letter Library

Manage Case Rollover

Sync Email Notification and Audit Log

Forms Management

SQL Snapshot

Addressing Duplicate Records

Inactivate Records

SQL Snapshot

Each night IEP data from IEPs that were closed that day are uploaded to the SSIS database at MSDE. This is referred to as the MD Online IEP Snapshot or IEPXXSQL.zip file. The data is then available to any local school system using the MD Online IEP to be reviewed or utilized for further data analysis. To access this MD Online IEP Snapshot, access the Maryland Secure Server site, as well as access to a Microsoft SQL Server. For more detailed information regarding this process, download the following document:

[Using the MD Online IEP Nightly Database SQL Snapshot](#)



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Letter Library

Manage Case Rollover

Sync Email Notification and Audit Log

Forms Management

SQL Snapshot

Addressing Duplicate Records

Inactivate Records

Addressing Duplicate Records

Addressing Duplicates in the MD Online IEP through the Student Information System Database (SIS_DB)

Note: Student records in the MD Online IEP's SIS_DB can be updated or added to as often as nightly by syncing with a Local School System's Student Information System (SIS) file (iepsis10.txt).

The **first step** in each LSS's nightly sync is to exclude certain records from moving to the next step of the sync. Any record that duplicates on either a combination of "first name/last name/DOB" or State Assigned Student Identification (SASID) (with another record in the same iepsis10.txt file) is excluded from the sync.

The **second step** in each LSS's nightly sync matches and updates/adds records to the SIS_DB. The matching criteria used to sync the iepsis10.txt file's records to records already in the SIS_DB is the combination of "first name/last name/DOB". If that combination of fields exactly matches an existing record, then the existing record can be updated if any new demographic information exists. If a combination of "first name/last name/DOB" for a record in the iepsis10.txt file doesn't match an existing record in SIS_DB, then it is added to SIS_DB as a newly created record.

Note: State Assigned Student Identification (SASID) is not a matching criterion for determining whether a record for a student already exists in the SIS_DB.

Therefore, if a change is made to a student's "first name/last name/DOB" in the LSS's SIS then it follows that the edited record will be included the next iepsis10.txt file. If a corresponding change in the SIS_DB record is not made manually, then during the next nightly sync the changed record will not match the existing SIS_DB record on "first name/last name/DOB". This scenario allows a new record to be created in the SIS_DB, and effectively creates a duplicate.

When duplicates are found at the SIS_DB level, use the corrective action listed below that matches the duplication scenario encountered:

1. Duplicates at SIS_DB level but no IEP for either duplicate record

Action: Remove the record that does not match "first name/last name/DOB" in LSS SIS

2. Duplicates at SIS_DB level and an IEP exists for correct record (as compared to the "first name/last name/DOB" in current LSS SIS)

Action: Remove the record without the IEP

3. Duplicates at SIS_DB level and IEP exists for the incorrect record (as compared to the current LSS SIS)

Action:

- Remove the good record that matches LSS SIS "first name/last name/DOB" from SIS_DB (the one without an IEP)
- Edit SIS_DB level demographics to match current "first name/last name/DOB" in LSS SIS
- Update to IEP Demographics (Case) Level
- If draft has been started then copy demographics into the IEP

4. Duplicates at SIS_DB level and both student records have been brought to IEP level, but only one has a closed IEP.

- Remove the student record that doesn't have a closed IEP
- If the record you removed matched the LSS SIS "first name/last name/DOB" then modify the remaining student as follows:
 - Edit SIS_DB level demographics to match current "first name/last name/DOB" in LSS SIS
 - Update to IEP Demographics (Case) Level
 - Copy demographics into the draft IEP

5. Duplicates at SIS_DB level and both students have been brought to IEP level, and both have a closed IEP.

Deleting Records

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

- a. Determine which record is more recent. The more recent record will be the one that you want to remain active moving forward.
- b. Handling the old record and inactivating
 1. Edit the last name of the older record to " (LAST NAME) DO NOT USE" and remove SASID
 1. Edit the last name and remove SASID in SIS_DB search results
 2. Update to IEP Demographics (Case) Level
 2. Click the "Inactivate" link for this record in the Search for a Case results screen
- c. Handling the more recent record, if necessary:
 1. Edit SIS_DB level demographics to match current "first name/last name/DOB" in LSS SIS
 2. Update to IEP Demographics (Case) Level
 3. Copy demographics into the draft IEP

To print a copy of this page, click [here](#).



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Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Letter Library

Manage Case Rollover

Sync Email Notification and Audit Log

Forms Management

SQL Snapshot

Addressing Duplicate Records

Inactivate Records

Inactivate Records

County Level/Data Managers with "Edit Demographics" permission have the ability to inactivate records at the case level. This may be helpful to "hide" student records when running from some of the reports. Examples of reasons to inactivate a record could be:

- the student has graduated
- the student has moved but the local school system does not have a request for records from a new school system
- the student has been exited from receiving special education services

1. From the **Student** section, click **Case Matrix**.

2. Using **Search** tab, enter the student search criteria to locate the student's record. The search will be of students in the IEP database.

3. After searching for the student record, there will be a list of possible matches with the option to **Inactivate** the record to the right of the student's name.

If the current record has been inactivated, there will be the option to reactive the record on this screen.

Note: Clicking on the word **Inactivate** will inactive the case; whereas, clicking on the word **Activate** will make the case active again.

The screenshot shows the Student Compass interface. At the top, there is a search bar with the text "Enter first name, last name, or ID" and a "Lookup Students" button. Below the search bar are tabs for "Students", "Reports", and "Administration". The "Students" tab is selected, and the "Case Matrix" sub-tab is active. The interface shows a table of search results for "Carol Anne" county. The table has columns for "Student", "Service School", "IEP Case Manager", "Last IEP Team Meeting", "Annual Review Date", and "Projected Reevaluation Date". Three students are listed: Adam Smith, Amy Smith, and Anna Smith. Each student's name is followed by an "Inactivate" button, which is circled in blue in the image. There are also checkboxes for "Active", "Not eligible", "Exited", "Eligibility 3,4,6", and "Cases that include me as a team member" at the top of the results table.



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Letter Library

Manage Case Rollover

Sync Email Notification and Audit Log

Forms Management

SQL Snapshot

Addressing Duplicate Records

Inactivate Records

Deleting Records and Forms

IEPs developed and closed in the MD Online IEP system are archived and are readily available for review as a read only document. **Closed IEPs** or **Amendments** cannot be edited or deleted from the MD Online IEP system. The system is designed to assure a closed IEP is kept in an archive for the student and all historical data is preserved. To locate an archived IEP, see [Locating Active or Archived IEP in the User Guide](#).

County Level/Data Managers with Forms Administrator permission are able to delete draft or completed forms upon request.

The screenshot shows the 'Student Compass' interface. At the top, there is a search bar with the text 'Enter first name, last name, or ID' and a 'Lookup Students' button. The user is identified as '25trainer'. Below the search bar are tabs for 'Students', 'Reports', and 'Administration'. The 'Students' tab is active, showing a 'Case Matrix' view. On the left, there is a sidebar for 'County Level/Data Manager' with the county 'Carol Anne' and a 'LINKS' section containing various activity links. The main area displays a table of search results with columns for 'Student', 'Service School', 'IEP Case Manager', 'Last IEP Team Meeting', 'Annual Review Date', and 'Projected Reevaluation Date'. Three students are listed: Adam Smith, Amy Smith, and Anna Smith. Each row has an 'Inactivate' button. A blue circle highlights the 'Inactivate' button for Amy Smith, which also has a small 'x' icon next to it.

Student	Service School	IEP Case Manager	Last IEP Team Meeting	Annual Review Date	Projected Reevaluation Date	Action
Adam Smith			12/02/2013			Inactivate
Amy Smith			11/29/2007			Inactivate
Anna Smith						Inactivate



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Add/Edit IEP User

User Access Permissions

Add Schools to User Accounts

Assign a Caseload to Teacher Accounts

Remove/Inactivate Users

Add/Edit Additional Members

Managing User Accounts

Every user of the MD Online IEP must have a personal account to facilitate logging into the system. That account can be established by another user at the same level or one at higher than the account that is to be created. When creating an account, certain permissions must be granted through the user account and is usually determined by the local school system.

This section of the User Guide will provide information regarding:

- User Account Permissions
- How to Add/Edit IEP User
- How to Add/Edit Additional IEP Team Members
- How to Add Schools to User Accounts
- How to Assign a Caseload to Teacher Accounts
- How to Remove/Inactivate User Accounts



Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Add/Edit IEP User

User Access Permissions

Add Schools to User Accounts

Assign a Caseload to Teacher Accounts

Remove/Inactivate Users

Add/Edit Additional Members

Add/Edit IEP User

Adding or editing user accounts for the MD Online IEP begins by clicking the **Administration Section in Student Compass**. The **Administration section** is only accessible if the user has been assigned administration permissions. After clicking the Administration section, the **Users: Search Results page** will be displayed and existing users can be edited or new users added.

Add a New User:

To add a user to the MD Online IEP system, click the **Add User button**. Enter information in all the fields, in order to have a complete user account, and then click the **SAVE button**. If certain information is unknown or changes, this can be updated through the Edit User process. The required fields are: First Name, Last Name, User Group, Email, Username and Password. For School Based Administrators or Teachers choosing to create an account for someone, the County and School will be filled in by default. County Level/Data Managers will have only County filled in by default and will need to add School to School Based Administrator or Teacher accounts. The error messages will be displayed if all required fields are not completed correctly.

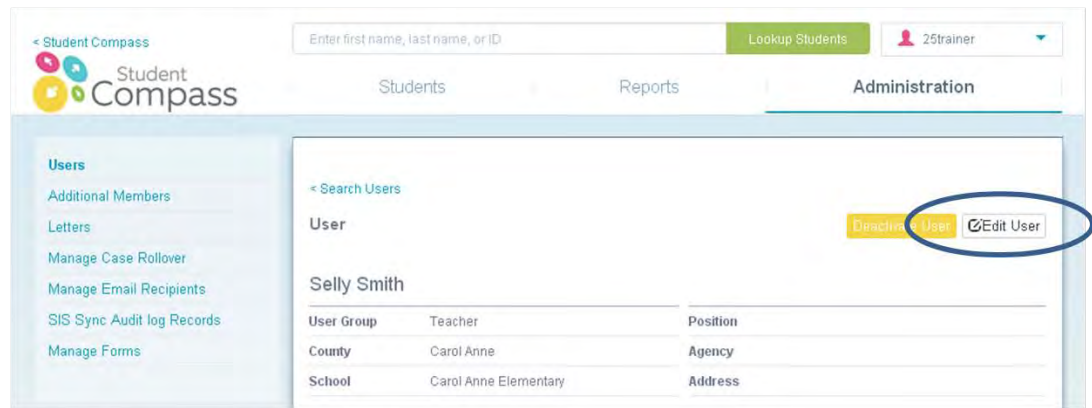
The screenshot shows the 'Administration' section of the Student Compass interface. On the left is a sidebar with various user management options. The main content area is titled 'Users' and includes a search bar, radio buttons for 'User Status' (Active, Inactive, All), and input fields for 'First Name', 'Last Name', 'Residence County', 'Residence School', and 'Public Schools'. A blue button labeled '+Add a New User' is circled in blue in the top right corner of the main content area.

Editing a User:

To edit an existing user, click the name of the user that is to be edited. Click the **Edit User button** and update the fields according to the most recent information. Click on the **SAVE button**.

Editing Demographic Information

Technical Support & Troubleshooting



The screenshot shows the Student Compass Administration interface. At the top, there is a search bar for users and a 'Lookup Students' button. The navigation menu includes 'Students', 'Reports', and 'Administration'. On the left, a sidebar lists various user management functions. The main content area displays the details for a user named 'Selly Smith', including their user group (Teacher), position, county (Carol Anne), agency, and school (Carol Anne Elementary). Three action buttons are visible: 'Deactivate User' (disabled), 'User' (highlighted with a blue circle), and 'Edit User'.

The following 5 user groups are available for access to the Maryland Online IEP system:

MSDE Staff - These users can access any student in the IEP system via a search.

County Level/Data Manager - These users supervise or work with students enrolled in a public agency or manage the special education data for a Local School System. There are many user access rights available that can be assigned to a County Level/ Data Manager.

School-based Administrator - These users work at the school level. They are administrators or teachers/providers who are working with students within a particular school and can be assigned to more than one school/location. They can view data of any student in the school and can be given rights to add students to the IEP system.

Teacher Level - These users work at the classroom or caseload level. They are teachers/providers who are working with students in one or more schools. They have rights to view data for only students who are assigned to their caseload. A student can be added to the teacher caseload by a SBA or County Level/Data manager. Teachers can be assigned to more than one school/location. Teachers can not add students to the IEP system.

Nonpublic User - These users work at nonpublic schools and can be a School Based Admin or Teacher. Nonpublic users may only add students to the IEP system who are from Local School Systems (LSS) not using the MD Online IEP. Students from LSS's using the MD Online IEP will have an active IEP before placement at the nonpublic and therefore the case may be accessed in the usual lookup manner.

Once a **User Level** is chosen, the corresponding permissions that are available for that group will be displayed at the bottom of the screen. For more information regarding permissions see [User Access Permissions in the User Guide](#).



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MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Add/Edit IEP User

User Access Permissions

Add Schools to User Accounts

Assign a Caseload to Teacher Accounts

Remove/Inactivate Users

Add/Edit Additional Members

User Access Permissions

Note: Read Only user accounts can be created by not assigning any permissions to the user's login account.

Once a user group is determined, an appropriate list of permissions will appear at the bottom of the screen. The person created the new user account checks the appropriate permissions to be assigned to the user account. The table below indicates which permissions can be assigned to each type of user account. If no permissions are checked, the account would be for read only access.

Permissions	Can be assigned to:		
	County Level/Data Manager	School Based Administrator	Teacher
Admin Access	X	X	X
Can Edit Cases	X	X	X
Can Create a Child	X	X	
Manage Case Rollover	X		
Edit Demographics	X		
Manage Sync Email Notification	X		
Data Manager Amendment	X		
Forms Administrator	X		
Upload Files to Cases	X	X	X

Definitions of **Permissions** that can be assigned to users are as follows:

Admin Access - This role can be granted to any level of user (County Level/Data Manager, School Based Administrator, or Teacher). It allows a user to add/edit users at or below his/her level of user. In addition to allowing adding/editing users, this role will allow a County Level User:

- To add or edit letters added to the **Letter Library**
- To view **SIS SYNC AUDIT LOG RECORDS** of students who did not successfully sync in the most recent sync with nightly demographic upload from LSS SIS
- To reactivate users who had been removed from the list of users
- To manage which forms are available to users in their local school system

Can Edit Cases - This role can be granted to any level of user (County Level/Data Manager, School Based Administrator, or Teacher). It allows a user to edit IEPs and forms for any student he/she can access. Users who are not granted this access role have read only access to IEPs and forms for any student he/she can access.

Can Create a Child - Can be assigned to **County Level/Data Manager** and **School Based Administrators** who need the ability to manually add a student to the IEP system database.

Manage Case Rollover -Can only be assigned to **County Level/Data Managers with Admin access**. This permission allows the County Level/Data Manager with Admin Access to schedule the school year rollover of grade and school to IEP case level.

Edit demographics - Can only be assigned to **County Level/Data Managers**. This permission allows County Level user to do the following:

- to edit demographics at the SIS_DB level and at the IEP case level
- to remove students from the SIS_DB who have not been brought to case level
- to remove a student's record if no closed IEP exists for the student if approved by local school system Special Education Director (per MSDE).

Manage Sync Email Notification - Can only be assigned to County Level/ Data Managers with Admin Access. This permission allows the County Level user with Admin Access to add/edit/delete email address for those who receive nightly demographic sync notification emails.

Data Manager Amendment - Can only be assigned to County Level/Data Managers. This permission allows a County Level user to change the following fields via an Amendment:

- Case Manager on the Close IEP screen
- Scheduled Meeting Date(s), and Annual Review Dates on Close IEP screen
- Dates on the Initial Eligibility page

When a County Level user with this role closes an Amendment, it will be listed as "Data Manager Amendment" under the IEP date on View Past IEP's screen.

Forms Administrator - Can only be assigned to County Level/Data Managers with Admin Access. This permission allows a County Level user with Admin Access to select the Administrative Module Forms that are available to all users in his/her LSS. By default all available forms are available to an LSS. LSS are tasked to decide which forms are available to users.

Additionally the County Level user with Admin Access can delete Administrative Module forms created in error. This functionality deletes forms permanently from the database.

Upload Files to Cases - This role can be granted to any level of usership (County, School Based Administrator, or Teacher). It allows a user to upload files to a student's File Uploads page where documents (e.g.. scanned signature pages, scanned forms, etc) can be added to the student's profile.

Note: Notify User by Email - This is a field above the permissions and is used indicate is an email notification is to be sent to the user's email address on record. The email will notify them that a MD Online IEP system login has been created or that their user account has been modified.





- MD Online IEP User's Guide
- Orientation
- Getting Started
- Locating a Student's Case
- Student Compass: Caseload Level
- Student Compass: Student Level
- Meetings
- IEP Development
- Identifying Information
- Eligibility
- Participation
- Present Levels
- Special Considerations
- Goals
- Services
- LRE and Placement Summary
- Additional IEP Functions
- Transferring and Exiting Students
- Forms and Logs
- Reports
- Additional Case Level Functions
- County Level/Data Manager Functions
- Managing User Accounts
 - Add/Edit IEP User
 - User Access Permissions
 - Add Schools to User Accounts**
 - Assign a Caseload to Teacher Accounts
 - Remove/Inactivate Users
 - Add/Edit Additional Members

Add Schools to User's Account

School Based Administrators and Teachers can be assigned to more than one school within their local school system with one login to the MD Online IEP. A County Level/Data Manager with Admin Access permission will be able to assign the schools to the user account.

1. Locate the user's account on the **Users page of the Manage Users section in Administration**.
2. Click on his/her name to display the details of the user account and click the **Add Schools button**.

Selly Smith

User Group	Teacher	Position	
County	Carol Anne	Agency	
School	Carol Anne Elementary	Address	

Contact & Account Information

Home Phone		Username	sally
Work Phone		Admin Access	No
Cell Phone		Can Edit Cases	Yes
Email	sally@gmail.com	Upload Files to Cases	No

Additional Schools

County	School
No data available in table	

[+Add a School](#)

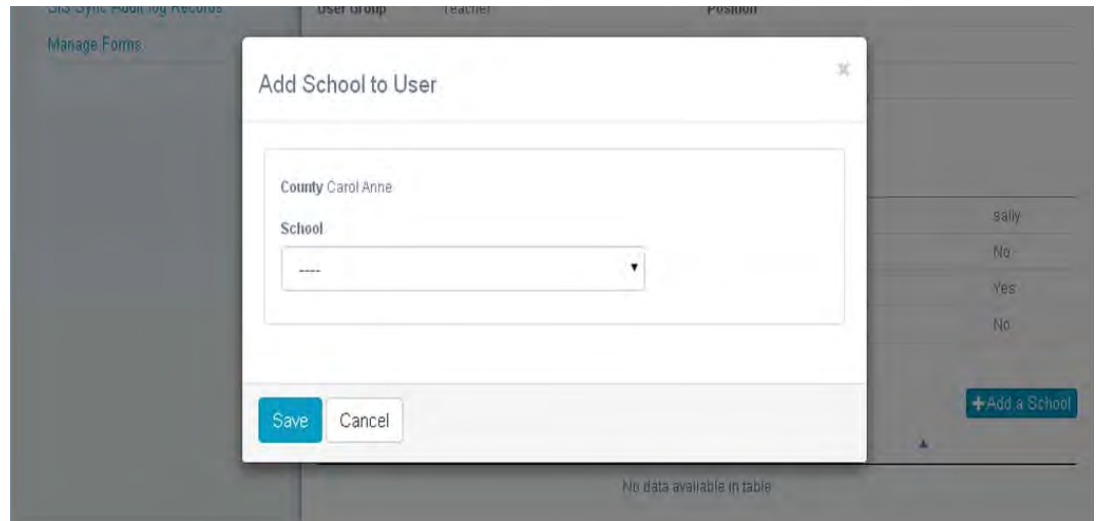
Case Load

Student Name	DOB	R-County	R-School	S-County	S-School
No data available in table					

3. **Select the county and school**, and click the **SAVE button**. This school will now appear on the User Details page in the **Additional Schools** section. The option to remove additional schools from a user's account is also available in this section. Click the **Remove button** on the same line as the school to remove it.

Editing Demographic Information

Technical Support & Troubleshooting



Electronic Learning Community (ELC) © 2011 | Johns Hopkins University School of Education | Center for Technology in Education



- MD Online IEP User's Guide
- Orientation
- Getting Started
- Locating a Student's Case
- Student Compass: Caseload Level
- Student Compass: Student Level
- Meetings
- IEP Development
- Identifying Information
- Eligibility
- Participation
- Present Levels
- Special Considerations
- Goals
- Services
- LRE and Placement Summary
- Additional IEP Functions
- Transferring and Exiting Students
- Forms and Logs
- Reports
- Additional Case Level Functions
- County Level/Data Manager Functions
- Managing User Accounts
 - Add/Edit IEP User
 - User Access Permissions
 - Add Schools to User Accounts
 - Assign a Caseload to Teacher Accounts**
 - Remove/Inactivate Users
 - Add/Edit Additional Members

Assign a Caseload to Teacher Accounts

County Level/Data Managers and School Based Administrators with Admin Access are able to assign a teacher level user a case load of student cases. The County Level/Data Manager or School Based Administrator must navigate to the **Administration** section and locate the teacher user on the **Users** page and click the users name to view the details. Scroll to the bottom of the page to **view the Caseload** section and to view all cases assigned to the user.

Click **Add Case** button then select the school and then the student's name or group of students to assign the case(s) to the teacher.

The screenshot shows the user profile for Selly Smith. On the left, there are navigation links: Manage Email Recipients, SIS Sync Audit log Records, and Manage Forms. The main content area is divided into sections:

- User Information:** User Group (Teacher), Position, County (Carol Anne), Agency, School (Carol Anne Elementary), Address.
- Contact & Account Information:** Home Phone, Work Phone, Cell Phone, Email (sally@gmail.com), Username (sally), Admin Access (No), Can Edit Cases (Yes), Upload Files to Cases (No).
- Additional Schools:** A table with columns for County and School, and a '+Add a School' button. Below the table, it says 'No data available in table'.
- Case Load:** A table with columns for Student Name, DOB, R-County, R-School, S-County, and S-School. Below the table, it says 'No data available in table'. A '+Add Students to Case Load' button is circled in red.

Select the **School and the Teachers IEP Team Title** from the list of available options. A list of students will be displayed at the bottom. The County Level/Data Manger or School Based Administrator will use the checkbox to the left of each student's name to add the students to the Teacher level user's caseload. Click the **SAVE** button at the bottom of the page. All students selected will appear in the Case Load section at the bottom of the Users page.

To remove a student from a Teacher's caseload, click the **Delete** button on the far right of the student's name.

Editing Demographic Information

Technical Support & Troubleshooting

Add New Students to Teacher's Case Load

School: Carol Anne Elementary

Teacher's IEP Team Title: IEP Case Manager

Student Name	DOB	R-County	R-School	S-County	S-School
<input type="checkbox"/> Jenny Adams	04/18/1999	Carol Anne	Carol Anne Elementary	Carol Anne	Carol Anne MANSEF Middle
<input type="checkbox"/> Renard Adams	05/06/1972	Carol Anne	Carol Anne Elementary	Prince George's	Jessie B. Mason Special Center
<input type="checkbox"/> Sam Am	01/01/2007	Carol Anne	Carol Anne Elementary	Carol Anne	Carol Anne Middle
<input type="checkbox"/> Captain America	01/01/1970	Carol Anne	Carol Anne Elementary		
<input type="checkbox"/> Mary Anderson	03/02/1998	Carol Anne	Carol Anne Middle	Carol Anne	Carol Anne Elementary
<input type="checkbox"/> Polly Anna	11/07/2008	Carol Anne	Carol Anne Elementary	Carol Anne	Carol Anne Elementary

S-School list: Carol Anne Middle, Princess Ann Primary, Carol Anne Middle, Carol Anne MANSEF Elementary, Carol Anne MANSEF Elementary



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Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Add/Edit IEP User

User Access Permissions

Add Schools to User Accounts

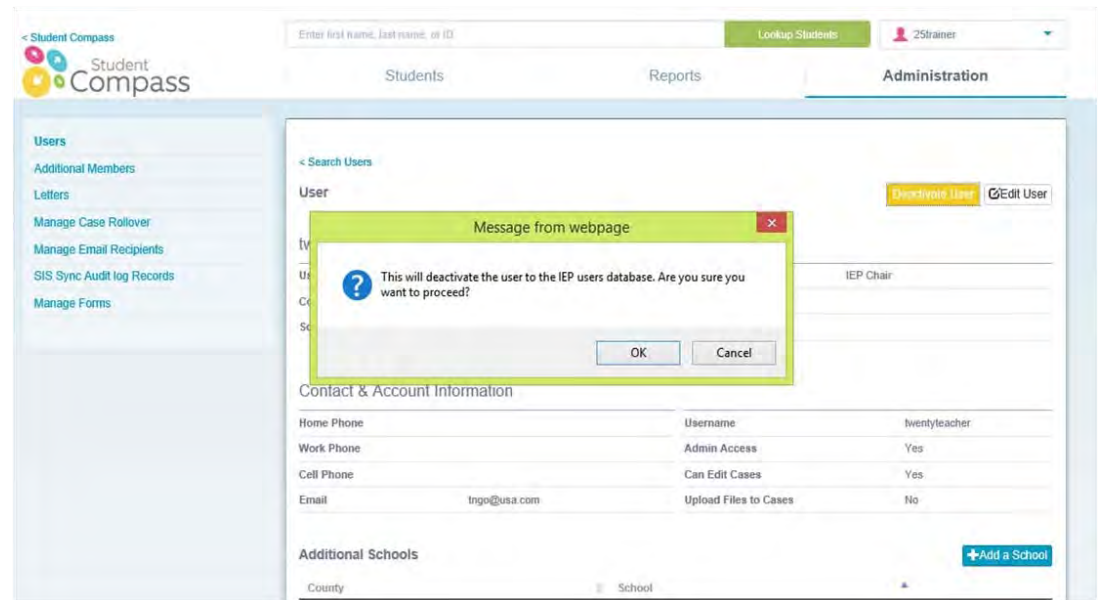
Assign a Caseload to Teacher Accounts

Remove/Inactivate Users

Add/Edit Additional Members

Remove/Inactivate Users

MD Online IEP users with Admin Access can inactivate users by selecting the **Deactivate User** button, located on the **User Detail** page. If the user needs to have the account reinstated, the **Activate User** button can be chosen on this screen.





MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Add/Edit IEP User

User Access Permissions

Add Schools to User Accounts

Assign a Caseload to Teacher Accounts

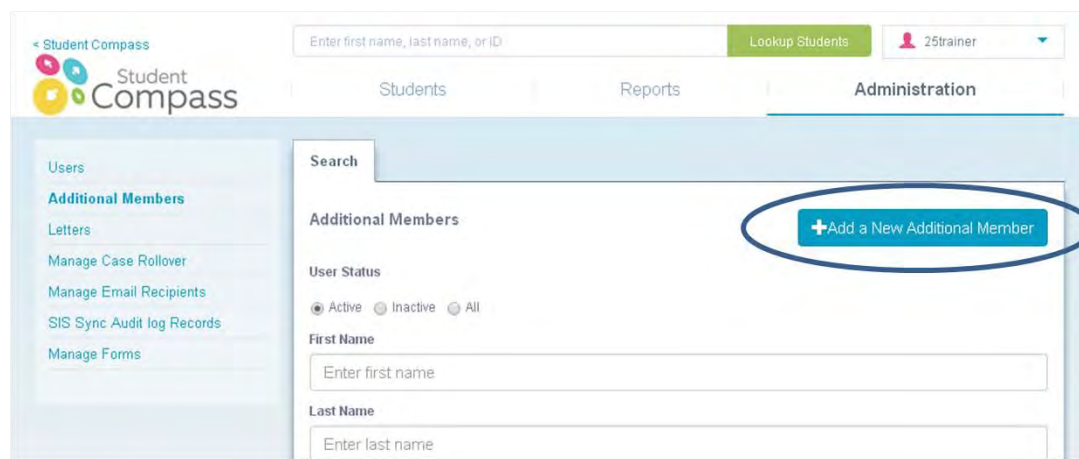
Remove/Inactivate Users

Add/Edit Additional Members

Add Additional IEP Team Members

When identifying the members of a student's IEP team through **Add a New Team Member** on the **Schedule a Meeting** page in the **Meetings** section, a drop-down list is available for members who have a login to the MD Online IEP system and access to the student's record. As a convenience, additional team members who do not need a login account can be added through the **Additional Team Members** tab in the **Manager Users of the Administration** section. Some examples of Additional Team Members might be: general educator, school psychologist, school nurse, guidance counselor. They are generally IEP team members who are not responsible for entering information into the student's IEP in the MD Online IEP system. Their names would be available on a drop-down list through the **Schedule a Meeting** page.

1. Locate **Manage Users** on the left navigational panel of the **Administration** section.
2. Click the **Additional Team Members** tab.



The screenshot shows the 'Student Compass' interface. At the top, there is a search bar with the text 'Enter first name, last name, or ID' and a 'Lookup Students' button. Below this, there are tabs for 'Students', 'Reports', and 'Administration'. The 'Administration' tab is selected. On the left side, there is a sidebar menu with options like 'Users', 'Additional Members', 'Letters', 'Manage Case Rollover', 'Manage Email Recipients', 'SIS Sync Audit log Records', and 'Manage Forms'. The 'Additional Members' option is highlighted. In the main content area, there is a 'Search' section with a dropdown menu. Below that, there is a section titled 'Additional Members' with a radio button for 'User Status' (Active, Inactive, All) and input fields for 'First Name' and 'Last Name'. A blue button with a plus sign and the text '+Add a New Additional Member' is circled in blue.

3. Complete the form with a minimum of first and last names, school and position and click the **SAVE** button.

The screenshot shows the Student Compass web application interface. At the top, there is a search bar for users and a navigation menu with 'Students', 'Reports', and 'Administration'. The 'Administration' section is active, and the 'Additional Members' page is displayed. The page title is 'Additional Member' with a search link. The form includes fields for Title, First Name, Middle Initial, Last Name, Residence County (set to Carol Anne), and Residence School (with radio buttons for Public and Private).

Editing Demographic Information

Technical Support & Troubleshooting

To edit an Additional Member, click the name of the person listed on the Additional Members page. The account can be edited or inactivated. To delete the Additional Member, click the deleted button to the right of the person listed on the Additional Members page.



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EDUCATION



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Editing at the Case Level

Editing Student Information at the sis_db Level

Technical Support & Troubleshooting

Edit Demographic Information

This section will explain how to edit student demographic data within the MD Online IEP. There are the following two databases with student information within the MD Online IEP:

1. **The IEP database** - The IEP database contains student records with IEPs. This is also called the **Case Level of the MD Online IEP system**.
2. **The Student Information System database** - The Student Information System database contains all student records from a Local School System. This is also called the **sis_db**.

Different user levels within the MD Online IEP have different access to student data in the IEP database and the Student Information System database. School-based administrator and Teacher level users may only edit a student's Residence and Service County and School in order to transfer a student to another school within the county or to another school in another county. County Level/Data Manager level users may edit all of a student's demographic information at the Case and the sis_db levels.



Maryland State Department of Education
Maryland Online IEP
 MSDE Division of Special Education and Early Intervention Services

MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Editing at the Case Level

Editing Student Information at the sis_db Level

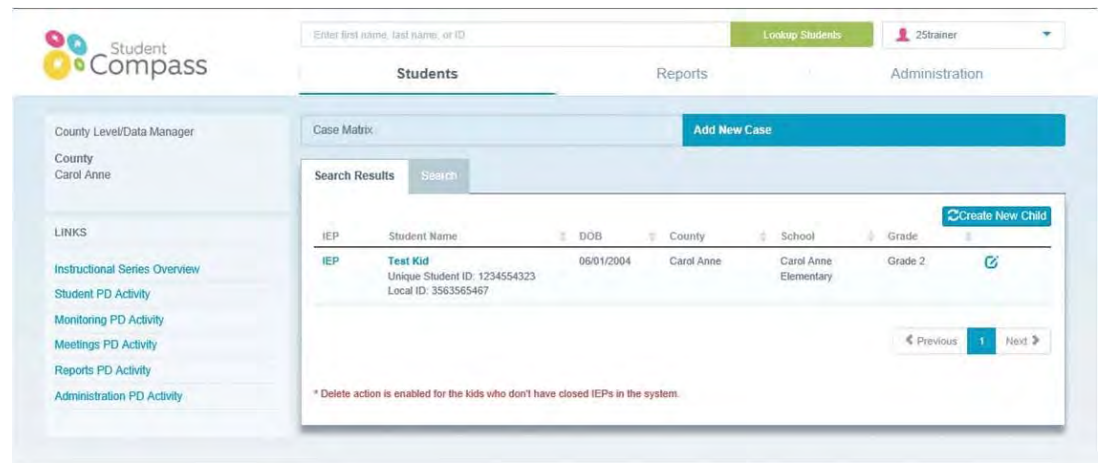
Technical Support & Troubleshooting

Editing at the Case Level

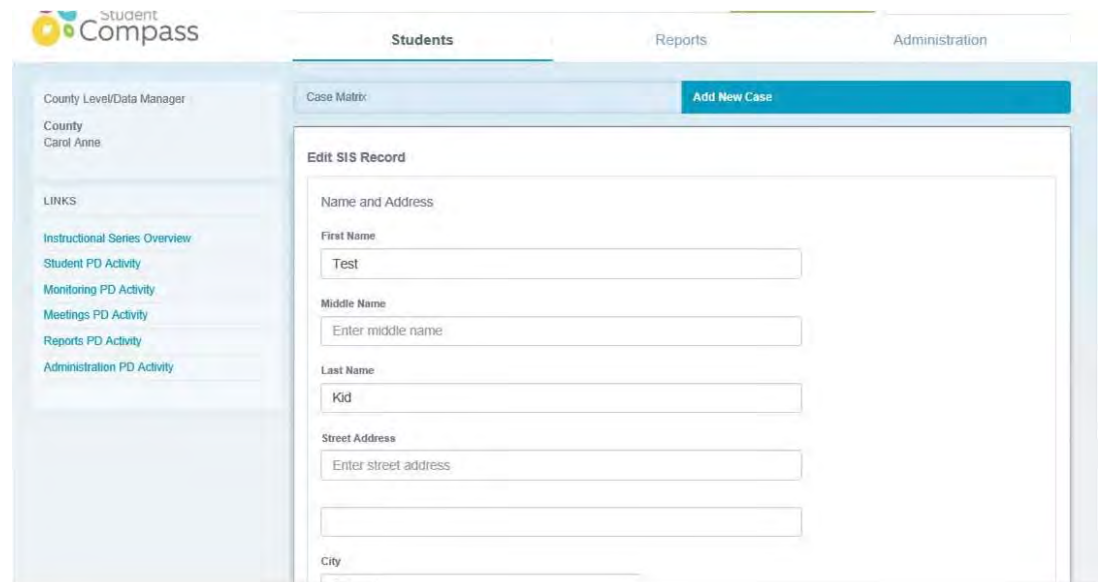
Note: School-Based Administrator and Teacher users may only edit a student's Residence and Service County and School in order to transfer a student to another school within the school system or to another school in another school system.

County Level/ Data Manager with Edit Demographics permissions may edit all of a student's demographic information at the Case (IEP) level of the IEP Data base.

To access a student's demographics at the **Case Level**, locate the student and click the **Demographics** button. Click the **Edit Demographics** button.



Depending on the user's access level, some fields may be grayed out or not editable. **Only County Level/Data Manager with Edit Demographics permission added to the user account will be able to edit more than Resident County and School and Service County and School.**



Click the **SAVE button** to save the changes to the student record.

Note: To update demographics from data in the sis_db, choose **Update** button at the top of the **Edit Demographics** screen. A new window will pop up. Choose the **Update** button at the bottom of the pop up window. Then **Save** the **Edit Demographics** screen.

To update demographics in a draft **Work on Next IEP** or **Amendment**, choose the **Copy Demographic Data** on the *Student and School Information* screen in the IEP and **Save**.



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search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Editing at the Case Level

Editing Student Information at the sis_db Level

Technical Support & Troubleshooting

Editing Student Information at the sis_db Level

Note: County Level/ Data Manager with Edit Demographics permission may edit all of a student's demographic information at the sis_db level.

1. To access a student's demographics at the sis_db level, search for the student using **Add New Case**. More information for locating a student at the sis_db level is included in [Add New Case in the User Guide](#).

2. Choose **Edit** to the right of the student's name to access Edit SIS Record page.

The screenshot shows the 'Student Compass' interface for a user named 'cte_sa'. The main navigation tabs are 'Students', 'Monitoring', 'Meetings', 'Reports', and 'Administration'. The 'Students' tab is active, and the profile for 'Alex Samplea' is displayed. The 'Profile' sub-tab is selected, showing a 'Demographics' section. A button labeled 'View/Edit Demographics' is circled in blue. The demographics table includes fields for DOB (01/01/2010), Parent from SIS Feed (Samplea), Email Address (email@mail.com), Mailing Address (123 Main Str., Apt. 102, Montgomery, MD 45000), Residence School (Brunswick Middle), Service School (Brunswick Middle), Grade (7), Primary Disability, and Areas Affected by Disability. Below the demographics section are tabs for 'Recent Logs and Forms', 'File Uploads', 'Case Access History', and 'IEP Team'. The 'File Uploads' section has an 'Add a File' button.

3. Edit as needed and click on the **Save** button.

The screenshot shows the 'Student Compass' interface for a user named '15trainer'. The main navigation tabs are 'Students', 'Monitoring', 'Meetings', 'Reports', and 'Administration'. The 'Students' tab is active, and the profile for 'Alex Samplea' is displayed. The 'Profile' sub-tab is selected, and the 'Edit Demographics' section is active. A button labeled 'Update Demographics from SIS' is circled in blue. The 'Name and Address' section has input fields for 'First Name' (Jane) and 'Middle Name' (Kelly).

Note: Changes made to the student record at the sis_db do not automatically transfer to the case level (**Edit Demographics** screen) or the draft IEP. Changes must be imported into the **Edit Demographics** screen by using the **Update** button on the **Edit Demographics** screen. Choosing **Copy Demographic Data** button on the **Student and School Information** screen of the IEP to update the information in the draft document.

Note #2: Changes made to the sis_db of the MD Online IEP **do not** update or change any demographics in the school system's student information system. Contact your local student information system administrator if demographic changes need to be made there.



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EDUCATION



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Password Recovery

Password Changes

IEP Process Questions

Troubleshooting and Technical Support

If you are experiencing technical difficulties with the behavior of the MD Online IEP system, please contact your school or district designated person (often the Special Education Data Manager).

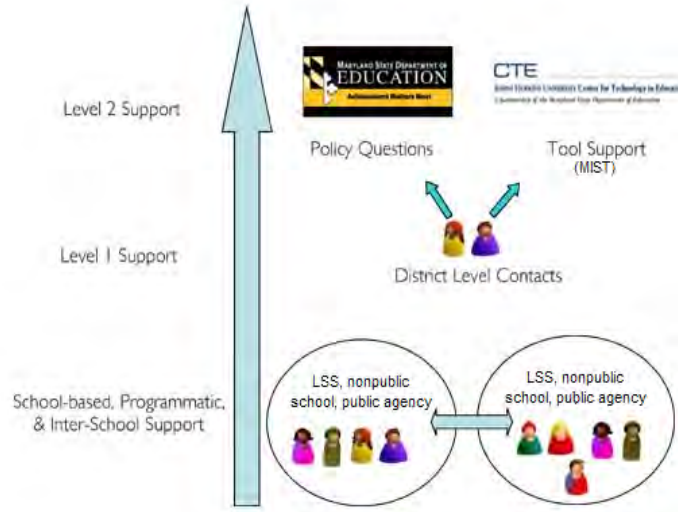
To prepare for reporting a technical issue, consider the doing the following:

- Do you have the most recent version of the browser? Check the version of your browser and update it if it is not the most recent. MD Online IEP system work with Internet Explorer 10.0 or higher.
- Disable pop up blockers.
- Clear browser history and cache.
- Only have 1 browser session active for the MD Online IEP system. If there are multiple sessions for the MD Online IEP system, the sessions will all switch to the student in the active session and this will most likely cause data issues.
- Close out of all programs and restart your computer. Repeat the steps you were attempting to do.
- Take a screenshot or write down any error messages you receive. To take a screenshot of your monitor use the Print Screen button on your computer. Screenshots can be pasted into Word documents and/or attached to e-mails.
- Note other programs that were open at the time the problem occurred.
- Try to repeat your steps on another computer or with a different internet browser. Does it work on that computer? Does it work in Firefox, Safari, or Google Chrome - versus Internet Explorer?
- Think about the computer specifications of the computer you are using. In other words, does the computer have a current operating system?

Level One Support is the school and/or school district's responsibility - either the district help desk, if one exists, or the MD Online IEP administrator can serve this role. The MD Online IEP administrator should document and communicate support procedures to all users. If Level One Support determines that the problem isn't related to the Maryland Online IEP, but is hardware, system software, or a networking problem, the district's normal process for reporting these types of problems and for getting support must be communicated to the user.

Level Two Support is considered to be CTE. Issues regarding IEP records or "bugs" in the system would be reported to the MD Online IEP Support Tracking System (MIST). Designated users at the district level have been identified as points of contact for communication with the MD Online IEP Support Tracking system (MIST)

Support Models for the MD Online IEP
MD Online IEP Implementation and Support Model
(Local School Systems)





Maryland State Department of Education
Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services

search the site



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Password Recovery

Password Changes

IEP Process Questions

Password Recovery

For password recovery, use the **Forgot Password link** on the login screen of the MD Online IEP or the Single Sign-on Portal.

Maryland Online IEP
MSDE Division of Special Education and Early Intervention Services

Username

Password [Forgot your password?](#)

Login

This application was developed and produced by the MSDE, Division of Special Education/Early Intervention Services, in collaboration with the Johns Hopkins University/Center for Technology in Education. IDEA Part B Grant #H0270900035A is funded by the U.S. Department of Education, Office of Special Education and Rehabilitative Services. The views expressed herein do not necessarily reflect the views of the U.S. Department of Education or any other federal agency and should not be regarded as such. The Division of Special Education/Early Intervention Services received funding from the Office of Special Education Programs, Office of Special Education and Rehabilitative Services, U.S. Department of Education.

Please read the following confidentiality statement:
 An individual student's IEP developed through this online process constitutes an educational record. Each participating agency and participant or user of the Online IEP shall protect the confidentiality of personally identifiable information in accordance with federal regulations 34 CFR §99.34 C.F.R. §§ 300.610 through 300.627, and Maryland regulation COMAR 13A.08.02.

Moving Maryland Forward
 Maryland's Longitudinal Accountability and Decision Support System (LADSS) Single Sign-On Portal

Username

Password [Forgot your password?](#)

Login



Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

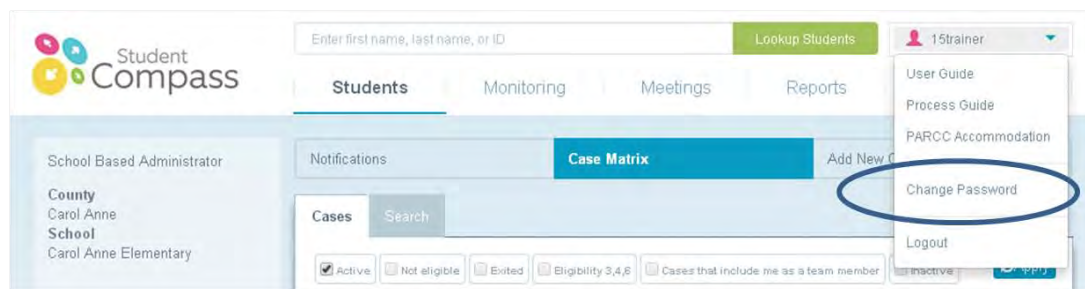
Password Recovery

Password Changes

IEP Process Questions

Password Change

Passwords can be changed by the user with a login to the system to one of their choosing. The **Change Password option** is available from the drop-down menu under the users name in the upper right-hand corner. A **Change Password page** will be displayed to enter the new password.





Maryland State Department of Education

Maryland Online IEP

MSDE Division of Special Education and Early Intervention Services



MD Online IEP User's Guide

Orientation

Getting Started

Locating a Student's Case

Student Compass: Caseload Level

Student Compass: Student Level

Meetings

IEP Development

Identifying Information

Eligibility

Participation

Present Levels

Special Considerations

Goals

Services

LRE and Placement Summary

Additional IEP Functions

Transferring and Exiting Students

Forms and Logs

Reports

Additional Case Level Functions

County Level/Data Manager Functions

Managing User Accounts

Editing Demographic Information

Technical Support & Troubleshooting

Password Recovery

Password Changes

IEP Process Questions

IEP Process Questions

Call your designated supervisor if you have questions about the IEP process or refer to the **IEP Process Guide**. Process questions should be directed to MSDE.