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## Filing, Finalizing, and Uploads to History SpEd Forms & Cum folder Info

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**FILE** - paper copies/digital copies of all documents generated during the current school year in the **SpEd portion of the student's district cum folder**. If your district has not gone digital with files, then each student should have a SpEd brown pocket folder with five colored file folders: Current IEP/IFSP, Current ER, Previous IEPs, Previous ERs, and Miscellaneous.

- IEP/IFSP, any IEP Amendments, Positive Behavior Support Plan
- Team Meeting Notice
- Record of Attendance/Sign In page from the meeting
- IEP Progress Reports
- IEP PWNs
- Eval Plan PWN if assessed
- ER if assessed OR Non-Eval Documentation, Stand Alone FBA
- ER signature page if required (LD)
- Protocols if they are an identifiable educational record for the student. Place in the current ER folder with the ER and Eval Plan PWN

### **FINALIZE (SpEd Forms History) info:**

- Before finalizing, please make sure you use your district's Google Form process ASAP for newly qualifying students and for any changes in SpEd values so the Student Information System funnels accurate information into MARSS and SpEd Forms so the records contain accurate information when you finalize them.
- Check** before finalizing: is the Disability, SpEd Eval Status, Federal Setting and Transportation Code correct on documents?
- IMPORTANT! Check before** making changes on a Service Plan (IEP, IFSP) to make sure the current one has been finalized. Miss this step and you will lose an electronic version of that IEP, and any Progress Reports you write may have the wrong IEP attached or disappear!
- Service Plans (IEP, IFSP)** validate and finalize. Include Positive Behavior Support Plans if applicable.
- Prior Written Notices** - all PWNs should be finalized and filed.

- ❑ **IEP Amendment** - if you amend the IEP, the prior written notice/consent form and the Amended IEP should also be finalized and filed. If you use the Agreement to Amend form (it's optional), then finalize that as well.
  
- ❑ **ERs, Stand Alone FBAs, and Non-Eval documents** should be finalized and filed.

**UPLOADS: (optional)**

SpEd Forms will allow you to upload pdf documents into the history file of a student. It does not take the place of putting copies in the student's cum folder, but it is a convenient option to have relevant information readily available. There is no requirement to upload into SpEd Forms history.

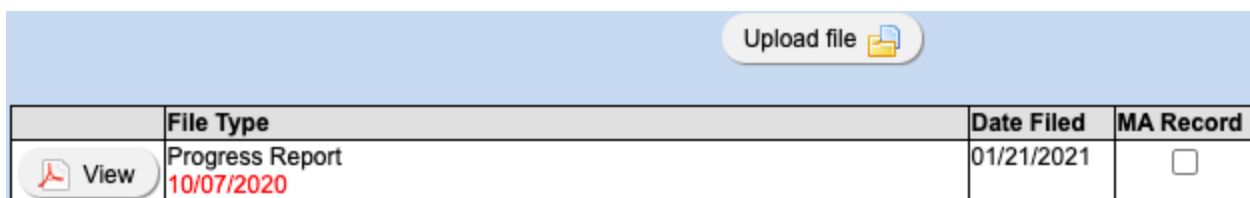
Some things you may consider uploading:

- ❑ Previous IEP and ER when a student moves in from a district that doesn't use SpEd Forms, or an out of state student.(recommended practice)
- ❑ Medical diagnosis
- ❑ Evaluations conducted outside of the school setting
- ❑ Parent/Guardian's written note to revoke SpEd services
- ❑ Evacuation plan if relevant for that student

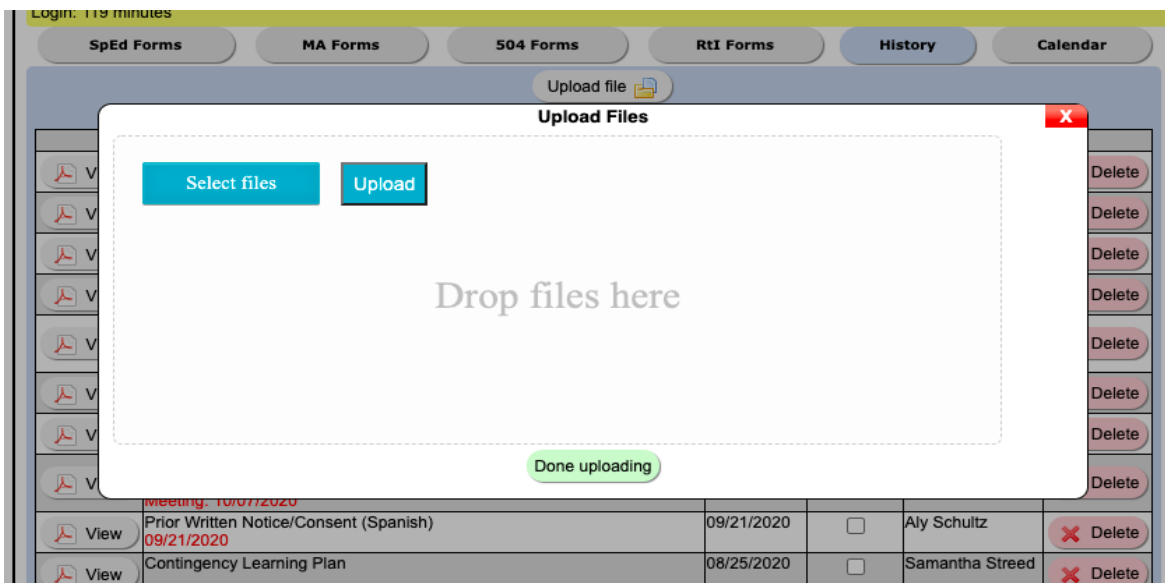
**Process:**

If you don't have the document in a pdf version on your desktop, then scan and fax paper documents to your email and download to your computer desktop. If you are unsure of how to do this, check with a colleague or your technology coordinator.

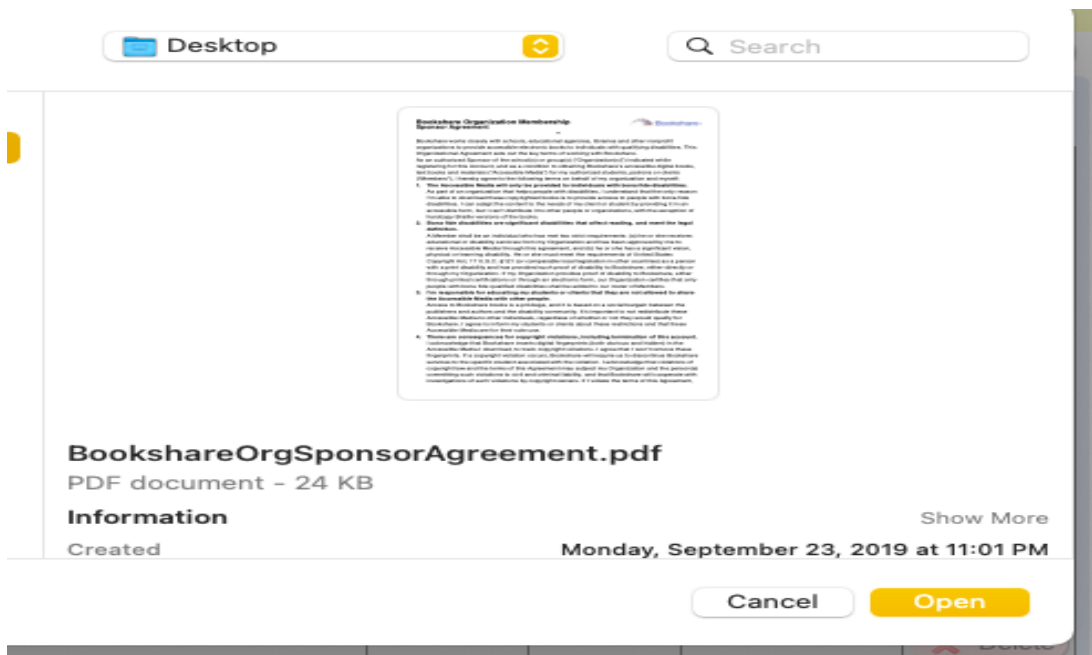
Step 1: Choose the Upload File button at the top of the SpEd Forms History Page



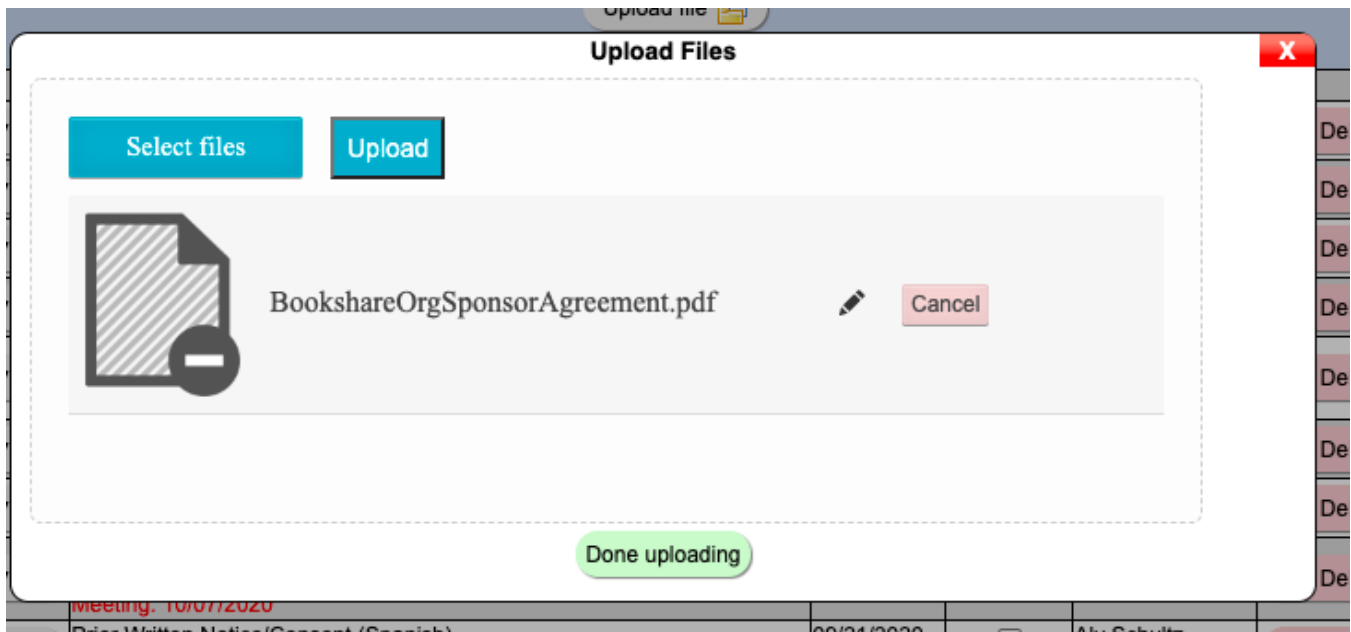
Step 2: You will see this screen. You can drag and drop a file into the white square OR choose Select Files and that will go to your computer to find a file.



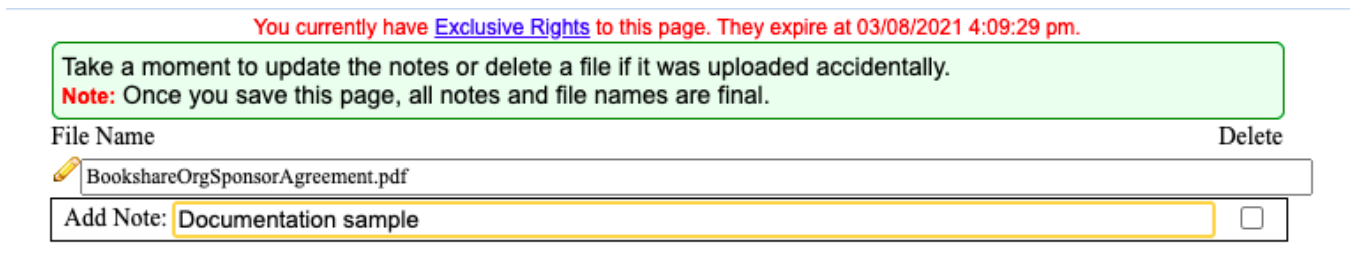
Step 3: Choose "Open" if you are selecting a file from your computer vs dragging & dropping.



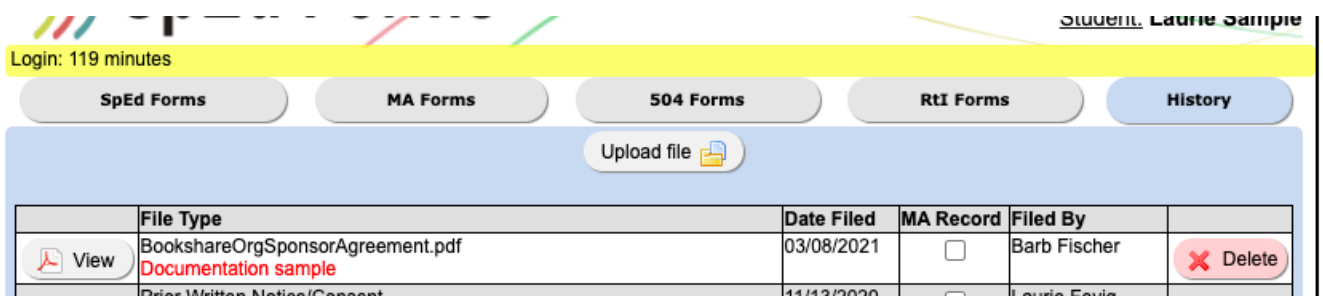
Step 4: Once you have a file/files in the white square you need to choose Upload and then Done Uploading.



Step 4: You will see the next screen and can add a note if you need to clarify anything.



Step 5: Choose Save and your history list will now have that document and your note.



Last Edit: 3.8.21 by Barb Fischer