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| **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.  | * **Any student** (all schools, all grades, system contacts)
* IEP team member
* Assign
	+ next school
	+ teacher
	+ IEP team members
* Enter
	+ Alternate Assessment info on Eligibility tab
* Add/edit district calendars and reporting periods
* Add users and assign user type
* Edit District Message of the Day
* View school/user/student/ custom compliance
* Inactivate/manage users
* Inactivate/reactivate students
* Manage user service certifications/EasyTRAC
* Access process wizard (Caseload Admin)
* Upload external documents
* Impersonate users
* Delete documents/events

(permissions on user’s page) | * View
	+ all pages
* Edit
	+ Status of Service on Eligibility tab
	+ all pages except the State Testing #
* Enter education environment
* Create
	+ all reports
	+ and finalize all documents
	+ and submit Eligibility and Evaluation Timeline Extension Requests
* Reports to keep:
	+ Table 1 & 3
* Can be a Section 504 Team Member
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **School Psychologist** | 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. | * **Students at own schools** (all grades)
* Case manager
* IEP team member
* Assign
	+ IEP team members
	+ Case manager
* Inactivate students at own schools
* Reactivate students at any school
* Upload external documents
* Add/remove doctor authorization for services
* Add Medicaid consent/ eligibility
* View
	+ User actions
	+ draft documents
	+ user/student compliance
	+ school level reports *(own schools)*
 | * Edit
	+ Status of Service on Eligibility tab
	+ all pages except the following fields on the Personal Demographics page:
		- state ID #
		- school
		- grade level
* Enter Alternate Assessment information on Eligibility tab
* Create
	+ Eligible/Non-Eligible documents
	+ Restraint and Isolation document
	+ Re-evaluation documents
	+ draft timeline extension requests
	+ All Docs except Final IEP
	+ Service Plan
	+ all local and miscellaneous reports
* ***If*** case manager, can edit all documents and create all reports
* View all other documents
* ***If*** Case Manager ***or*** IEP team member, can edit Alternate Assessment page
* ***If*** case manager, can edit all pages
* Can be a Section 504 Team Member
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **Certifying Specialist** **(Building Admin)** | 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.  | * **Students at own schools** (all grades)
* Case manager
* IEP team member
* Assign
	+ case manager
	+ IEP team members
	+ 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
	+ draft documents
	+ user/student compliance
	+ school/user reports
* Inactivate students at own schools
* Reactivate student at any school
* EasyTRAC
 | * View
	+ all other documents
* Edit
	+ all pages except the following fields on the Personal Demographics page:
		- state ID #
		- school
		- grade level
	+ Eligibility tab
		- Including Status of Service
* Create
	+ all documents
	+ Eligible/Non-Eligible documents
	+ Re-evaluation documents
	+ 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
* Can be a Section 504 Team Member
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **Related Service Provider** | 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. | * **Access to own students**
* IEP team member
* Upload external documents
* Log, view, and delete related services in EasyTrac
* View
	+ user actions
	+ draft documents
	+ user/student compliance
	+ user level reports
* EasyTRAC

  | * View
	+ all pages
* Edit
	+ all pages except Personal Demographics and Eligibility pages
* Create
	+ Draft IEP
	+ Draft progress report
	+ Projected Eligibility report
	+ Projected IEP report
	+ Caseload Reports
* ***If*** IEP team member, can edit Alternate Assessment page
* ***If*** IEP Team Member, create Reeval Related Service Obsv and Medical Reeval Document
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| **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.  | * **Students at own schools**
* IEP team member
* Restraint and isolation entry
* Access process wizard
* Upload external documents
* View
	+ user actions
	+ draft documents
	+ school/user/student compliance
* EasyTRAC
 | * View
	+ all pages
	+ all documents
* Edit
	+ all pages except Personal Demographics and Eligibility Process
* Create
	+ draft IEP
	+ draft progress report
	+ Restraint and Isolation report for state reporting
	+ all local and miscellaneous reports for own schools
	+ ECO Date Report
* ***If*** IEP team member, can edit Alternate Assessment page
* Can be a Section 504 Team Member
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **School Counselor** | 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 Special Education Teachers, Behavior Specialists, or 504 Administrators. This may be an employee of the district.  | * **Students at own schools**
* IEP team member
* 504 team member
* Restraint and isolation entry
* Access process wizard
* Upload external documents
* View
	+ user actions
	+ draft documents
	+ school/user/student compliance
* EasyTRAC
 | * View
	+ all pages
	+ all documents
* Edit
	+ all pages in Eligibility Process, IEP Process and 504 Process
* Create
	+ draft IEP
	+ draft progress report
	+ all local and miscellaneous reports for own schools
	+ ECO Date Report
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **General Education Teacher** | Assists with implementing and carrying-out plans for students with disabilities, often focusing on classroom accommodations 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 General Education Teachers. This may be an employee of the district.  | * **Students at own schools**
* IEP team member
* 504 team member
* Restraint and isolation entry
* Access process wizard
* Upload external documents
* View
	+ user actions
	+ draft documents
	+ school/user/student compliance
* EasyTRAC
 | * View
	+ all pages
	+ all documents
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **School/District Lead** **(Admin Support Edit)** | 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. This user type may include a District-wide Supervisor, Lead Special Education Teacher, or Department Chair.  | * **Students at own schools**
* All grades
* IEP team member
* Case manager
* Assign
	+ team members
	+ case manager
	+ next school
* Restraint and isolation entry
* Access process wizard
* Upload external documents
* View
	+ user actions
	+ school/user/student compliance
	+ school level and user level reports
* Add/edit compliance alerts
* EasyTRAC
 | * View
	+ all pages
* Edit
	+ all pages except Personal Demographics
	+ Eligibility Referral,
	+ Eligibility Determination
* Create
	+ all documents except Eligibility
		- Can create Draft Eligibility
	+ all local and miscellaneous reports
	+ draft and final Re-Evaluation documents
	+ ECO Date Report
* ***If*** case manager ***or*** IEP team member, can edit Alternate Assessment page
* Can be a Section 504 Team Member
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **Special Educator** **(Teacher Edit)** | 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. | * **Own student caseload**
* Case manager
* IEP team member
* Assign team members
* Upload external documents
* View
	+ user actions
	+ draft documents
	+ school/user/student compliance
	+ school level reports
* EasyTRAC
 | * View
	+ all pages
* Edit
	+ all pages except Personal Demographics and Eligibility pages
	+ Eligibility Referral
	+ Eligibility Determination
	+ Draft Eligibility and SLD
* Create
	+ IEP Documents
	+ Final Evaluation Documents
	+ Final Re-evaluation documents
	+ Proj. IEP and Proj. Elig Report
	+ IEP Services with Location Report
* ***If*** case manager ***or*** IEP team member, can edit Alternate Assessment page
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **External School System Team Member** | Responsible for meeting the needs of students that come to their school from another district. 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. | * **Own student caseload**
* Case manager
* IEP team member
* Assign team members
* Upload external documents
* View
	+ user actions
	+ draft documents
	+ school/user/student compliance
	+ school level reports
* EasyTRAC
 | * View
	+ all pages
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| **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. | * **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
 | * View
	+ all pages
	+ all documents
* Create
	+ Letters
	+ draft documents
	+ Local and Misc. Reports
* Edit Contacts page
* Create Draft Progress Reports
* Run
	+ All Student Export SPED Only XLS report
	+ IEP Services with minutes report
	+ Active Student List
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| **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.  | * **Students at own schools**
* IEP team member
* Restraint and Isolation entry
* View
	+ draft documents
	+ school/user/student compliance
	+ school level reports
 | * View
	+ all pages
	+ all documents
* Create
	+ Restraint and Isolation Document
	+ all local and miscellaneous reports
* Can be a Section 504 Team Member
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **Outside Provider/****Contracted Providers**  | 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. | * **Own student caseload**
* IEP team member required
* EasyTRAC

For Contract Facilities that provide a service to the district such as billing or Medicaid reimbursement, they will have the user type of Outside Provider/Contracted Providers or School Staff. Districts will be required to manage their users’ access and make sure they all have the appropriate user type. | * View
	+ only Goals, Accommodations and Services pages
	+ draft/final IEP document
	+ draft/final progress report
* Create
	+ draft progress report
	+ Projected Eligibility and Projected IEP Report
	+ Caseload Reports

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 Educator or Related Service Provider user type. This will give providers access to their own caseload and edit access to all pages. |
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **IT USER** | 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. | * **Any student**
 | * View
	+ students’ Personal page
	+ Import Summary Data
	+ Import History
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **Record Specialist** | Recommended for staff who input student demographic data and review student’s personal page | * **Any student**
 | * View
	+ students’ Personal page
* Edit
	+ Make student inactive
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **IEP Team Member No Login**  | 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. The user would be allowed to be seen in the dropdown, but would not have access to any student records.  | * No Login
 | * No Login
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **No Login**  | 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.  | * No Login
 | * No Login
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| **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. | * **Access to all students**
* Assign 504 Committee Members
* Can be 504 Committee Member
* Manage inactive students
* Upload external documents
* View school/user/student compliance
 | * View
	+ Personal page
	+ Student History page
* Edit
	+ all 504 pages
	+ Contacts page
* Create
	+ all 504 documents
	+ all 504 reports
* Access inactive students
* Manage other 504 users
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| **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. | * **Access to students at own schools**
* Assign 504 Committee Members
* Can be 504 Committee Member
* Upload External Documents
 | * View
	+ Personal page
* Edit
	+ all 504 pages
	+ Contacts page
* Create
	+ all 504 documents
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| **User Type** | **User Definition** | **Student Record Access** | **Page Access** |
| **504 Service Provider** | These individuals will be responsible for providing the 504 Services. These users can access the entire 504 process. They are required to provide therapy to help students meet their 504 goals. This user type may include OTs, PTs, COTAs, PTAs, Speech teachers, and Hearing/Vision Specialists. This may be an employee of the district  | * **Own student caseload**
* 504 team member required
 | * View
	+ Personal page
	+ 504 Services page
* Edit
	+ all 504 pages
	+ Contacts page
* Create
	+ all 504 documents
 |
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