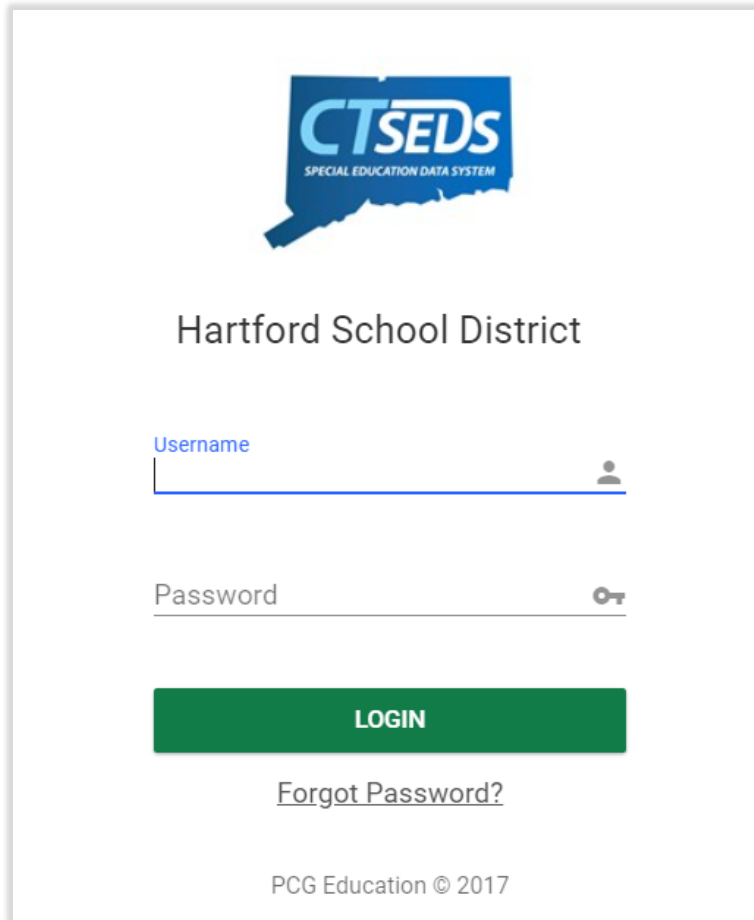


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1. Logging In

1.1. Logging in to CT-SEDS for the First Time



The screenshot shows the login interface for the Hartford School District. At the top, there is a logo for CTSEDS (Special Education Data System) featuring a blue outline of the state of Connecticut. Below the logo, the text "Hartford School District" is centered. The login form consists of two input fields: "Username" with a person icon on the right, and "Password" with a key icon on the right. Below these fields is a prominent green "LOGIN" button. Underneath the button is a link for "Forgot Password?". At the bottom of the form, the text "PCG Education © 2017" is displayed.

Figure 1: Login Screen

The **Login Page** asks for the User's Username and Password. The username will be the user's email address. Passwords must be a minimum of 8 characters that contain at least: 1 uppercase letter, 1 lowercase letter, 1 special character and 1 number.

Upon first login, the user will be prompted to accept the **Electronic End-User Agreement**. If the user does not accept this agreement, they will not be allowed further into the CT-SEDS system.

**Public Consulting Group, Inc.
Electronic End-User Agreement
PCG Licensed Products**

NOTICE TO END-USER: BY SELECTING "I AGREE" BELOW, YOU AGREE TO ALL OF THE REPRESENTATIONS AND TERMS SET FORTH BELOW.

Empty School System ("the School System") has purchased a license to use a Public Consulting Group, Inc. ("PCG") electronic software product subject to the provisions of a licensing agreement between the School System and PCG ("the PCG Licensed Product"). (PCG Licensed Products include, but are not limited to: BehaviorPlus™, ClassroomTrac™, EasyIEP™, and EasyTrac™.)

You, the End-User of the PCG Licensed Product, represent and agree as follows:

1. You are an employee of the School System and you are authorized by the School System to use the PCG Licensed Product.
2. You will use the PCG Licensed Product only for authorized School System purposes, at locations authorized by School System.
3. You will not share your password with any other person, and will change your password as may be required by PCG or School System.
4. You will not access or attempt to access the PCG Licensed Product software that is not intended for user access, and will not copy, transfer, reverse engineer, disassemble, decompile, distribute, modify, translate, or create derivative works of the PCG Licensed Product software or any part of the PCG Licensed Product software.
5. You acknowledge that the PCG Licensed Product is the property of PCG and is protected by copyright, trade secret and contract laws.

Note: Clicking on "Don't Agree" will log you out

Figure 2: User Agreement

The first time the user logs in, the user will also be prompted to update their password. At a minimum, passwords must be a minimum of 8 characters that contain at least: 1 uppercase letter, 1 lowercase letter, 1 special character and 1 number.

Figure 3: Change Password

The first time the user logs in, they will also be prompted to create a ‘**Forgot Password Question**’(s) so the user will be able to reset the password if needed in the future.

Figure 4: Forgotten Password Questions

1.2. My Account

From any page, clicking **My Account** will reveal a sub menu that will allow the user to navigate to several tools and areas specific to their account.

Figure 5: My Account Submenu

Within this submenu, the user can edit their Calendar, view all documents that they have created, adjust their information including updating their password, view messages, and view reports they have created.

1.1.1. My Calendar

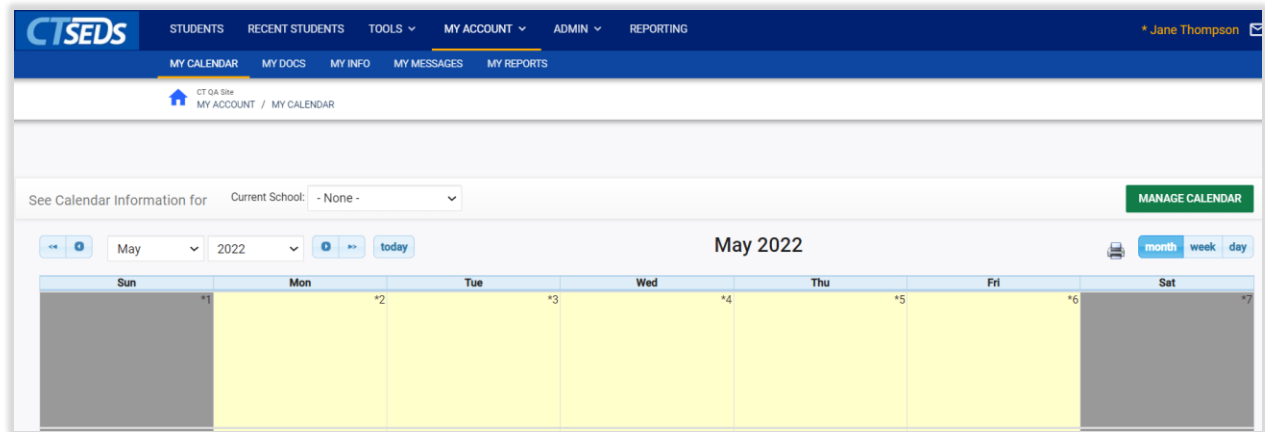


Figure 6: My Calendar

The submenu presented under the **My Account** tab begins with **My Calendar**. Users can add appointments to their CT-SEDS calendar by double clicking on the date of appointment, which will bring open a page to **ADD A NEW CALENDAR ENTRY**.

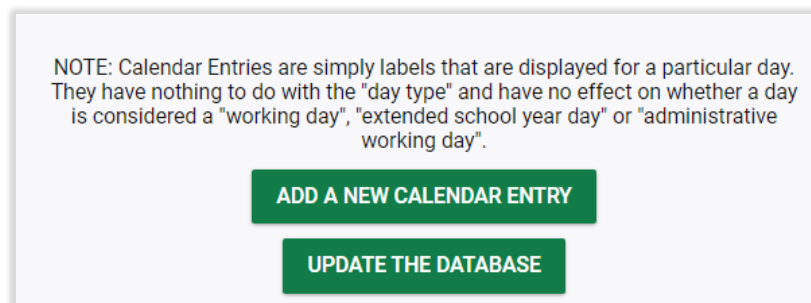


Figure 7: Add a New Calendar Entry

Appointments can be color coded by topic and additional CT-SEDS users can be included by clicking the **ADD USERS** and selecting the user within the system. When users are added, they will receive a notification in the CT-SEDS Message Center with the new appointment invitation.

Figure 8: Add a New Entry

1.1.2. My Docs

The My Documents page displays all student documents for students on a user's caseload. The user can filter by date, grade, school, etc., click **SEARCH MY DOCUMENTS** to see all documents.

Figure 9: My Docs

To open a document, the user needs to click on the Document Title. To batch documents into a single PDF, select the Batch checkbox next to the desired documents and click **VIEW DOCUMENT BATCH** at the bottom of the page. This will allow the user to open multiple documents in one PDF.

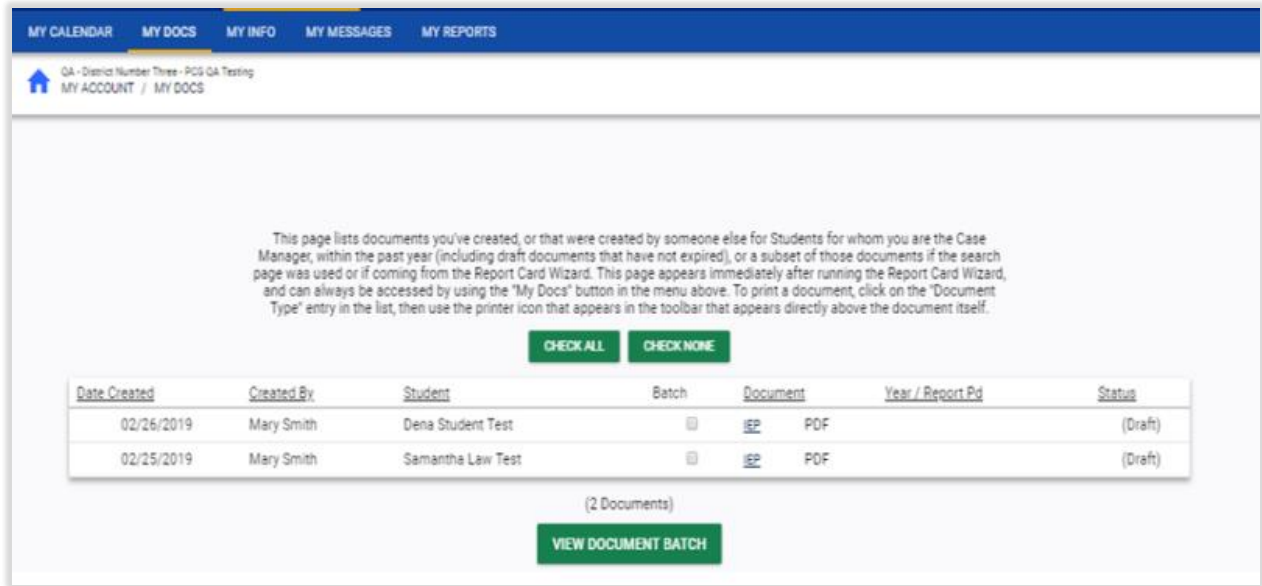


Figure 10: My Docs

1.1.3. My Info

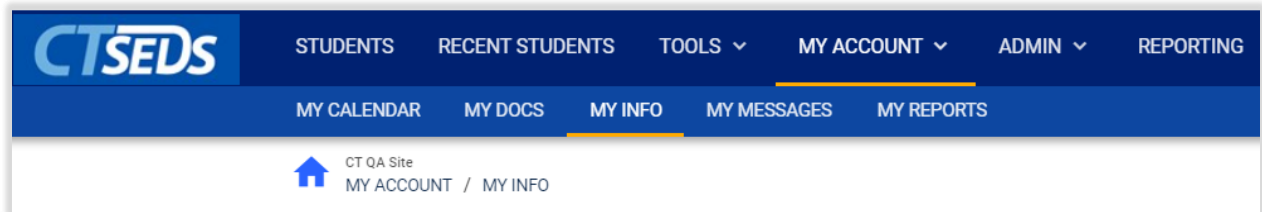


Figure 11: My Info

A user can change their password using the My Info submenu. Passwords must be a minimum of 8 characters that contain at least 1 uppercase letter, 1 lowercase letter, 1 special character, and 1 number.

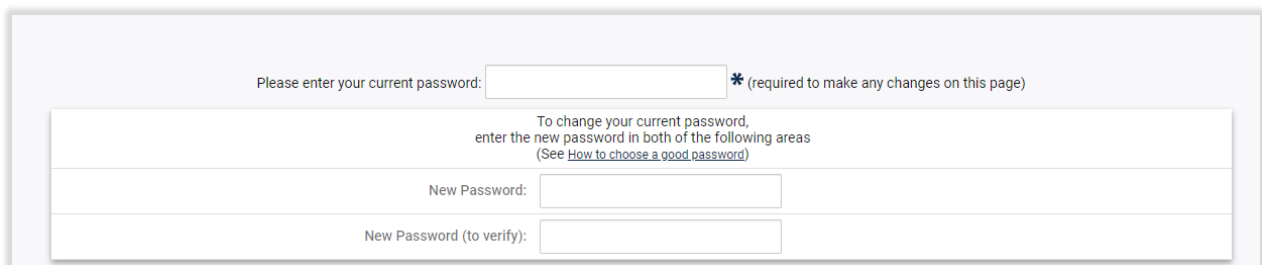


Figure 12: Change Password

1.1.3.1. Updating contact information.

On the My Info page, the user can also update basic contact information and update forgotten password questions. Please note, information entered here could be available elsewhere in the system. For

example, if the user is a student's case manager, the phone numbers, title, and address entered here may be added to documents. Please do not use personal information.

The screenshot shows a user profile form with the following fields and values:

- Name: First (Jane), Middle (), Last (Thompson), Suffix () *
- User Name: jthompson
- User Code: JThompson1
- Title: Special Education Teacher
- Address: ()
- City, State, ZipCode: () () ()
- Home Phone: ()
- Work Phone: ()
- E-Mail Address: jane.thompson@test.com *

Buttons at the bottom:

- SET MY FORGOTTEN PASSWORD QUESTION
- UPDATE THE DATABASE

Figure 13: My Info

1.1.3.2. Forgotten Password

If the user has forgotten their password, click the **Forgot Password** link on the district's main login in page. The user will be guided through a 5 step process to reset the password. In order to use this function, the user must enter their name and e-mail address as they are in the CT-SEDS system.

The steps are as follows:

- Step 1:** Enter name and e-mail address, and verify image
- Step 2:** Answer verification questions
- Step 3:** Generate temporary log-in
- Step 4:** Obtain authorization code
- Step 5:** Enter authorization code

Once the user gains access to the system, the user will be prompted to enter a new password. Passwords must be a minimum of 8 characters that contain at least 1 uppercase letter, 1 lowercase letter, 1 special character, and 1 number.

1.1.4. My Messages

The My Messages tab is another means for users to access the message strings that have occurred within the CT-SEDS system. It also allows users to search for historic message strings.

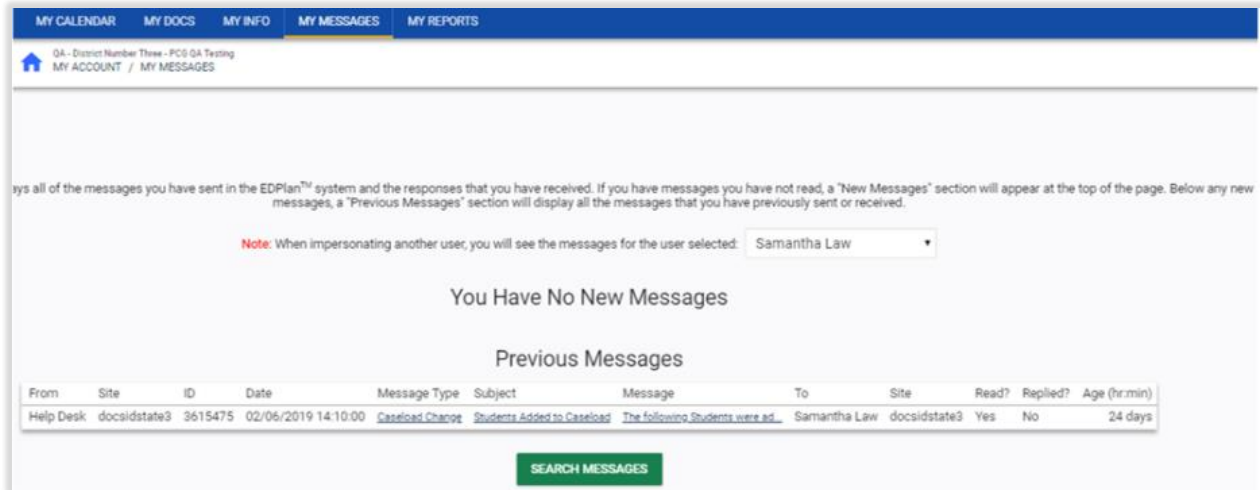


Figure 14: My Messages

1.1.5. My Reports

The My Reports tab allows users to see and access the reports they have previously generated.

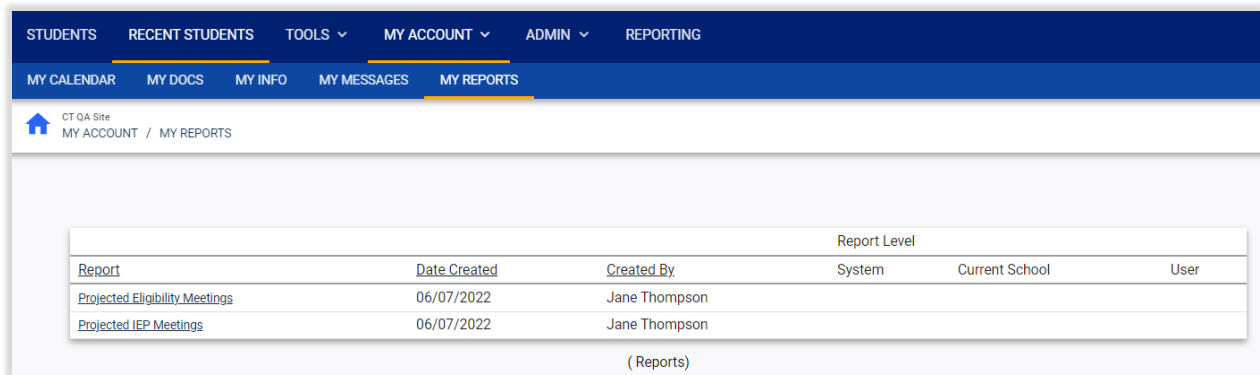



Figure 15: My Reports

1.2. Logging Off

Users should log off CT-SEDS when work is finished or when stepping away from their computer to ensure that unauthorized persons do not view information to which they do not have access. To log off, just look for the log off symbol in the upper right-hand corner of the screen and click  it.

Once the user is completely logged off, it is also a good idea to close the browser window.

2. Home Page

The **Top-Level Navigation Bar** is visible on all pages within CT-SEDS. Use the tabs here to navigate the system and perform various functions. To return to the Main Menu, click the **CT-SEDS** logo in the top left. To log out, click the logout arrow in the top right.

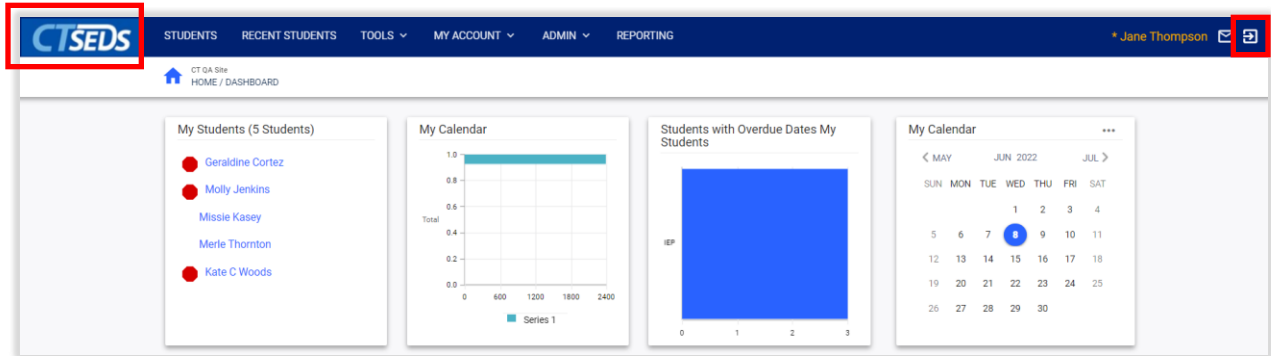


Figure 16: Home Page

Dashboard Widgets display relevant information based on user type permissions. Ex. Non-administrative level users would have a compliance widget based on their individual caseload of students (My Students Widget). District Administrators see district-wide special education compliance and can drill down to individual school and user caseload compliance (My Serving Schools Widget). My Calendar, Announcements, and Helpful Documents Widgets are available for all user types.

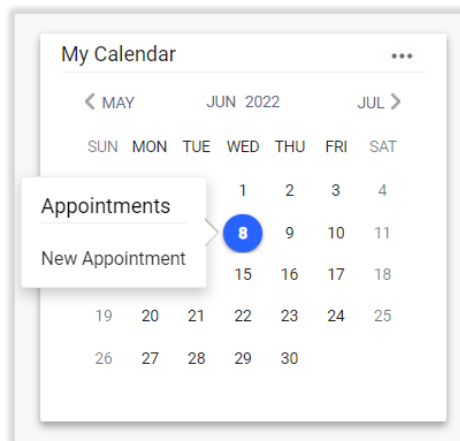


Figure 17: My Calendar Widget

Clicking a date on the My Calendar Widget displays any scheduled appointments along with a 'New Appointment' button. Clicking **New Appointment** allows the user to schedule a meeting, flag it in various categories/colors for organizational purposes and add other CT-SEDS users.

Add a New Entry:

Entry Name:

Category:

Color:

Additional Users:

All Day Event?

Start/End Time: Start: End:

6a 8p Duration:

Location:

Description:

NOTE: Calendar Entries are simply labels that are displayed for a particular day. They have nothing to do with the "day type" and have no effect on whether a day is considered a "working day", "extended school year day" or "administrative working day".

Figure 18: Add a New Calendar Entry

The Documents Widget at the bottom of the Main Menu contains documents such as user manuals and other helpful documents organized under relevant tabs.

Documents ...

General Files CT-SEDS District

File Name

[Connecticut_EDPlan_Manual_Administrative_Tasks_2020.02.20.docx](#)

Figure 19: Documents

2.1. Wizards

Wizards are tools that help a user complete tasks in the CT-SEDS system. The wizards that a user has available to them is specific to the user type they have. For instance, Related Service providers will likely see wizards that will allow them to document services that have been provided to students. One wizard that is common to most all users is the Caseload Setup Wizard.

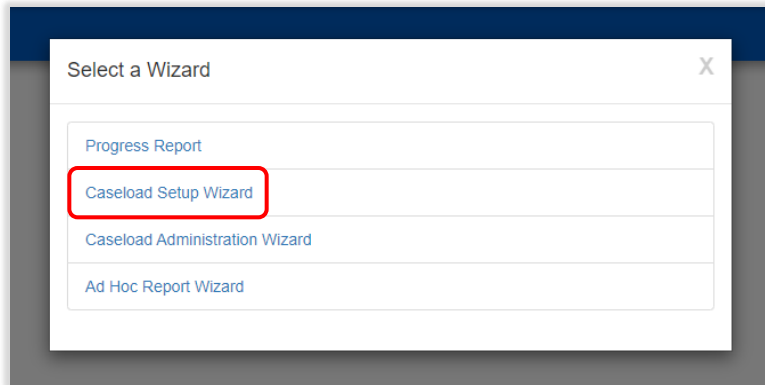


Figure 20: Caseload Setup Wizard

Accessing the Caseload Setup Wizard

1. Click on the “Tools” menu at the top of the page in the dark blue navigation bar.
2. Click on “Wizards” in the light blue navigation bar.
3. Click on the “Caseload Setup Wizard” link

Adding a Student to a Caseload

1. Click on the “Add More Students to Caseload” button
2. Search for students by providing criteria such as last name or Student ID. Click ‘View Students’
3. Select the student(s) to add to the caseload by selecting the appropriate check box based on whether the user is a team member or the student’s case manager
4. Scroll to the bottom and click ‘Update the Database’ to save the selection(s)

Removing a Student from a Caseload

1. To remove a student from the caseload, uncheck the box next to the student’s name and click ‘Update the Database’ button

Other common Wizards are addressed in different manuals. The Caseload Administration Wizard, which allows certain users to set up caseloads for staff members is addressed in the Administrative Manual. The Progress Report wizard is addressed in the IEP and Progress Reporting Manual. Service Logging wizards for providers are addressed in the Service Logging Manual.

3. Finding Students

Users find students by accessing the Students tab on the dark blue main menu navigation bar.

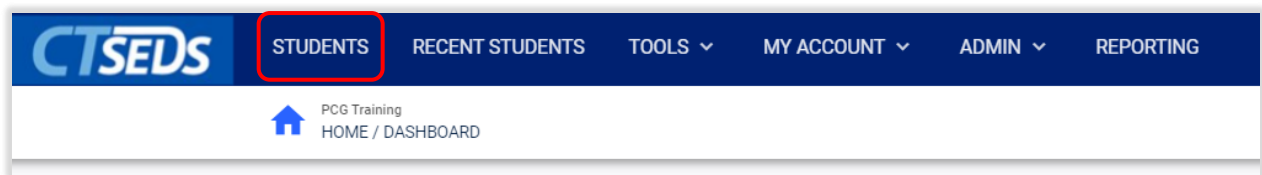


Figure 21: Main Menu Navigation bar

3.1. Student Search Page

Clicking on the 'Students' tab will take the user to the Student Search Page.

Figure 22: Student Criteria

The user can search by Compliance status to show lists of students with upcoming or overdue action items.

Compliance Status						
	Compliant	Warning	Overdue	Proposed	Rejected	Expired
Referral	<input type="checkbox"/> ✓	<input type="checkbox"/> ⚠	<input type="checkbox"/> Ⓜ	<input type="checkbox"/>	<input type="checkbox"/>	
Parent Consent	<input type="checkbox"/> ✓	<input type="checkbox"/> ⚠	<input type="checkbox"/> Ⓜ	<input type="checkbox"/> ✉	<input type="checkbox"/>	
Eligibility Determination	<input type="checkbox"/> ✓	<input type="checkbox"/> ⚠	<input type="checkbox"/> Ⓜ	<input type="checkbox"/>	<input type="checkbox"/>	
IEP	<input type="checkbox"/> ✓	<input type="checkbox"/> ⚠	<input type="checkbox"/> Ⓜ	<input type="checkbox"/>	<input type="checkbox"/>	
ISP	<input type="checkbox"/> ✓	<input type="checkbox"/> ⚠	<input type="checkbox"/> Ⓜ	<input type="checkbox"/>	<input type="checkbox"/>	
Section 504 Parent Consent	<input type="checkbox"/> 5	<input type="checkbox"/> ⚠	<input type="checkbox"/> Ⓜ	<input type="checkbox"/>	<input type="checkbox"/>	
Section 504 Eligibility	<input type="checkbox"/> 5	<input type="checkbox"/> ⚠	<input type="checkbox"/> Ⓜ	<input type="checkbox"/>	<input type="checkbox"/>	
Section 504 Plan	<input type="checkbox"/> 5	<input type="checkbox"/> ⚠	<input type="checkbox"/> Ⓜ	<input type="checkbox"/>	<input type="checkbox"/>	

Figure 23: Compliance Status

The user can search by Student OSEP District.

Student OSEP District

<input type="checkbox"/> Andover School District	<input type="checkbox"/> Ansonia School District	<input type="checkbox"/> Ashford School District
<input type="checkbox"/> Avon School District	<input type="checkbox"/> Barkhamsted School District	<input type="checkbox"/> Berlin School District
<input type="checkbox"/> Bethany School District	<input type="checkbox"/> Bethel School District	<input type="checkbox"/> Bloomfield School District
<input type="checkbox"/> Bolton School District	<input type="checkbox"/> Bozrah School District	<input type="checkbox"/> Branford School District
<input type="checkbox"/> Bridgeport School District	<input type="checkbox"/> Bristol School District	<input type="checkbox"/> Brookfield School District
<input type="checkbox"/> Brooklyn School District	<input type="checkbox"/> Canaan School District	<input type="checkbox"/> Canterbury School District
<input type="checkbox"/> Canton School District	<input type="checkbox"/> Chaplin School District	<input type="checkbox"/> Cheshire School District
<input type="checkbox"/> Chester School District	<input type="checkbox"/> Clinton School District	<input type="checkbox"/> Colchester School District
<input type="checkbox"/> Colebrook School District	<input type="checkbox"/> Columbia School District	<input type="checkbox"/> Connecticut Technical Education and Career System
<input type="checkbox"/> Cornwall School District	<input type="checkbox"/> Coventry School District	<input type="checkbox"/> Cromwell School District

Figure 24: Search by student OSEP District

After making selections and clicking the **View Students** button (at the bottom of the page), the user's results will appear.

Select a Student																	PRINT RESULTS	EXPORT RESULTS	SEARCH AGAIN
CS	Student Code	SASID	Name	Date of Birth	Age	Gender	School	Grade	Eligibility Date	Disability	IEP Begin	IEP End	Proj Elig	Proj IEP	Case Manager	504 Disability Begin	504 End	Section 504 Case Manager	
✓	850230646	5739686751	Claudia Terry	05/02/2003	19 Years	Male	PHS	4	09/22/2021	ID			09/22/2024		Hannah Monitor				
Ⓜ	CT849230603	5738693251	Krystal B Burton	05/08/2003	19 Years	Male	PHS	10	12/17/2021	ED			12/17/2024	02/17/2022	Adam Administrator				
Ⓜ	0000014	TX	Blake Alvarez	05/20/2003	19 Years	Male	PHS	12	02/21/2022	ASD			02/21/2025	05/25/2022	Lauren Test POG			Ryan Testing	
✓	850230625	5739686730	Stanley Howard	10/15/2003	18 Years	Female	PHS	12											Emily Test
✓	850230661	5739686766	Kristi Townsend	10/15/2003	18 Years	Female	PHS	12								Autism			Samantha Testani
Ⓜ	850230601	5739686706	Kelly Gardner	10/15/2003	18 Years	Female	PHS	10							Hannah Monitor	Autism	03/22/2022	03/22/2023	Emily Test

Figure 25: Student Search Results

Depending on the user type, some users will just see their caseload, or the search results from the search criteria that was entered. Select the student the user would like to view by clicking on their name.

The user can also sort the list by any of the column headers by clicking on the column header and can generate a report containing all the listed information directly from this page.

Clicking PRINT RESULTS generates a report in PDF format. Clicking EXPORT RESULTS generates a report in Excel format.

3.2. Advanced Search

From the Basic Student Search page, the user can switch to Advanced Search using the link in the upper right corner.

Figure 26: Advanced Search

This will display additional search criteria.

4. Student Menu

From either a student search result, or from the Caseload Widget on the home page, clicking the student’s name will bring the user into the student’s record and a new submenu. Users will see the student’s first initial and last name in the dark blue menu, and the lower, light blue menu are areas within the student’s record that can be navigated.

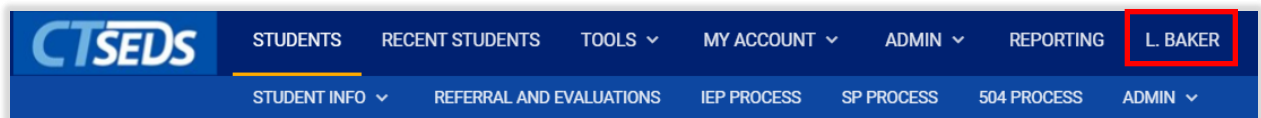


Figure 27: Student Menu

Above is a portion of the student menu. Depending on the student and the user permissions, different modules and menus may appear here. The first four areas are commonly available for most all users.

4.1. Personal Information Page

The Personal Information page contains basic demographic information about the student and their enrollment. Most of the data on this page will not be editable by most users. If something is incorrect, it will need to be changed in the source system for the information or changed by an administrator.

Student Information Events

▼ Personal Information UPLOAD PICTURE

First Name: Lorenzo Middle Name: B Last Name: Baker Suffix: _____

Student Code: CT849230683 SASID: 5738693331 Date of Birth: 05/02/2005 (Age 17 Years)

Place of Birth: _____ Gender: Male ▼ Primary Language: English ▼

Language of Instruction: ▼ Document Language: ▼ Is the student an English Learner (EL)?

Exclude From Widgets

Student is Responsible
 Yes (Student has Parent's Rights)

Figure 28: Personal Information Page

4.2. Team Page

The Team page manages staff and parents who are members of the student’s team.

IEP Team SELECT IEP TEAM

Special Education Section 504

Case Manager: Jane Thompson ▼

Name	Relationship
John Nowel	Teacher
Jack Moor, Jr	
David Hotchman	Case Manager
Debbie Jordan	District Administrator
Jill Pittman	Mother
Brice Rangelx	Grandparent

SAVE

Figure 29: Team Page

The default team is the Planning and Placement Team (i.e., IEP team), but some students may have other teams that can be toggled through.

4.2.1. Adding Team Members

To add additional team members, select the **Select IEP Team** link in the upper right corner of the Team page. This will open a window that will list staff in the same school as the student. Use the check boxes to add or remove team members. Click **Save** when finished.

Select IEP Team ✕

Note: To include someone on this Student's IEP Team who is not a user in this system, you will need to first add that person on the "Parents" page, which allows adding other persons besides parents, e.g. a Student's doctor, other family members, etc.

Case Manager
Jane Thompson

Parents, etc. who will receive IEP Information

Select	Parent Name(s)	Relationship
<input checked="" type="checkbox"/>	Jill Pittman	Mother
<input checked="" type="checkbox"/>	Brice Rangel	Grandparent

Other Users at Plainfield High School who can access IEP Information

Search: _____

Select	User Name	Title	View Only
<input type="checkbox"/>	Admin, Marcin		<input type="checkbox"/>
<input type="checkbox"/>	Admin, Test, CA, CSEP		<input type="checkbox"/>

CLOSE **SAVE**

Figure 30: Select IEP Team

4.2.2. Adding Parents

To add additional team members from the student's parents and guardians, click the **Select IEP Team** link in the upper right corner of the Team page. This will open a window that will list staff in the same school as the student. Use the check boxes to add or remove team members.

IEP Team [SELECT IEP TEAM](#)

[Special Education](#) [Section 504](#)

Case Manager
Olevia Cox ▼

Figure 31: Select IEP Team

Names that appear on this page come from data entered and maintained on the Parents page. For more information about parents and guardians, go to the next section of this manual.

Select IEP Team ✕

Note: To include someone on this Student's IEP Team who is not a user in this system, you will need to first add that person on the "Parents" page, which allows adding other persons besides parents, e.g. a Student's doctor, other family members, etc.

Case Manager
Olevia Cox

Parents, etc. who will receive IEP Information

Select	Parent Name(s)	Relationship
<input checked="" type="checkbox"/>	Kirstie Alley	Mother

Other Users at Connecticut Public School who can access IEP Information

Search: _____

Select	User Name	Title	View Only
<input type="checkbox"/>	Antonio, Roosevelt	Provider	<input type="checkbox"/>
<input type="checkbox"/>	Arnold, Mildred	Provider	<input type="checkbox"/>
<input type="checkbox"/>	Austin, Chlo	Provider	<input type="checkbox"/>

CLOSE **SAVE**

Figure 32: Parent/Guardian

4.3. Parents Page

The parents page manages parents and guardians for each student.

CTSEDS
STUDENTS RECENT STUDENTS TOOLS MY ACCOUNT ADMIN REPORTING L. BAKER

STUDENT INFO REFERRAL AND EVALUATIONS IEP PROCESS SP PROCESS 504 PROCESS ADMIN

PERSONAL INFO

TEAM

PARENTS

CONTACT LOG

Parent Info / PARENTS

Guardian VIEW PARENT ACTIONS ADD NEW PARENT/GUARDIAN ASSOCIATE WITH EXISTING PARENT/GUARDIAN

Position	Name	Relationship	Home Phone	Work Phone	Cell Phone	Details	Delete
1	Jill Pittman	Mother	(203) 978-6566				
2	Brice Rangel	Grandparent	(340) 967-0256	(549) 547-2702	(398) 429-3794		

SAVE

Figure 33: Parents Page

From this page, clicking the pencil icon on any parent or guardian’s row will show the person’s detailed contact information. Like student demographic information, the data on this page may or may not be editable by some users. If information is incorrect, changes must be made in the source system for this data.

Figure 34: Edit Parent/Guardian

Important: For the parent or guardian to appear on certain documents in IEP or 504 plan, the checkbox for Can receive Parent Portal notifications, indicating Guardian Responsibility, must be checked. If this is not checked, the user will receive an error that a parent has not been added.

Please note, if the LEA has signed up for Data Exchange with their SIS and included this field, then the Can receive Parent Portal notifications field can be updated via import. If this is not occurring, the field will need to be updated manually.

4.3.1. Parent Portal

Documents can be sent to an online Parent Portal for parents and guardians to access. When the Can receive Parent Portal notifications field is checked, the parent or guardian can receive email notifications to access the Parent Portal. To send the parent or guardian a link to access the portal, click on the green **SEND ADHOC ACCESS EMAIL** button. Please note, links to access the Parent Portal are automatically sent when parent consent documents are sent to the Parent Portal, but Ad Hoc Parent Portal access can be sent using this button at any time.

Figure 35: Send Adhoc Access Email

If a user needed to turn off a parent or guardian’s access to the Parent Portal, check the Disable Portal Access box and click **SAVE**.

▼ EDPlan Connect Access

Disable Portal Access

SEND ADHOC ACCESS EMAIL

▼ Comments

Comments

BACK

SAVE

Figure 36: Disable Portal Access

4.4. Contact Log

The purpose of the **Contact Log** page is to provide a place for the district to document contact attempts that were made between team members and the parents/guardians of the student.

STUDENT INFO ▼

PERSONAL INFO

TEAM

PARENTS

CONTACT LOG

Figure 37: Contact Log

The contact log can be printed or exported for use outside of the CT-SEDS system. To add a new contact, click the **Add a Contact** link in the upper right corner of the list of recorded contacts. Contacts will be organized by school year. When users generate documents that have an associated contact they can associate the contact entries with the document.

Contacts
PRINT CONTACTS
EXPORT CONTACTS
ADD A CONTACT

Active Contacts Inactive Contacts

Del	Contact With	Contacting Person	Person Contacted	Contact Method	Contact Date	Contact Result	Document	Details
<input type="checkbox"/>	Parent	Jane Thompson	Jill Pittman	Email	06/01/2022	Parent/guardian will attend meeting		✎
<input type="checkbox"/>	Parent	Jane Thompson	Jill Pittman	Phone	06/07/2022	Left a message		✎

SAVE

Figure 38: Contacts

On the Contact Details window, users can select to document a contact made with a Parent or Other type of contact. Select the Contact Method, the Person Contacted, Date and other information to document the communication. When finished, click **Save** and the contact log will be complete and listed on the main contact log page.

Figure 39: Contact Details

5. Documents

5.1. Create/View Documents

The majority of student documents are created as users work through system processes. Certain documents can be created outside the processes in the system. To create a Document outside of a system process, navigate to the Create/View documents page.

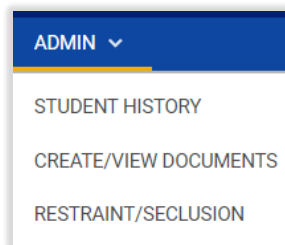


Figure 40: Create/View Documents

Select the radio button next to the document and click Create Draft or Create Final. Creating a draft first is best practice as drafts are only temporarily saved in CT-SEDS and Finals are saved and have to be requested to be deleted if an error is found.

Each document has its own document creation page to collect any relevant data needed to populate the document. Complete the required information and generate the document.

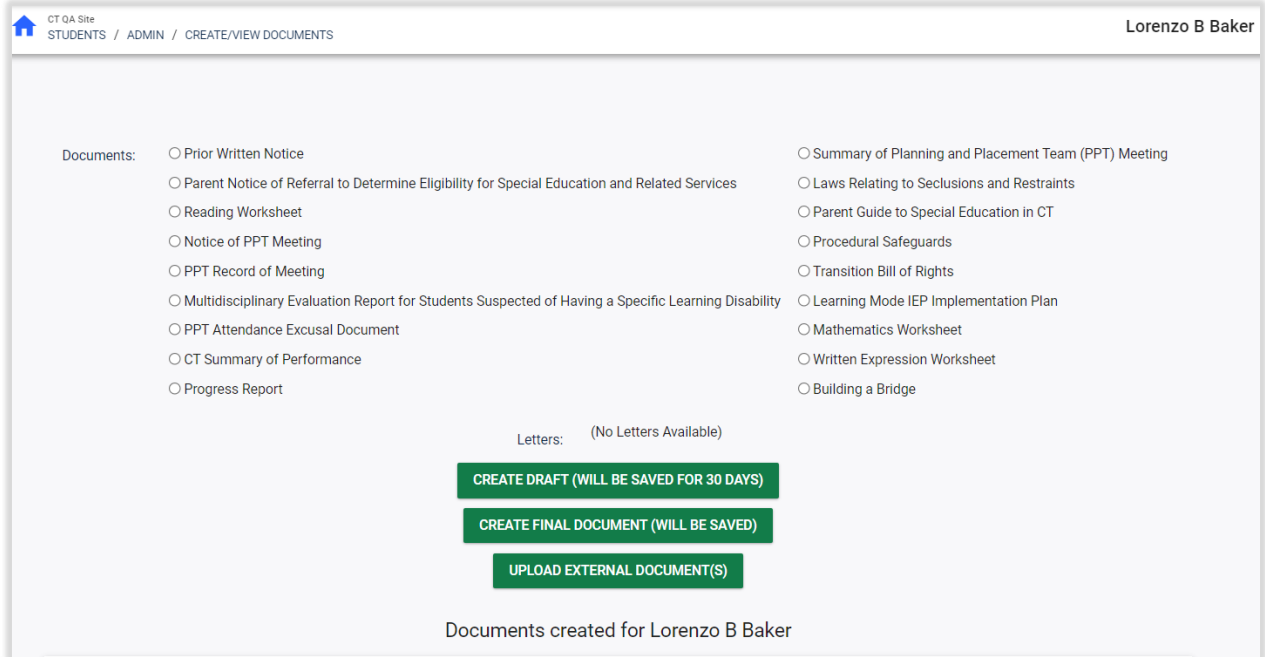


Figure 41: Create/View Documents

Once created, documents appear in the table at the bottom of the page. To open a document and save it to the user’s computer or print, click the document name.

To batch multiple documents into one PDF, select the documents in the batch column and click View Document Batch.

Documents created for Lorenzo B Baker								
Doc ID	Date Generated	Generated By	Document		Batch	Status	Req Sig?	Signatures
3595	10/05/2021	Ryan Lemieux	Prior Written Notice	PDF	<input type="checkbox"/>	<input type="checkbox"/>		
3594	10/05/2021	Ryan Lemieux	PPT Record of Meeting	PDF	<input type="checkbox"/>	<input type="checkbox"/>		
3593	10/05/2021	Ryan Lemieux	PPT Record of Meeting	PDF	<input type="checkbox"/>	<input type="checkbox"/>		
3592	10/05/2021	Ryan Lemieux	Notice of PPT Meeting	PDF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3591	10/05/2021	Ryan Lemieux	Referral to Determine Eligibility for Special Education and Related Services	PDF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Figure 42: Documents Table

5.2. Upload documents

To attach a document created **outside** CT-SEDS, click Upload External Documents.

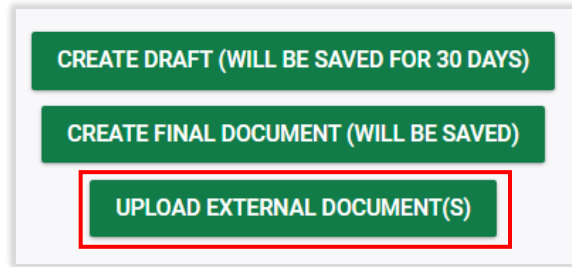


Figure 43: Upload External Documents

Enter a Name for the document(s) to appear in the documents table. If left blank, the filename will display.

Permitted file extensions are: **PDF, DOC, XLS, TXT, RTF, PPT, TIF, JPG, PNG, XLSX, PPTX, and DOCX**
 No file may be greater than **1000.00 MB** in size.

File	Name (if not provided the file name will be used)
Choose File No file chosen	<input type="text"/>
Choose File No file chosen	<input type="text"/>
Choose File No file chosen	<input type="text"/>
Choose File No file chosen	<input type="text"/>
Choose File No file chosen	<input type="text"/>

UPLOAD FILE(S)

Figure 44: Upload External Documents

5.3. Upload Attachments

To attach an external document to a document created **inside** CT-SEDS (ex. Attaching a signature page to an IEP created in CT-SEDS), click the Upload External Attachments button.

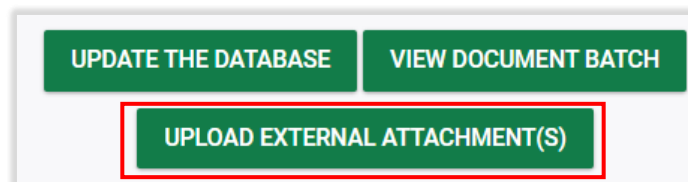


Figure 45: Upload External Attachments

Choose the CT-SEDS document to attach the external document to by selecting the radio button at left. Browse for the file on the user’s computer and provide a name to display in the Documents table.

Upload Attachments for Lorenzo B Baker

Permitted file extensions are: **PDF, DOC, XLS, TXT, RTF, PPT, TIF, JPG, PNG, XLSX, PPTX, and DOCX**
 No file may be greater than **1000.00 MB** in size.

Doc ID	Date Generated	Document	
<input type="radio"/>	3595	10/05/2021	Prior Written Notice
<input type="radio"/>	3594	10/05/2021	PPT Record of Meeting
<input type="radio"/>	3593	10/05/2021	PPT Record of Meeting
<input type="radio"/>	3592	10/05/2021	Notice of PPT Meeting
<input type="radio"/>	3591	10/05/2021	Referral to Determine Eligibility for Special Education and Related Services
<input type="radio"/>	1198	08/13/2021	Mutual Agreement to Extend Evaluation Timeline for Determining..
<input type="radio"/>	1197	08/13/2021	Mutual Agreement to Extend Evaluation Timeline for Determining..
<input type="radio"/>	1040	08/10/2021	Notice of PPT Meeting
<input type="radio"/>	917	08/04/2021	Consent to Conduct an Initial Evaluation/ Reevaluation

File Name (if not provided the file name will be used)

No file chosen

Figure 46: Upload Attachments

6. Reports

6.1. Create and View Reports

Different user types will have different reporting access. To see reporting options, navigate to the Reporting tab.

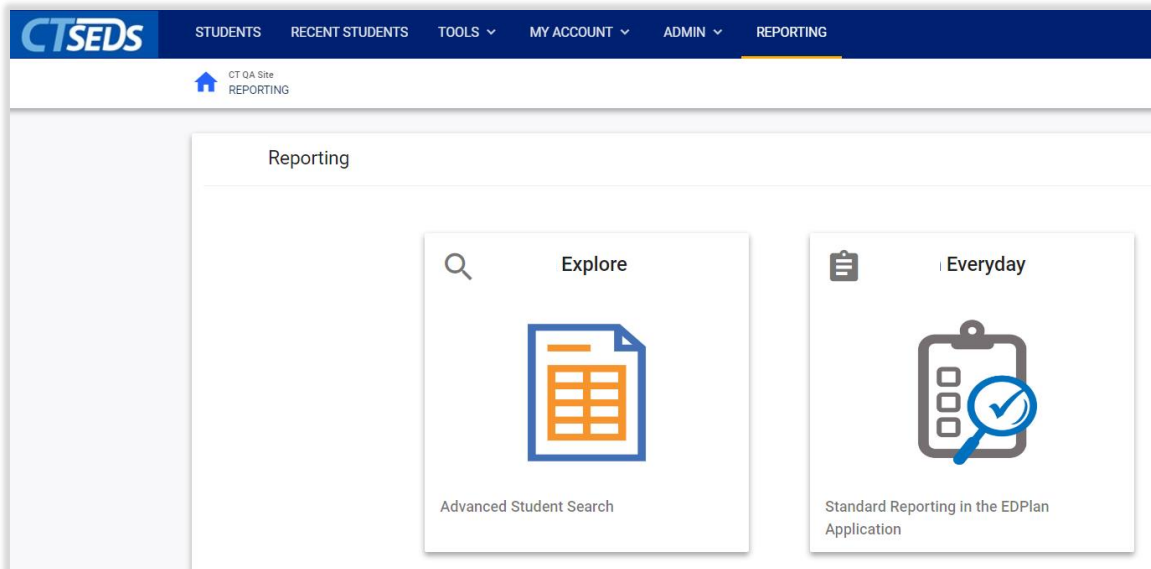


Figure 47: Reporting

Click on EDPlan Explore to access the Advanced Student Search will allow users to access more reporting options for students. Select the desired criteria and click **VIEW STUDENTS**.

▼ Explore [BACK TO REPORTING DASHBOARD](#)

▼ Historical Records

ℹ Use the checkbox below to search for Students using the information from the Current IEP rather than the Workspace
NOTE: School and Grade Information will be based upon current Student information when searching.

Search for Historical Records

▼ Student Information

Student Last Name Exact Match Student First Name Exact Match

Student ID Exact Match State ID Exact Match

Home School _____ Next School _____ ▼

Only Students with no Case Manager currently assigned. Only include Students where I am Case Manager
 Only include Students where I am a Team Member Only include Students with at least one service marked as ESY

Figure 48: Advanced Student Search

▼ Sorting

Student's Last Name Student's Middle Name Student's First Name
 Current School Grade Case Manager

Open Results in a New Window

[VIEW STUDENTS](#)

Figure 49: Advanced Student Search

Click on EDPlan Everyday to access standard reports. There are two tabs of reports: Admin and Special Education.

▼ Create Report [BACK TO REPORTING DASHBOARD](#)

[Admin](#) [Special Education](#)

Caseload Report
A report of user caseloads based on parameters entered when the report is gene...

Exited Students
A report of students that have Exited EDPlan and are currently in the Inactive...

Parent Contact Report
A report of Student Contacts entered in the system based on the parameters ent...

Figure 50: Admin and Special Education Reports

To run a report, click on the report, select appropriate criteria, and click **GENERATE REPORT** at the bottom of the screen. To return to select a different report click on **BACK TO REPORT SELECTION**.

Projected Eligibility Meetings [BACK TO REPORT SELECTION](#)

Select Students to Include:

School:

Grade: (If none are checked, you get all grades)

Pre-Kindergarten 1st Grade 5th Grade 9th Grade
 P3 2nd Grade 6th Grade 10th Grade
 Kindergarten Half Day 3rd Grade 7th Grade 11th Grade
 Kindergarten Full Day 4th Grade 8th Grade 12th Grade
 Kindergarten Extended Programs

Disability: (If none are checked, you get all disabilities)

Autism Learning Disability SLD/Dyslexia

Figure 51: Selecting Criteria to Generate a Report

Select Evaluation Dates to Include:
(No items available)

Report Output Settings

Run at Night
(If you leave this checkbox unchecked, the report will run immediately)

[GENERATE REPORT](#)

Figure 52: Generate a Report

Once the report has run, the user will receive an email saying the report is ready to review. If the user selects Run at Night, the report will be run overnight. Once the report has run, the user can access the report under Recently Run Reports on the Reporting tab.

∨ Create Report [BACK TO REPORTING DASHBOARD](#)

[Admin](#) [Special Education](#)

Caseload Report
A report of user caseloads based on parameters entered when the report is gene...

Exited Students
A report of students that have Exited EDPlan and are currently in the Inactive...

Parent Contact Report
A report of Student Contacts entered in the system based on the parameters ent...

∨ Recently Run Report(s)

Date Generated	Created By	Report Type	Expiration Date	Keep	Custom Name
06/08/2022 13:49:00	District Admin	Exited Students	06/18/2022	<input type="checkbox"/>	

Figure 53: Recently Run Report(s)

Please note, Reports can also be accessed under My Reports under the My Account tab as referenced earlier in this guide (Section 1.1.5).