PowerSchool Best Practices - Many IEPPLUS updates bring Form (e.g. IEP) changes to our Users - some major, some minor. To be sure that your District maintains a proper audit trail, PowerSchool recommends that all IEPPLUS forms be finalized upon completion. Only work-in-progress forms should remain un-finalized.

Version 4.3.290.63000
10/11/2017

Rich Text correction
An overhaul of the Rich Text editor has corrected the following issues:
- Pasting from outside sources such as MS Word or other web pages often brings in nonsense HTML.
- Entering content in one browser then opening/modifying it in another can often create broken HTML.
- Strike-through functionality, when manually entered in the text boxes, was not saving properly.

IEP Cover Page
The IEP Cover page will now display all contact communications alphabetically on the web form and report.

Version 4.3.287.63001
08/31/2017

Rich Text Fields
Updated data utility to properly handle the justification for rich text boxes.

NOTE: This change is only for 4.3 rich-text clients only

EMIS Upload
Fixed issue where the RFRL referral incorrectly reported a missing outcome during the EMIS upload.

Version 4.3.286.63008
August 18, 2017

Editing Document Attachments
Fixed issue where the user was receiving an error when trying to override an existing document attachment which was creating multiple copies of one document.

Form Creation Report
The Form Creation’s Record selection formula was changed to include all AU_Types.

Formatting/Spacing Issues
Wrote solution to convert MSWord HTML to HTML IEP accepts.

Version 4.3.286.63001
August 2, 2017
Unfinalized Form Report
Unfinalized form report no longer time out and runs correctly.

Data Integration
For returning to special education student Placement grade and location for populate correctly when student is referred from eSchoolPLUS and first time integration runs.

Version 4.3.285.63004
July 18, 2017

EMIS error messages
Fixed issue where specific referral error was being marked as an error but not putting error message in the error table for user to know what to fix.

Mass Lock/Finalize
The following upgrades have been added to the mass lock/finalize area:
- A new ‘Select All Students’ option has been added to lock all unlocked forms of the selected type with the selected report.
- The process was modified to include all ‘important date’ finalization.
- The process has been changed to lock documents one at a time at 3 second intervals, with options to allow users to continue or stop the process.

Version 4.3.284.63000
July 11, 2017

Referral calculation
Fixed issue where calculation was adding an extra day or two to the total. Also added an application option record (Application, Referral, Add One Day) to configure the calculation to add one day or not to add one day when performing the calculation. Defaulted this value to Yes to mimic current functionality.

Rich text textboxes
Resolved the issue where information copied from Word into IEPPLUS 'rich text' text boxes was incorrectly formatted.

Overdue IEP Report
The report has been updated to include 'important date' entries that use Notification Code = IEPCompletionDate.

Validation rule 45710 failing incorrectly
Fixed validation rule to only look at meetings with a kind of 1, meaning original.

Validation rule 45630 causing query execution error
Fixed validation rule to look at most recent disability instead of returning multiple.

eSchoolPlus - 504 Plan Rule #2
Fixed data integration rule to allow all 504 alternate codes to report Yes instead of just 504 code.

eSchoolPlus - Student Status Rule #2
Fixed data integration rule to report latest alternate code based on start date descending and description ascending.

IEP Validation Rule 45019
The rule will no longer fail when IEP was amended and 'FIEP' meeting was attached to the amendment. The rule is looking at the meeting type 'FIEP' with code type 'Alternate Code' and description of 'FIEP'.

**Version 4.3.279.63004**
June 8, 2017

**IEPPLUS 4.3 Rebranding**
Removed "PLUS 360" and "a PLUS 360 Application" text from the IEPPLUS 4.3 page header banner.

**Version 4.3.277.63010**
May 25, 2017

**Rich text boxes**
Resolved an issue where html tags were present when Word document items were pasted into the form.

**IEP - Validation**
Resolved an issue where the 3rd grade reading guarantee validation was being checked when the area was not in use.

**Version 4.3.276.63001**
May 16, 2017

**SIF Stored Procedure**
Resolved an issue in SIF process where randomly active enrollment records for students were being created in IEPPLUS.

**Data Integration**
Rule: 'eSP - 504 Plan Rule #2'
The rule no longer displays the error 'Subquery returned more than 1 value'.

**Service Plan, Validation rule 45442**
Validation rule 45442 will no longer fail when there is no Important date 'Service Plan Next Review' and also will no longer fail when Important date 'Service Plan next review' and meeting date are same.

**EMIS Upload**
EMIS Upload was incorrectly uploading all of the students AIEP meeting. This has been corrected to only upload the ones that it should base on modified fields.

**OH Eligibility Report**
Finalizing the second Eligibility Report for a student will no longer overwrite the 504 Enrollment record's start date with the meeting date of the second Eligibility Report.

**Version 4.3.272.63005**
April 28, 2017
OH 504 Forms
The "Office Use Only" box has been removed from the following forms: 504 Consent for Evaluation, 504 Referral for Assistance, 504 Evaluation Report, and 504 Accommodation Plan.
In the 504 Notice of Conference form, the wording "The evaluation data and other information to be discussed are available for your review prior to conference" has been removed from the report.

Progress Reporting
In the past, users were able to enter progress notes for future objectives. Recently, the progress report was modified to only show objectives that start prior to the marking period date for each marking period. As a result, any data that had been entered for future objectives was no longer being shown. The Progress Report was modified to show that data so that it can be modified or deleted, if necessary. New progress still cannot be entered for future objectives.

Rich Textbox in IE10
Rich Textboxes will no longer display unaligned text as center aligned in IE10.

Version 4.3.268.63000
April 18, 2017

Custom Form
Corrected the issue in Firefox where the newly entered text did not appear unless save was selected.

Version 4.3.265.63006
March 30, 2017

Rich Textbox
- Updated the page to display as a full screen instead of a small window. Internet Explorer, set to auto update, caused a problem with the display in their latest version. The page has been updated to detect if the client is running Internet Explorer 11 and forced it to Edge mode instead of IE9 to eliminate this problem.
- Users can now copy and paste data into a rich text box in the latest browser version of Firefox.

Please Note: You must 'save' after pasting text from another document prior to adding additional text, text formatting or any aligning of text.

IEP Report
Updated report to print the latest Next ETR date.

IEP, Validation Rule
Updated validation rule #45705 -ETR - EMIS - Meeting Event Non Compliance to fix 'Query Execution Error'.

Statements
Update screen to load goals properly when there are progress attached.

Reporting, Timely Eligibility Report w/Calendar
Updated the report screen to save selected referral type.

Manage Staff
• Updated the Staff summary screen to properly show inactivated staff members as "Yes" for the column that reports inactive.

Manage Meeting Staff
• Added a trigger to delete the contact ID in the meetings staff table when the actual contact has been removed from the student.

Custom Forms
Updated the Custom Forms to properly show linefeeds in the print preview.

**Version 4.3.262.63000**
March 8, 2017

IEP Report
Updated the IEP report to properly print the ETR completion date.

Service Plan, Validation Rule 45442
Updated validation rule 45442 to compare the latest important date with Alternate Code = NSP with the service plan meeting to see if it's within 365 days.

Staff Management
Fixed the issue with the staff screen to allow the users to inactivate the staff member(s).

Run a Report
• **Service List Report:** Modified the service list report to increase performance when returning results and export faster.
  • **Basic List:** Corrected duplicate placement issue on the report when there are multiple disabilities or placement staff.

**Version 4.3.258.63024**
February 17, 2017

OH IEP Validation
Updated validation rule 45630 to check if an inactivation date matched the meeting date when a student is DNQ; instead of looking for a disability start date.

Progress Report
Updated report to not exclude goals ended prior to the progress reporting period date.

Add New Staff
Corrected error message received when adding a new staff member.

Student Summary, Grade and Location
Updated student summary toolbar to display the latest current grade and location when a student has multiple open ended enrollment records; it was displaying the oldest first.

**Version 4.3.258.63009**
February 1, 2017
ETR - Cover Page
Updated the ETR, to print the District of Residence/District of Service even if it is the default organization.

IEP - EMIS - Validation Rule #45433
Fixed the Query Execution Error on Rule #45433 - 'IEP - EMIS - Meeting Event Non Compliance'.

Version 4.3.258.63000
January 25, 2017

ETR Signatures
The ETR, Section 1. Individual Evaluator's Assessment, Evaluation's Signature can now print a signature image.
- A signature image associated in the Staff Table will now display the Evaluator's Signature at the bottom of the form and print on the report.
- If there is no linked signature, a user can browse to a local .jpg file on their local computer. This signature image would then be saved directly on this form as one time only.
- Images must be .jpg or .jpeg image and the maximum size is 1.92W x .330H inches.

ACTION ITEMS:
- New Functionality has been added to the form that enables a user to attach an image directly within the ETR form. A SunGard representative will need to activate this feature. Please enter a support case to turn on this enhancement.
- If you choose to link staff signatures directly to the IEPPLUS staff table, go to Maintenance, Manage Staff, select the staff name, and then Edit. On the 'Main' Tab you will see a browse button to upload the signature. Once a signature has been uploaded, it can be removed as needed.

EMIS Upload
Updated EMIS upload process to allow IE39 meeting outcome for students in grade with alternate code = "PS"

Advanced Reporting
Corrected all reports with the 'As of Date' that did not select data after the 4.3.256.63001 update.

Version 4.3.257.63001
January 20, 2017

IEP
- **Cover Page:** Modified the report to display the District Of Service to match with the web form.
- **Medicaid Parent Consent:** Updated the printing of the Parent Medicaid Consent report in the IEP to look at the system-wide option. It was printing in error when it was set to do not print Medicaid Consent.

EMIS Upload
Updated EMIS upload process to not show errors for 504 referrals. EMIS upload process does not upload 504 data.

ETR Validation Rule 45630
- Updated validation rule 45630 to not require enrollment start date if disability is DNQ and meeting reason is IETR. (A disability record is also required with the same date as the meeting date.)
- Fixed the error message 'Conversion failed when converting date and/or time from character string'. This rule will no longer display that error and validate correctly.
PLUS360 Notification
Enhanced the notification rule, Progress Past Due, by added a 'Historical Day' and 'Low Day' search option to the Gifted Progress Past Due rule. **ACTION ITEM:** If you wish to restrict the number of notifications for this rule, please go to Set System-wide Option, Set Notification Options, System Setup Tab, and update the values in this field.

Student Summary
Grade and location now display on the student summary screen when the system option, show enrollment grade and location is not enabled; the system will display the grade and location from the placement record.

Generic Report: Student Labels 3 columns by placement report
Modified the grouping on this report to use the appropriate Organization field (e.g. placement or enrollment depending on your state). It will no longer display an error message of 'The field name is not known Enrollment_Organization.OR_Name'.

**Version 4.3.256.63001**
December 23, 2016

ETR, Medicaid Consent Form
**System Options, Form, Medicaid:** New option to include the Medicaid Consent form as part of the Evaluation Report.

**ACTION ITEM:** If you wish to include this form you must turn on this system option.

<table>
<thead>
<tr>
<th>Medicaid Parent Consent and Notice of Parent Rights</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Print Medicaid Parent Consent and Notice of Parent Rights Form on IEP/Transfer IEP</td>
</tr>
<tr>
<td>☑ Print Medicaid Parent Consent and Notice of Parent Rights Form on ETR</td>
</tr>
</tbody>
</table>

Validation rule - 45630
Corrected this rule to no longer fail when 'IETR' meeting date matched with disability start date and enrollment date on the ETR form.

IEP
Cover Page: The ETR Completion date now matches on both the web form and report.

Run a Report:
- **Basic List Report:** Updated the report to increase performance on generating and exporting the pdf/excel file.
- **Form Creation List by User Report:** Updated the report to increase performance on generating and exporting the pdf/excel file.
**Progress Reporting:**

- Goals, objective or benchmarks will now display *only* when the marking period is on or after the start date. For Example: IEP goes from 4/1/15 - 3/31/16; the Progress marking periods are: 5/1/15, 6/15/15, 10/15/15, 1/15/16. The goal or objective date range is 5/15/15 - 12/31/15. This statement will start to display in the marking periods 6/15/15 or later as the first prior marking periods starts prior to the goal/objective start date.

- **Options, Manage Progress Reporting:**
  - The ability to change a Progress Reporting date, even if data exists for that progress date, is now available for administrators. This will enable administrators to change the progress due to snow storms for example. A warning message will appear advising this will change the reporting date for all students using that template.

  ![Message from webpage](image)

  - The ability to not require Progress Code drop down selection is now available. Depending on how you have things setup, you can indicate where Progress Code drop downs are 'Not Used or Not Required' in addition to the progress text box. **ACTION ITEM:** You will want to go into Options, Manage Progress Reporting, General Options and setup your districts preferences.

  ![General Options](image)

- Printing Progress Report:
  - A report change has been made to include printing of all periods, including final, when the Print as of Date is greater than the IEP range. For Example: My IEP went from 10/28/13 - 4/7/14, printing with as of today, 10/21/16, printed all periods including 'Final'. I did not have to enter the original end date of the amended IEP. Using a print as of date of 4/4/14, progress will only print up to that date.
  - The Objective heading will now only display the objective number (ie Objective # 1.4) instead of Academic Objective - Objective #1.4 for example.

- **Documentation Updated:** Progress Reporting Admin Guide, Progress Reporting User Manual
**Version 4.3.250.63034**  
December 9, 2016

**504 Referral for Assistance**  
504 Referral for Assistance, Section B. 1., if the box for Visual Impairment is selected, it will no longer check the box for Minimal Brain Dysfunction.

**Utilities, Mass Update Staff**  
The Mass Update Utility for Service Staff has been modified to not return an error message of 'Multiple Staff found' when staff on a service has the same staff member listed multiple times with start date and end dates. The process will now replace only the active staff member as of the 'active as of' date indicated.

**System Options, Set Student Access Option, StudentAccessGracePeriod**  
It will no longer display an error when the Grace period is only a single digit and a user tries to add or edit new user or group in the security section.

**Data Integration - Rule: eSchoolPlus- Race (Multiple)**  
This rule will no longer download the percentage into the race field in error when the user accidently blanks out the percentage field in IEPPLUS.

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**Version 4.3.250.63023**  
November 23, 2016

**Support Link**  
The support link has been updated to go directly to https://support.sungardk12.com.

**IEP Validation**  
Next ETR date has been modified to look at the alternate code of ETRD when validating IEP form for the Next ETR Due Date.

**EMIS Upload**  
Updated EMIS Upload to upload the Meeting record and related data need for EMIS reporting for an AIEP meeting.

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**Version 4.3.250.63020**  
November 10, 2016

**IEP Validation**  
Updated Rule #45433 to properly validate based on if the student has a NIEP record or not.

**Prior Written Notice Report**  
IEPPLUS Version 4.3.248.63003 modified this report to *not* print the 'Type of Action Taken' if it was not marked to reduce its length. This change has been reverted back to print the entire form based on a directive from the ODE.

**504 Evaluation Report, FBA Report**  
Updated 504 Evaluation Report and FBA Report to print instead of showing an the error 'path not found' for some clients.

**504 Evaluation Report**
Updated the form to load correctly when there is no meeting attached to the form.

**Data Integration Rule: eSP - Inactivation Rule #2**
Modified this rule to inactive a student in IEPPLUS when a student's enrollment record has (or does not have ) an enrollment start date.

**Version 4.3.250.630007**
October 28, 2016

**Improve System Performance**
We have improved the loading of all forms in IEPPLUS by optimizing the query that counts the number of files attached to a student and/or the number of characters in a text box when the form is loaded.

**Data Integration Rule: eSP - 504 Plan Rule #2**
Updated data integration rule to check for record existence before insert into the REG_PROGRAMS table to avoid the primary key violation error.

**Version 4.3.250.63003**
October 18, 2016

**IEP**
- **Present Level section:** Updated web form to display line breaks correctly for Present Levels, Goals and Objectives instead of appearing as a single paragraph.

**IEP, Services Plan, and Transfer Review**
- **Present Level sections:** Updated report to print the present level data without a blank page if it doesn't fit on one page

**IEP, Transfer Review, and Section 504 - EMIS Section**
- **Meeting Record / EMIS:** A new 'End of Course Exams' area has been added to the Meeting record. This information will also display on the EMIS Summary screen and EMIS Summary Report.

- **Ohio EMIS Summary Report:** This report has been updated to include the 'End of Course Exams' selections.
• Documentation Updated: IEP, Service Plan, Transfer Review Form, EMIS Upload Wizard doc, EMIS Data Mapping

**EMIS Upload**

• **End of Course Exams**: The EMIS upload has been modified to include the End of Course Exams process into eSchoolPLUS, Screen 612, Fields 14-23.

• **Enrollment records**: Updated the process to reinitialized enrollment records when it changes. For example a student's Enrollment was Special Education, changed to Section 504 and then changed again back to Special education. The upload will only report the student for the time it was in the Special Education enrollment date ranges.

**Student Summary Screen**

Updated the Summary Screen to show the address of the student contact. If the address is the same as the student it will display 'Same as student'. If the address is different, it will display that address.

**Suspension Report**

Updated the report to use the event start date as the event end date when this field is blank to eliminate the event from appearing to be open ended and ongoing.

**504 Data Integration**

Updated data integration rule 504 Plan Rule #2, to upload a unique 504 enrollment record. It was duplicating the enrollment records if there were multiple alternate codes.

**Version 4.3.248.63003**

September 30, 2016

**Advance Reporting - Student Cost**

Modified this report to exclude Section 504 and Gifted enrollment records.

**Prior Written Notice - PR-01**

This report will print only the 'Type of Action Taken' selected instead of all options to reduce the length of the report. This is dependent upon how much data is entered in the various text boxes or how many check boxes are selected. For example,
Validation Rules

New Validation rules have been added as follows:

- **ETR, Validation Rules:**
  - **Rule 45630 - ETR - 4 - Enrollment/Disability Start Date:** For an IETR, the enrollment start date and the disability start date should be the same as the meeting date.
  - **Rule 45705 - ETR - EMIS Meeting Event Non Compliance:** For an IETR, this rule will compare the meeting date to the Referral Consent date. If it is over 60 days, a non-compliance reason must be indicated and be other than "~Not Applicable."

- **IEP, Validation Rules:**
  - **Rule 45433 - IEP - EMIS - Meeting Event Non Compliance:** If the IEP meeting is greater than 365 days from the Important Date of Next IEP Review date, the user must select a non-compliance value other than "~Not Applicable."
  - **Rule 45015 - IEP - Start/End Date:** This rule will be displayed when the IEP length is greater than one (1) year.
  - **Rule 45338 - IEP - 12 - Missing 3rd Grade Reading Guarantee:** If the student is in grade 2 or 3 during the IEP date range, this rule will display if one of the three check boxes for 'Third Grade Reading Guarantee' is not checked.
  - **Rule 45020 - Cover Page - Next ETR Due Date2:** This rule will display in the IEP as a 'Warning' if the next ETR is past due or the ETR is not yet finalized.

Service Plan Validation Rules

Validation rules are now available for the Service Plan, EMIS Section which function like the IEP.

EMIS Upload

The EMIS Upload, eSchoolPLUS Screen 618, Field 16 will only report LRE Outcomes with applicable meeting types for a meeting date that is **on or prior** to today's date.

**Version 4.3.239.63001**

September 16, 2016

**ETR**

Modified the disability creation process on the ETR, it will now create the disability start date as of the meeting date.

**EMIS Upload**

Updated the EMIS upload process to properly ignore the 504 enrollment record when checking to see if a disability exists.

**504 Notice of Conference**

- Removed extra white space on the report so the Parent response section can fit on one page.
- When student is invited to the meeting, the Notice of Conference check the student checkbox on the report under meeting attendees.

**504 Referral for Assistance**

Added word 'Deficit' in the Attention Disorder/ADHD line.
1. Check suspected physical/mental impairment and attach data sources supporting the diagnosis.
   - Asthma
   - Attention Deficit Disorder/ADHD

**System wide option>Copy 504 data**
The System-wide option 'Copy data from previous 504' will now display correctly for all users that have access to the screen. **Action Item:** If you wish to active this feature, you must update your System-wide option.

**Data Integration, ESP - 504 Plan Download Rule**
This custom rule will download all eSchoolPlus 'reg_programs' records, with a state code equivalent value of '504', into IEPPLUS, Student, Basic Information, Enrollment/Exit for a specific student.

**Utilities, Student Inactivation**
Updated screen to displaying "Unable to inactivate student - Progress found after inactivation date" message if the checkbox for "Delete Future Records" is selected. Future records must start *after* the inactivation date for this message to appear.

**Utilities, Import Goal Book**
Import Goal book functionality, located under Utilities, will now work without any issue in Firefox browser as well.

**System Options, Forms**
New option available to "Prevent All forms from being created when an unfinalized form already exists?" If you wish to turn on this new feature go to System Options, Forms.

**Security, User or Group, Student Grace Period indication**
When Options, Set Systemwide Options, Administration, Set Student Access Option area indicated a specific date for any of the available options (for example: ActiveDate = xx/xx/xxxx), Security, User and Group permissions text of 'Student Access Grace Period ___ Days' will now display 0 ' instead of that date. If the number of days for a 'StudentAccessGracePeriod' is entered correctly (for example =30), then 30 will appear in 'Student Access Grace Period ___ 30 ___ Days. Documentation for the various System Options, Set Student Access options, is located in the Help Files under Administration, System Options.

**Version 4.3.234.63006**
August 19, 2016

**Data Integration**
Updated the Enrollment grade and location rule to create the correct enrollment type when the previous enrollment has ended for the school year.

**Section 504 Manifestation Determination Summary**
A new 504 form and report is now available, based on security, and validation rules are also included. Documentation for this form can be found in IEPPLUS, Help, Forms, OH Forms, OH 504 Manifestation Determination Mapping. If you wish to receive this new form, please enter a support case requesting to be updated.

**Version 4.3.232.63013**
August 12, 2016

**Parent/Guardian Excusal form**
The user now has the ability to lock and finalize form with the correct permissions.

504 Accommodation Plan
- System Options, Form: There is a new system option setting which will copy last year's 504 plan data into a new Section 504 plan when a new form is created if the option is checked.
  
  **ACTION ITEM:** If you wish to take advantage of this feature for your district you must turn it on in System Options, Form Tab, scroll down to 'Copy data from previous 504 Plan'

- Revise/Amend: This feature has been added to the Section 504 Plan. This includes the ability to select a 504 amendment meeting date, enter meeting participants for this meeting as well as adding the Amendment block.
- Meeting Participants will no longer auto create the position of Intervention Specialist.
- Documentation has also been updated with the changes reflecting how to amend a form, remove an amendment etc.
- Modified the form to reflect the student role ID on the web form.

504 Evaluation Report
- Revise/Amend: This feature has been added to the Evaluation Report. This includes the ability to select a 504 amendment meeting date, enter meeting participants for this meeting as well as adding the Amendment block.
- Documentation has also been updated with the changes reflecting how to amend a form, remove an amendment etc.

Reporting
- Inactivation report: Updated the report to look at the latest 'enrollment type' to determine whether the student was inactivated.
- Unfinalized Non-IEP Form Report: Corrected the report to exclude forms that are finalized

Advance Reporting
- Student Cost Report: Updated the Student Cost report to look at the latest staff member attached to the placement if a Case Manager is not found. If no staff member is found, then it will not display a staff member on the export.
- EMIS Error Report have been modified to display the number of records processed on the selection screen.

System Options, Advanced Reporting Tab
- Initial Referral Aging: Modified text on the selection screen to correct a typo (Referral)

Data Integration
Updated the Enrollment, Grade and Location process to properly end the previous enrollment record and create the new enrollment record when the rollover on eSchoolPLUS has occurred.

**Version 4.3.230.63001**
July 22, 2016

Referral Drop-Down
Updated the referral drop-down when creating a form, such as 'Create ETR' or 'Referral for Evaluation', to only show referral types that are active.

504 Accommodation Plan
- The CSD # has been removed from this form.

504 Evaluation Report
• The CSD # has been removed from this form.

**504 Prior Written Notice**

• The CSD # has been removed from this form.

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**Version 4.3.229.63000**

*July 1, 2016*

**504 Evaluation Report**

Updated the 504 Evaluation Report->Eligibility Section to show the explanation on the printed version when the checkbox 'No' is checked.

- The student is not eligible under Section 504/ADA as a person with a disability.
  Does this student nevertheless need accommodations/modifications/interventions?

  - No
    Explain: ddddd
  - Yes
    Indicate the type of plan to be written:

**IEP**

Updated the IEP, Medicaid Reports to center the logo on top of the printed report.

**Meeting**

Updated meeting screen to show LRE Outcome (Oct. 31) for meetings with EMIS code like '%IEP%' only

**PLUS360 Notification**

Fixed Meeting Invitation rule where it wasn't sending a notification for eSchoolPLUS users invited to a meeting.

**Student Cost Extract Report**

*Reporting, Advanced Report, Student Cost Extract:* Districts requested a single report that assist in determining the cost of a student. A new extract file has been added to find all students within the reporting date range with an Enrollment type of Special Education, Alternate Code = SE. You can select specific related services (or leave blank for all), include Transportation and select finalized records only or all student records.

Fields include Student Name, ID, State ID (Alternate Code = SASID), Placement (Primary and Non-Primary), Start/End dates, Placement Names, Location/Length/Level of Intervention, Case Manager and Related Services with Frequency/Duration.

**Additional Forms**

Updated the additional forms rich text box to properly allow line breaks when entering data. This will no longer cause an issue when selecting print preview.

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**Version 4.3.223.63000**

*June 9, 2016*

**Summary of Performance**

Modified the form to require the 'Date of Implementation' to be required. This date field is displayed on the summary screen and used as the link to open an existing form.

**EMIS Upload Process**
• Updated the EMIS upload process to check to see if the previous EMIS outcome end date is greater than the EMIS outcome start date. If it is then it would use the meeting date plus 1 year minus 1 day to get the outcome end date.
• Updated the EMIS upload process to ignore the validation of secondary planning value when student has a service plan. When the student has a service plan, EMIS should always upload ‘~~~’ regardless of student age.

**Progress Reporting**
Improved the performance and optimize the manage progress reporting display when user click on manage progress reporting.

**Version 4.3.220.63004**
May 25, 2016

**504 Notice of Conference**
Updated drop down for Meeting Purpose = Other to only display meeting reasons with EMIS code = 504Other.

**EMIS**
EMIS upload will now upload the placement, secondary planning value correctly from 2nd placement record when there are 2 primary placements within IEP date range and linked to an IEP.

**Progress report**
• Updated the progress report to properly show the Need statements.
• Modified the progress report to accept non-numeric goal code numbers.

**Advance Reporting**
Updated the Last refresh date to reflect the user that has refreshed the report, where appropriate. Each user will have their own record count and date and time for when the data was refreshed.

**Notifications**
New options have been added for additional control of Notification Processing.

**Action Item:** If you wish to take advantage of these new options, you will need to go to **Options, Set Notification** tab and enter the number of days you wish the system to use. The number of days is currently set to '0'.

• *Evaluation/Re-Evaluation Has Expired for a student:* This option can now indicate how far back a notification should fire for active students. If a new evaluation has been created but is not yet finalized, this rule would still fire until finalization to alert the user there is no current form in place.
• *Form Has expired:* A new option now provides the ability to indicate how far back a notification should fire when a form is missing or a new form exists but has not yet finalized. For example, entering 365 'Historical days to search' would make the system look back for only one year. This eliminates historical un-finalized forms from being reported.
• *Progress Reporting Past Due:* If you do not wish Progress Reporting to send a reminder for an IEP that starts x number of days (ie 30 days) before the next progress reporting period, entering a number in 'Low Day' will count the days and determine whether to skip this marking period for that student and not send a message. Historical days identifies how far back it should report missing progress.
Two individual notification messages have been modified to assist in identifying when a form has expired, a new form *may* exist but is not yet finalized so technically the student still has an expired form.
  - Student's Evaluation has expired, No Finalized Evaluation exists
  - Student's IEP has Expired, No Finalized IEP exists

**Help**
An End/Beginning of School Year Check List has been added under Administration, End of Year Checklist.

**Data Integration, Export, Student Data**
Updated the export process to display the student ID on the data integration summary report.

**Cognos report**
Updated User Security permission to mark all areas as available when the 'Restrict application access' is not checked, indicating the user is an administrator and has access to all areas. This change will not affect any existing user permissions.

**Version 4.3.216.63000**
May 9, 2016

**Progress Reporting**
Updated the web form to display the goal category, subcategory and level to match the report if option is
Progress Reporting, Validation
Updated validation result to open the correct goal when the option to 'display goal code' is turned off.

TAC Student Drawer
Updated the TAC Student Drawer to fix the System : NullReference Error.

Version 4.3.213.63001
April 25, 2016

ETR
Section 1 & 2- Corrected a page break issue. The title and text belonging to that title will now print together.

Transfer Review Form
- Section 8, Transportation as a Related Service: This section has been added to this form as well as security and validation rules.
- Section 12, Statewide and Districtwide Testing: The validation rules from the IEP have been added to this section.

504 Accommodation Plan
Updated the 504 Accommodation Plan to fix typos on the report
  o Date of Diagnosis
  o Section III: ...activities..., Evaluation Procedure
  o Section VI: Notice...and...
  o Section VII: ...share this plan...

Student Drawer
- Updated the Student Drawer, RC/IPR/TRN Section to allow users to enter information to filter data. These fields are no longer greyed out.
**Version 4.3.211.63004**
April 8, 2016

**Progress Report**
Progress Reporting Report did not match the web form when the goals printed. The goals were not in sequential order. This has been corrected.

**Service List report**
Report no longer required an active placement. This report will look to the student’s enrollment record to insure reporting of services for active students.

**Notifications**
Student Summary Screen will no longer show 'No active IEP' alert when there is indeed an Active IEP.

**Parent Consent for Evaluation**
This report will now print the Evaluation Type correctly.

**504 Evaluation Report**
Updated the 504 Evaluation Report to properly show the checkboxes for 'Major bodily functions that are substantially limited' on the print out of the report.

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**Version 4.3.207.63011**
March 31, 2016

**Referral Reason**
Updated edit referral process to allow the editing/adding of the referral reason.

**Mail Salutation**
Extended the mail salutation field from 48 characters to 96 characters to allow for longer data entry.

**Invitation Letter Report**
Updated report to print checkboxes under "Other persons who have been invited to attend this meeting include:" to always print

**ETR**
Corrected issue for ETR, Section One, where the attach image popup closes by itself instead of remaining open to select an image for attachment.

**IEP/ETR**
Updated District of Service to save properly. It didn't save if the record was different from system default organization and started before the form start date and data was changed from a building to the system default organization.

**Services Plan, EMIS Summary Section**
Corrected permission issue for EMIS summary section in the services plan form

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**Version 4.3.207.63001**
March 18, 2016
**ETR**
Updated Section 2 of the ETR to properly save the checkbox "Section 2 Completed" when checked.

Updated the ETR-Eligibility section to add image and lookup functionality to the Basis for Eligibility Determination text box.

**Progress Reporting**
Updated the progress report to display goals in the same order as displayed in the IEP.

**Service Plan Report**
- Modified the 'Next Services Plan Review Date' to print properly on the report.
- Modified security for the EMIS Summary section to use its own permissions; it was using the security permission from the IEP.

**EMIS Upload**
Corrected EMIS upload process to upload the correct LRE outcome code as of the LRE submission date. It was uploading an LRE outcome from a later meeting if the prior meeting doesn't have LRE outcome code.

**Overdue IEP report**
Updated Overdue IEP report to only include students with active enrollment type = Special Education

**Version 4.3.206.63000**
March 2, 2016

No changes

**Version 4.3.205.63000**
February 26, 2016

**ETR**
- **Section 1:** Corrected an issue where the 'Area of Assessment' was not printing.
- **Section 3:** Corrected an issue where the 'Text Box F, Observation' was not saving on the form.

**Section 504 Prior Written Notice**
Corrected a typo on the report on the 504 PWN where question 2 had school misspelled.

**EMIS Upload**
Modified the EMIS upload to ignore enrollments with '504' and eliminate error messages.

**Reporting**
**Advanced Reporting, Medicaid Student List:** A new report is available that will search for all active students with related services as of the Service date indicated on the opening screen. Select 'Refresh' to gather data. Run to print the report, Export to manipulate the data in Excel and the Docs icon will provide 'How to' instructions.

- **Action Item:** Setup Instructions:
  - Maintenance, Manage Code Tables, Identifications:
    - To display the Medicaid Identification number, the identification type must have an alternate code type = Alternate with a description = CIN.

**PDF Streaming**
Updated PDF streaming to always pull the latest PDF. In the event that a form has been finalized and then unlocked, it will still display that latest PDF instead of reverting to the previous PDF (ie last year). PDF streaming looks for the latest form based on the latest IEP Form Start Date and latest pdf found.

**Version 4.3.202.63001**
February 15, 2016

**Evaluation Team Report**

**Attach Images** - New functionality has been added to the form that enables a user to attach an image directly within the ETR form. A SunGard representative will need to activate this feature.

An 'Attach Image' link is displayed under sections of the ETR (see image below). The images will appear and print in the applicable area.

![Attach Image](image1)

**Goal book Statements** - New functionality has been added to the form that enables a user to select items within a goal book. A SunGard representative will need to activate this feature.

When the user clicks on the text box, a pop-up screen (see image below) appears. An additional section appears (in red) displaying a Goal book and Category with goal book items the user may select.

Set-up must be done for this feature. A Goal book called SPS Default Goal Book as well as applicable Categories must be added. See the Ohio IEP user guide for more information on configuring the goal book.

![Goal book Statements](image2)
Version 4.3.199.63006
February 8, 2016

IEP/Service Plan/Transfer Review
Updated the form creation process to properly create the assessment accommodation check boxes in the Section 12 of these forms.

Progress reporting
Issue has been fixed where clicking on the goal at bottom of the page will anchor to the top of the page.

Prior Written Notice
Modified the report to remove extra blank spaces located on Question "2. A description of the action proposed or refused by the school district."

504 Notice of Conference
Corrected a typo in the sentence 'I will attend this meeting at the time stated.'

504 Referral for Assistance
Removed the word 'the' in the sentence '4. Indicate how any major life activity(ies) and/or major bodily function(s) (is)(are) substantially limited'.

Version 4.3.197.63002
January 19, 2016

EMIS Data Integration
Updated the EMIS Upload process to delete the SEMD meeting in eSchoolPLUS and reinsert it, this would prevent the same data to be inserted every time data Integration runs.

Progress Reporting
Objective text wasn't fitting in the displayable area. If text is bigger than the displayable area, a scrollbar will appear.

PLUS360 Notification
Fixed the issue where 'You are invited for meeting' rule was not generating error when cross-product notification is turned on and user has 'esplogin' information entered in the staff identification record.

Medicaid Billing
Fixed the issue where it was giving error 'Diagnosis code missing' when creating an electronic file.

Version 4.3.196.63002
December 17, 2015

IEP Report
Section 7: Modification, Accommodation and Support for School Personnel has been modified to print all statements within the date range of the IEP. Statements ended prior to an amendment meeting will also display on the report as they were in effect during the IEP date range.

IEPPLUS Notification
Updated the notification rule which advised if the student did not have progress for a reporting period. This rule will no longer submit a notification when the student was not active during that reporting period.

**Data Integration**
Modified the eSP - Discipline Deletion Rule#2 to only delete the event outcome that was removed in eSchoolPlus.

**Version 4.3.194.63000**
December 10, 2015

**Progress Report Audit**
Updated the report query that caused a performance issue when trying to refresh the data.

**EMIS**
The new EMIS Code 'SEMD' (Manifestation Determination Date) is now uploaded to eSchoolPlus, Screen 612.

*Action Item: Meeting Type Code Table Setup: the meeting type must have an Alternate Code type of 'EMIS Code' and description of 'SEMD'.*

![Image](image-url)

**Version 4.3.192.63000**
November 24, 2015

**Progress Reporting**
Updated progressing reporting to ignore the category if none is selected in the IEP when trying to open the goals in the progress report screen. The client will no longer experience any errors when trying to open the any of the goals.

**Version 4.3.191.63004**
November 13, 2015

**System Wide Option**
Removed Old IEP checkbox from the list for eSchoolplus PDF Display under Systemwide option>Administration tab and fixed the issue where IEP checkbox is not getting saved and display correctly.
Version 4.3.189.63007
November 6, 2015

All WebForm Reports
Updated reports for client logo image to print to the actual picture size so it doesn't stretch out if it's too small.

System Wide Option
Fixed the issue where system-wide option 'Prevent new SP and 504 Form creation when Unfinalized already exists' wasn't saving.

Student Summary Report
Updated the Student Summary Report for the placement label '% of time in SE' to look at Maintenance, Manage Screen Configuration record to display the default of '% of time in SE' or the text entered as the description.

Please see Ohio Archived Release History for previous release note information.