

User Type	User Definition	Student Record Access	Page Access																					
EdPlan/EasyIEP Administrator (Admin Edit)	This might include a Supervisor, Director of Special Education, or EasyIEP Administrator within the district. This person oversees students' IEPs and evaluations as well as the provision of services. They manage all student enrollment records and ensure that students are assigned to a school, grade level and a case manager. They are responsible for state and federal reporting.	<ul style="list-style-type: none"> • Any student (all schools, all grades, system contacts) • Assign next school • Assign teacher • Enter restraint and isolation data • Add/edit district calendars and reporting periods • Edit MOTD • View school/user/student/ custom compliance • IEP team member • Assign IEP team members • Add users and assign user type • Inactivate/manage users • Inactivate/reactivate students • Manage user service certifications/EasyTRAC • Access process wizard • Upload external documents • Remove unrecognized fax • Enter Alternate Assessment info on Eligibility tab • Impersonate users • Delete documents/events (permissions on user's page) 	<ul style="list-style-type: none"> • Edit/view all pages • Create and finalize all documents • Edit all pages <u>except</u> the following fields on the Personal Demographics page: state ID #, school or grade level • Enter education environment • Create all reports • Reports to keep: <ul style="list-style-type: none"> • Final Combination Table 1 and 3 Dec. 1 Report • Create and submit Eligibility and Evaluation Timeline Extension Requests • Edit Status of Service on Eligibility tab 																					
<div style="text-align: center; border: 1px solid black; padding: 5px;"> Main Menu Students My Docs Wizards Administrator 1.2 PCG </div> <table border="1" style="width: 100%; text-align: center; border-collapse: collapse; margin-top: 5px;"> <tr> <td style="background-color: #d9ead3; padding: 2px;">School System</td> <td style="background-color: #d9ead3; padding: 2px;">System Info</td> <td style="background-color: #d9ead3; padding: 2px;">Reports</td> <td style="background-color: #d9ead3; padding: 2px;">Assign Schools</td> <td style="background-color: #d9ead3; padding: 2px;">Inactive Students</td> <td style="background-color: #d9ead3; padding: 2px;">User Types</td> <td style="background-color: #d9ead3; padding: 2px;">External Systems</td> </tr> <tr> <td style="background-color: #d9ead3; padding: 2px;">Main Menu</td> <td style="background-color: #d9ead3; padding: 2px;">Summary</td> <td style="background-color: #d9ead3; padding: 2px;">Lists</td> <td style="background-color: #d9ead3; padding: 2px;">Assign Teachers</td> <td style="background-color: #d9ead3; padding: 2px;">Inactive Users</td> <td style="background-color: #d9ead3; padding: 2px;">User Type Assign</td> <td style="background-color: #d9ead3; padding: 2px;"></td> </tr> <tr> <td style="background-color: #d9ead3; padding: 2px;">Personal</td> <td style="background-color: #d9ead3; padding: 2px;">Contacts</td> <td style="background-color: #d9ead3; padding: 2px;">Eligibility Process</td> <td style="background-color: #d9ead3; padding: 2px;">IEP Process</td> <td style="background-color: #d9ead3; padding: 2px;">504 Process</td> <td style="background-color: #d9ead3; padding: 2px;">Documents</td> <td style="background-color: #d9ead3; padding: 2px;"></td> </tr> </table>				School System	System Info	Reports	Assign Schools	Inactive Students	User Types	External Systems	Main Menu	Summary	Lists	Assign Teachers	Inactive Users	User Type Assign		Personal	Contacts	Eligibility Process	IEP Process	504 Process	Documents	
School System	System Info	Reports	Assign Schools	Inactive Students	User Types	External Systems																		
Main Menu	Summary	Lists	Assign Teachers	Inactive Users	User Type Assign																			
Personal	Contacts	Eligibility Process	IEP Process	504 Process	Documents																			

User Type	User Definition	Student Record Access	Page Access
School Psychologist	<p>This person is responsible for helping the team establish the student's eligibility for and need of special education services. Psychologist are responsible for entering Alternate Assessment information on the Eligibility tab.</p>	<ul style="list-style-type: none"> • Students at own schools (all grades) • Case manager • IEP team member • Assign IEP team members • Inactivate students at own schools • Reactivate students at any school • Assign case manager • Upload external documents • Add/remove doctor authorization for services • Add Medicaid consent/ eligibility • View user actions • View draft documents • View user/student compliance • View school level reports (own schools) • Enter restraint and isolation data 	<ul style="list-style-type: none"> • If case manager, can edit all pages • Edit all pages <u>except</u> the following fields on the Personal Demographics page: state ID #, school or grade level • Enter Alternate Assessment information on Eligibility tab • Create Eligible/Non-Eligible documents • Create Re-evaluation documents • Create draft timeline extension requests • Create All Docs except Final IEP • Create Service Plan • View all other documents • Create all local and miscellaneous reports • Create Restraint and Isolation document • If case manager, can edit all documents and create all reports • Edit Status of Service on Eligibility tab • If Case Manager or IEP team member, can edit Alternate Assessment page

Main Menu Students My Docs Wizards Schools School System My Info  PCG

Personal | Contacts | Eligibility Process | IEP Process | 504 Process | Documents

User Type	User Definition	Student Record Access	Page Access
<p style="text-align: center;">Certifying Specialist (Building Admin)</p>	<p>This person is responsible for helping the team establish the student's eligibility for and need of special education services. This user type may include Speech Language Pathologist and Hearing/Vision Specialists.</p>	<ul style="list-style-type: none"> • Students at own schools (all grades) • Case manager • Assign case manager • IEP team member • Assign IEP team members • Assign teacher (case manager) at own schools • Access process wizard • Upload external documents • Add/remove doctor authorization for services • Add Medicaid consent/ eligibility • View user actions • View draft documents • View user/student compliance • View school/user reports • Inactivate students at own schools • Reactivate student at any school • EasyTRAC 	<ul style="list-style-type: none"> • Edit Eligibility tab • Edit Status of Service on Eligibility tab • Edit all pages <u>except</u> the following fields on the Personal Demographics page: state ID #, school or grade level • Create all documents • Create Eligible/Non-Eligible documents • Create Re-evaluation documents • Create draft timeline extension requests • View all other documents • Create all local and miscellaneous reports • If case manager edit all pages and create all documents • If case manager or IEP team member, can edit Alternate Assessment page

Main Menu Students My Docs Wizards Schools School System My Info 112 516 PCG

Personal | Contacts | Eligibility Process | IEP Process | Documents

User Type	User Definition	Student Record Access	Page Access
<p style="text-align: center;">Related Service Provider</p>	<p>Assigned to more than one school and typically have many students on their caseload. They are required to provide therapy to help students meet their annual goals. This user type may include OTs, PTs, COTAs, PTAs, Speech teachers, and Hearing/Vision Specialists. This may be an employee of the district.</p>	<ul style="list-style-type: none"> • Access to own students • IEP team member • Upload external documents • Log, view, and delete related services in EasyTrac • View user actions • View draft documents • View user/student compliance • View user level reports • EasyTRAC 	<ul style="list-style-type: none"> • View all pages • Edit all pages except Personal Demographics and Eligibility pages • Create draft IEP, draft progress report • If IEP team member, can edit Alternate Assessment page • If IEP Team Memger, create Reeval Related Service Obsv and Medical Reeval Document • Create Projected Eligibility Rpt, Projected IEP Rpt., and Caseload Reports

Main Menu
Students
My Docs
Wizards
Schools
School System
My Info
PCG

Personal |
 Contacts |
 Eligibility Process |
 IEP Process |
 Documents

User Type	User Definition	Student Record Access	Page Access
District-wide Consultant	Assists with developing plans for students with disabilities, often focusing on specific behaviors and interventions to allow access to the curriculum. These individuals are often involved in additional evaluation and/or assessments of student need. This user type may include Consulting Teachers, Behavior Specialists, or Autism Consultants. This may be an employee of the district.	<ul style="list-style-type: none"> • Students at own schools • IEP team member • Restraint and isolation entry • Access process wizard • Upload external documents • View user actions • View draft documents • View school/user/student compliance • EasyTRAC 	<ul style="list-style-type: none"> • View all pages • Edit all pages except Personal Demographics and Eligibility Process • View all documents • Create draft IEP and draft progress report • Create Restraint and Isolation document • Create all local and miscellaneous reports for own schools • Create Restraint and Isolation report for state reporting • Create ECO Date Rpt • If IEP team member, can edit Alternate Assessment page

Main Menu
Students
My Docs
Wizards
Schools
School System
My Info
PCG

Personal
Contacts
Eligibility Process
IEP Process
504 Process
Documents

User Type	User Definition	Student Record Access	Page Access
<p>School/District Lead (Admin Support Edit)</p>	<p>This person serves as a school or district level leader who is responsible for assigning case loads. This person may also have clerical responsibilities such as scheduling IEP meetings.</p> <p>This user type may include a District-wide Supervisor, Lead Special Education Teacher, or Department Chair.</p>	<ul style="list-style-type: none"> • Students at own schools • All grades • IEP team member • Case manager • Assign team members • Assign case manager • Assign next school • Restraint and isolation entry • Access process wizard • Upload external documents • View user actions • View school/user/student compliance • View school level and user level reports • Add/edit compliance alerts • EasyTRAC 	<ul style="list-style-type: none"> • View all pages • Edit all pages except Personal Demographics • Create all documents except Eligibility • Create draft and final Re-Evaluation documents • Create Restraint and Isolation documents • Create all local and miscellaneous reports • If case manager or IEP team member, can edit Alternate Assessment page • Edit Eligibility Referral, Eligibility Determination • Create Draft Eligibility • Create ECO Date Rpt.

Main Menu
Students
My Docs
Wizards
Schools
School System
My Info

PCG

Personal
Contacts
Eligibility Process
IEP Process
504 Process
Documents

User Type	User Definition	Student Record Access	Page Access
<p>Special Educator (Teacher Edit)</p>	<p>Responsible for meeting the needs of students on their caseloads (annual goals). This person often provides the interventions required to make the student successful and/or manage the individuals that provide a service. This user type may include Special Education Teachers for all grade levels.</p>	<ul style="list-style-type: none"> • Own student caseload • Case manager • IEP team member • Assign team members • Upload external documents • View user actions • View draft documents • View school/user/student compliance • View school level reports • EasyTRAC 	<ul style="list-style-type: none"> • View all pages • Edit all pages except Personal Demographics and Eligibility pages • Create all documents except Eligibility • Create draft and final Re-evaluation documents • If case manager or IEP team member, can edit Alternate Assessment page • Edit Eligibility Referral, Eligibility Determination, Draft Eligibility and SLD • Create Draft Eligibility • Create Proj. IEP and Proj. Elic Rpt. And IEP Services with Location Report

Main Menu
Students
My Docs
Wizards
Schools
School System
My Info
PCG

Personal |
 Contacts |
 Eligibility Process |
 IEP Process |
 Documents

User Type	User Definition	Student Record Access	Page Access
School Staff (Teacher Read)	These individuals help support students' medical/academic needs and may be an IEP team member. This user type may include Nurses, Aides, Guidance Counselors, or Social Workers.	<ul style="list-style-type: none"> • Students at own schools • IEP team member • View draft documents • View school/user/student compliance • View school level reports • Access process wizard • Upload External Documents • EasyTRAC 	<ul style="list-style-type: none"> • View all pages • View all documents • Create letters • Create draft documents • Edit Contacts page • Create Draft Progress Reports • Run All Student Export SPED Only XLS report • Run IEP Services with minutes report • Run Active Student List • Create Local and Misc Rpts

User Type	User Definition	Student Record Access	Page Access
School Administrator (Build Admin Read)	This individual is often responsible for running school level reports and gathering information for administrators to help meet student need. This user type may include a Principal, Assistant Principal, and Testing Coordinator.	<ul style="list-style-type: none"> • Students at own schools • IEP team member • Restraint and Isolation entry • View draft documents • View school/user/student compliance • View school level reports 	<ul style="list-style-type: none"> • View all pages • View all documents • Create Restraint and Isolation Document • Create all local and miscellaneous reports

User Type	User Definition	Student Record Access	Page Access
<p style="text-align: center;">Outside Provider/ Contracted Providers</p>	<p>Recommended for providers who may require access in order to view students on their caseload. This may help them more appropriately provide a service to a student based on their IEP goals. These are contracted service providers not employed by the local LEA.</p>	<ul style="list-style-type: none"> • Own student caseload • IEP team member required • EasyTRAC <p>For Contract Facilities that provide a service to the district such as billing or Medicaid reimbursement, they will have the user type of <u>Outside Provider/Contracted Providers 2014</u> or <u>School Staff 2014</u>.</p> <p>Districts will be required to manage their users' access and make sure they all have the appropriate user type.</p>	<ul style="list-style-type: none"> • View only Goals, Accommodations and Services pages • View draft/final IEP document • Create draft progress report • View draft/final progress report • Create Projected Eligibility and Projected IEP Rpt. • Create Caseload Rpts <p>If the Contract Provider actually provides a service to the student, then assign a user type that will accommodate the providers' need. It's recommended that LEAs use the Special Education 2014 or Related Service Provider 2014 user type. This will give providers access to their own caseload and edit access to all pages.</p>

User Type	User Definition	Student Record Access	Page Access
IT USER 2014	Recommended for IT Staff in the LEA who need to review the student's personal page and review the Import Summary data and Import History files.	<ul style="list-style-type: none"> • Any student 	<ul style="list-style-type: none"> • View students' Personal page • View Import Summary Data • View Import History • Create ADM reports
<p style="text-align: center;"> Main Menu Students My Docs Wizards Schools School System My Info  PCG </p>			

User Type	User Definition	Student Record Access	Page Access
IEP Team Member No Login 2014	User account included if necessary to include on IEP team for the purpose of providing a service. This may include Special Education Aids, Interpreters, and etc.	<ul style="list-style-type: none"> • No Login 	<ul style="list-style-type: none"> • No Login

User Type	User Definition	Student Record Access	Page Access
Superuser	EasyIEP Help Desk manages messages from district and identifies system problems and programming changes required. EasyIEP administrators require access to view and modify records for all students in all counties to include PCG, program developers, State EasyIEP Help Desk only.	<ul style="list-style-type: none"> • Any student • Manually add student records • Delete student records • Assign school/grade level • Impersonate users • Manager inactive students • Manager district calendars and reporting periods • Add compliance alerts • Edit user type permissions • Add schools/school system information • Create system level reports 	<ul style="list-style-type: none"> • Edit access to all • Create all documents • Create all Reports

The screenshot shows a navigation menu with the following items:

- Main Menu
- Students
- My Docs
- Wizards
- Schools
- School System
- Users
- Super User
- PCG

Below this are three rows of sub-menus:

- School System, System Info, Reports, Assign Schools, Inactive Students, User Types, External Systems
- Main Menu, Summary, Lists, Assign Teachers, Inactive Users, User Type Assign
- Personal, Contacts, Eligibility Process, IEP Process, 504 Process, Documents

User Type	User Definition	Student Record Access	Page Access
504 District Admin	These individuals will be responsible for overseeing 504 for multiple districts. These users can access the entire 504 process as well as run reports and activate/inactivate students.	<ul style="list-style-type: none"> • Access to all students • Assign 504 Committee Members • Can be 504 Committee Member • Manage inactive students • Upload external documents • View school/user/student compliance 	<ul style="list-style-type: none"> • Edit all 504 pages • Edit Contacts page • View Personal page • Create all 504 documents • Access inactive students • Create all 504 reports • View Student History page • Manage other 504 users
<div style="text-align: center; background-color: #e0e0e0; padding: 5px;"> Main Menu Students My Docs School System Users My Info </div> <div style="text-align: center; background-color: #d0d0d0; padding: 5px; margin-top: 5px;"> Personal Contacts 504 Process Documents Student History </div>			

User Type	User Definition	Student Record Access	Page Access
504 School Admin	These individuals will be responsible for creating 504 eligibility and student plan documents.	<ul style="list-style-type: none"> • Access to students at own schools • Assign 504 Committee Members • Can be 504 Committee Member • Upload External Documents 	<ul style="list-style-type: none"> • Edit all 504 pages • Edit Contacts page • View Personal page • Create all 504 documents

Main Menu |
 Students |
 My Docs |
 My Info
Personal |
 Contacts |
 504 Process |
 Documents |
 Student History