

# Process Alerts

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# Preferences (Special Ed)

[Special Education Preferences](#) | [Setting Special Education Preferences](#)

**PATH:** *System Administration > Special Education > Preferences*

Special education preferences are separate from overall System Preferences. Special Education preferences need to be created to send process alert messages and assign rules.

Image 1: Special Education Preferences

## Special Education Preferences

Preference	Description	Options
<b>Use School Scope Advisors/Service Providers/SPED Staff</b>	Selection indicates only special education providers from the selected school/district are used. If set to No, any service provider from any agency is used.	Yes or No
<b>Enable Team Member List to Populate Classroom Teachers</b>	Selection indicates classroom teachers are populated from the Team Member list.	Yes or No

<b>Days Between a Locked Evaluation and a New Locked IEP Starting</b>	Enter the number days for the district. This option is used in the Process Alerts process.	School Days or Calendar Days
<b>Days Between a Locked Evaluation Consent Date and Evaluation Date</b>	Enter the number of days for the district. This option is used in the Process Alerts process.	School Days or Calendar Days
<b>Days Between a Locked Evaluation Consent Date and Evaluation Determination Date</b>	Enter the number of days for the district. This is only applicable in states that record determination dates on evaluations. This option is used in the Process Alerts process.	School Days or Calendar Days

Calendar days include weekends and non-instructional days. School days only count days that are designated for instruction.

## Document Wizard Descriptions

This section of the Special Education Preferences was added in the [1246 Release Pack \(November 2012\)](#).

Text entered in the **Evaluation, Plan, Progress Report** or **Simple Form** fields displays when creating a new document on the student's [Documents](#) tab. The text in the image below is default text. Remove this text and retype to meet specific district needs. To restore the default text, click the **Restore Default Description** buttons for the appropriate area.

Summary   Team Members   **Documents**   Contact Log

**Create New Document Wizard**

Please select one of the following documents:

- ☐ **Create New Evaluation:**  
Initial Referral, Determination of Disability, Re-Evaluations and Notice of Evaluation
- ☐ **Create New Plan:**  
Goals and Objectives, Services, Accommodations, Transition, and Other Information
- ☐ **Create New Progress Report:**  
Report measurable progress against ongoing Plan Goals
- ☐ **Create New Simple Form:**  
Notices, checklists, and supplemental forms

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DOCUMENT SELECTED FOR CREATION: (no document selected)

Create Document   Cancel

Image 2: Text Display for Creating New Documents

Existing text will display unless a user removes this text or alters the text.

## Setting Special Education Preferences

1. Select either Yes or No from the dropdown list for the behavior of **School Scope** preference.
2. Select either Yes or No from the dropdown list for the **Classroom Teacher** population preference.
3. Enter a value for the following preferences and determine for each option if the value is for **School Days** or for **Calendar Days**.
  1. Days Between a Locked Evaluation and a New Locked IEP Starting
  2. Days Between a Locked Evaluation Consent Date and Evaluation Date
  3. Days Between a Locked Evaluation Consent Date and Evaluation Determination Date.
4. Enter the desired text for the description that displays for each type of document that can be created for a student.
5. Click the **Save** icon when finished. Special Education Preferences are now set.

# Process Alerts

[Process Alert Preferences](#) | [Available Tools](#)

**PATH:** *System Administration > Special Education > Process Alerts*

When active, process alerts are delivered to case managers to remind them of special education events that may require attention. Process alerts may be created for events such as:

- Important birthdays (3, 6, 18)
- Evaluation due dates
- Progress report due dates
- Expiring IEPs
- Time between receiving consent to evaluate student and completing/locking the evaluation
- Time between completing an evaluation and starting a new, locked IEP

Alerts are only sent for a student's most recent, locked plan or evaluation. Only students enrollments on the current day will be sent messages.

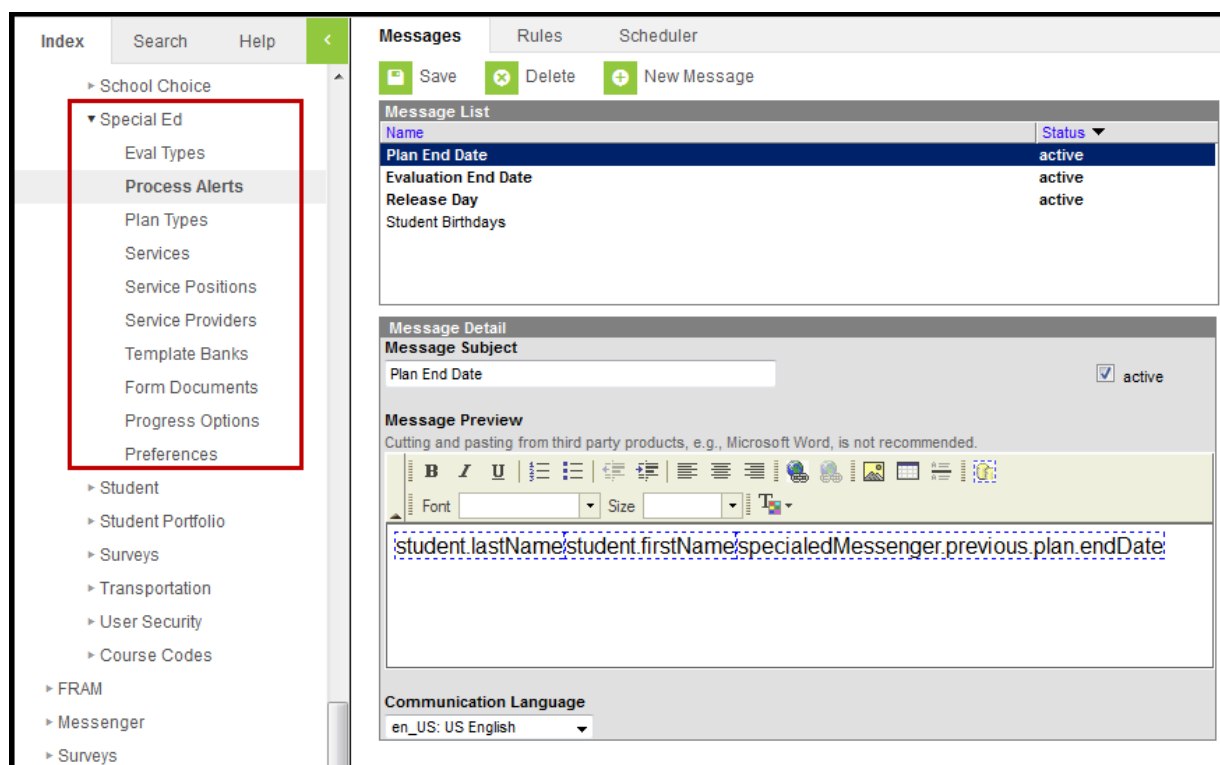


Image 1: Special Education Process Alerts

Process alerts are sent district-wide and are not specific to a school. Alerts are sent to active case managers of students who meet the alert criteria. Process alerts can only be sent to case managers and only used for special education purposes.

Process alerts can be sent via email. This requires [Messenger](#) to be configured for use.

## Process Alert Preferences

The following limits must be specific for the following options in Special Education Preferences:

- Days between a locked evaluation and a new locked IEP starting
- Days between a locked evaluation consent date and evaluation date
- Days between a locked evaluation consent date and evaluation determination date (only applicable in states that record determination dates on evaluations)

*Image 2: Special Education Preferences*

Days are counted as either **Calendar Days** or **School Days**.

- Calendar Days - all days are counted toward a maximum days allowed, including weekends and non-instructional days.
- School Days - only counts days designated for instruction.

## Available Tools

The following tools are available:

Tool	Description
<a href="#">Process Alert Messages</a>	Creates message templates to use when sending messages to case managers.
<a href="#">Process Alert Rules</a>	Determines when the messages are sent.
<a href="#">Process Alert Scheduler</a>	Creates scheduled tasks that deploy process alert message.

# Process Alert Messages

## [Creating a New Process Alert Message](#)

**PATH:** *System Administration > Special Education > Process Alerts > Messages*

Message templates are created in the Messages tab using the WYSIWYG editor. Message templates are required to determine rules and schedule alerts to be sent to special education case managers.

A message is only sent once per student, per rule. To send multiple notifications for the same alert, separate rules must be created (e.g., a rule to notify two weeks prior to an event and a separate rule to notify one week prior to an event).

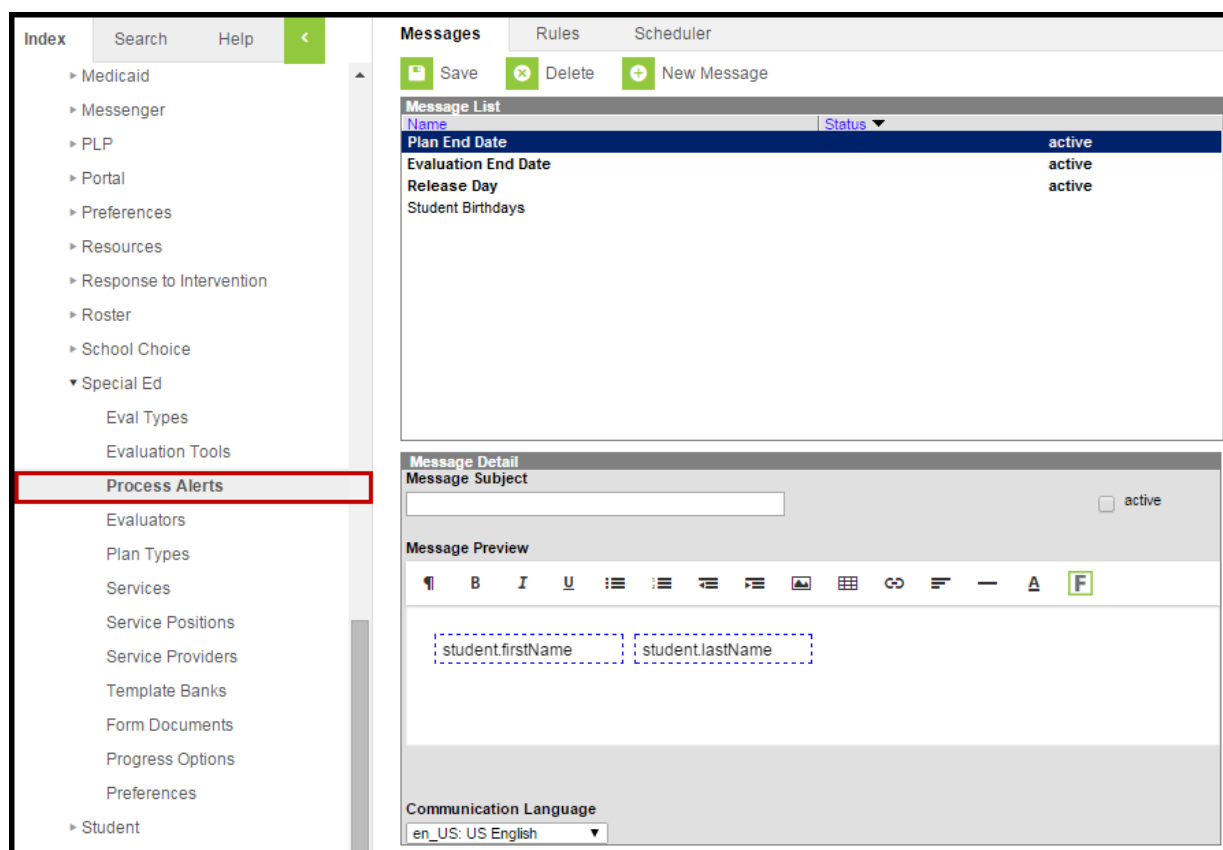


Image 1: Process Alerts - Messages

Infinite Campus recommends that process alert messages contain at least the fields that auto-insert a student's name, grade and school for identification purposes.

## Creating a New Process Alert Message

## 8 Process Alerts

1. Select the **New Message** icon. The **Message Detail Editor** will appear below.
2. Enter the subject of the message in the **Message Subject** field.
3. Enter the content of the message in the **Message Preview** field.
4. Select the **Insert/Edit Campus Field** icon to choose the desired Campus fields.
5. Select the **Communication Language**.
6. When finished, select the **Save** icon.

After the message has been created, establish [Rules](#) for the message.



# Process Alerts Rules

[Process Alerts Rules Editor](#) | [Creating Process Alerts](#) | [Creating Multiple Alerts for a Message](#) | [Examples of Process Alert Rules and Conditions](#)

**PATH:** *System Administration > Special Education > Process Alerts > Rules*

Process Alert rules determine when Process Alert messages are sent. Message templates must be created on the Messages tab before establishing rules.

If a message is to be sent more than once for the same alert, multiple rules must be established for the alert (e.g., a rule to notify two weeks prior to the event and a separate rule to notify one week prior to the event). A single message may be used by multiple rules.

Subject	Message	Created Date	Status
18th Birthday Rule	Student Birthdays	04/11/2014	active
6th Birthday Rules	Student Birthdays	04/11/2014	active
Plan End Date	Plan End Date	04/11/2014	active
Release Day Message	Release Day	04/11/2014	

<b>Rule Detail</b>	
<input checked="" type="checkbox"/> active	<b>*Rule Name</b> Plan End Date <b>*Associated Message Template</b> Plan End Date
<b>Special Conditions</b>	
Days Before/After Event Due	Event 1 and Event 2
30 Calendar Days Before	Plan End Date and
* The alert checks the above date. * The above is due.	

Image 1: Process Alerts Rules Editor

## Process Alerts Rules Editor

The following options are available.

### Rule Detail

Field	Description
<b>Active</b>	Selection indicates the rule is currently active.
<b>Rule Name</b>	Name of the rule.

<b>Associated Message Template</b>	Template from the <a href="#">Messages</a> tab assigned to the rule.
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### Special Conditions

Field	Description
<b>Days Before/After Event Due</b>	Number of days before or after when the message should be sent.
<b>Count Option</b>	Entered number above is based on either School Days or Calendar Days.
<b>Before/After Logic</b>	<p>If the message related to the rule is to be sent BEFORE an event, select the “Before” option.</p> <p>If the message is to be sent AFTER an event, select the “After” option.</p> <p>When After is selected, the message will be sent after the EXACT amount of specified days have passed. This means that if an event occurred 11 days prior to the start date of the scheduled alert and the message is set to send 10 days after the event, the case manager will NOT receive an alert for that event.</p>
<b>Event 1</b>	Selection indicates the event to which the before/after selection applies. See the list of <a href="#">Event Options</a> available.
<b>Event 2</b>	Selection indicates the event to which the before/after selection applies. See the list of <a href="#">Events Options</a> available.

## Event Options

The values for Event 2 are dependent on the Event 1 selection .

Event 1 Options	Event 2 Options
<b>Age 10 Birthday</b>	Not applicable
<b>Age 14 Birthday</b>	Not applicable
<b>Age 18 Birthday</b>	Not applicable
<b>Age 21 Birthday</b>	Not applicable
<b>Age 3 Birthday</b>	Not applicable
<b>Age 6 Birthday</b>	Not applicable
<b>Age 7 Birthday for Developmentally Delayed</b>	Not applicable
<b>Age 9 Birthday</b>	Not applicable
<b>Previous Evaluation + 3 years</b>	New Evaluation (3 year)

<b>Evaluation Consent Date</b>	<ul style="list-style-type: none"> <li>• Evaluation Date OR</li> <li>• Evaluation - Determination Date</li> </ul>
<b>Evaluation - Determination Date</b>	Not applicable
<b>Evaluation Date</b>	Plan Start Date
<b>Plan End Date</b>	Locked IEP Starting
<b>Plan Start Date</b>	Not applicable
<b>Progress Report Date</b>	Not applicable
<b>Term End Date</b>	Progress Report Due
<b>Today</b>	Not applicable

## Creating Process Alerts

### Rule Detail

1. Select the **New Rule** icon.
2. Mark the **Active** checkbox.
3. Enter the name of the rule in the **Rule Name** field.
4. Select the message template to which the rule should be applied. The message template must have been created on the [Messages](#) tab to appear in this list.

### Special Conditions

1. Enter the number of **Days Before/After Event Due**.
2. Select the option of whether to count by **School Days** or **Calendar Days**.
3. Select the **Before** or **After** option from the dropdown list.
4. Select the event for which this rule applies and the before/after logic is applied in the **Event 1** dropdown.
5. If applicable, select the event before which the message should be sent from the **Event 2** dropdown list. This dropdown list is populated based on the event selected from the Event 1 dropdown list.
6. When finished, select the **Save** icon.

After establishing rules, user the [Scheduler](#) tab to set when the messages should be sent.

If a message is to be sent more than once for the same alert, multiple rules must be established for the alert (e.g., a rule to notify two weeks prior to the event and a separate rule to notify one week prior to the event). A single message may be used by multiple rules.

## Creating Multiple Alerts for a Message

Multiple rules may be set to remind case managers of the same event. For example, if case managers can be reminded of upcoming triennial evaluation two weeks in advance and again one day in advance if the evaluation still has not been created.

Messenger Rule List			
Subject	Message	Created Date	Status
18th Birthday Rule	Student Birthdays	04/11/2014	active
6th Birthday Rules	Student Birthdays	04/11/2014	active
Plan End Date - Month	Plan End Date	04/11/2014	active
Plan End Date - Week	Plan End Date	04/11/2014	active
Release Day Message	Release Day	04/11/2014	

Image 2: Process Alerts Rules - Multiple Alerts

## Examples of Process Alert Rules and Conditions

The following is a list of sample rules that can be created.

### Age Rules

Rules may be set to remind case managers of students' upcoming birthdays (ages 3, 6 and 18) when the case manager is required to perform an action.

Rule Detail			
<input checked="" type="checkbox"/> active	*Rule Name 18th Birthday Rule	*Associated Message Template Student Birthdays ▼	
Special Conditions			
Days Before/After Event Due		Event 1	Event 2
2	Calendar Days ▼	Before ▼	Age 18 Birthday ▼
		and	▼
* The alert checks the above date.		* The above is due.	

Image 3: Birthday Rule

### Annual IEP Due

Rules may be set to remind case managers of expiring IEPs and indicate that a new locked IEP will be needed.

Rule Detail			
<input checked="" type="checkbox"/> active	<b>*Rule Name</b> Annual IEP Due	<b>*Associated Message Template</b> Annual IEP Due	
Special Conditions			
Days Before/After Event Due		Event 1	Event 2
10	Calendar Days	Before	Plan End Date
		and	Locked IEP Starting
		* The alert checks the above date.	* The above is due.

Image 4: New IEP Needed

## Exceeded Days

Rules may be set to remind case managers if they have exceeded a certain number of days between receiving consent to evaluate and evaluation determination, as necessary for completion of special education documents.

Rule Detail			
<input checked="" type="checkbox"/> active	<b>*Rule Name</b> Exceeded 14 days between consent and determinir	<b>*Associated Message Template</b> Exceeded Days	
Special Conditions			
Days Before/After Event Due		Event 1	Event 2
15	Calendar Days	After	Evaluation - Consent Date
		and	Evaluation - Determination Date
		* The alert checks the above date.	* The above is due.

Image 5: Exceeded Days

## Locked IEP

Rules may be set to remind special education case managers when a locked IEP will be due for a student (after an evaluation has been locked and saved).

Rule Detail			
<input checked="" type="checkbox"/> active	<b>*Rule Name</b> Locked IEP Due in 10 days	<b>*Associated Message Template</b> Locked IEP Due	
Special Conditions			
Days Before/After Event Due		Event 1	Event 2
10	Calendar Days	Before	Evaluation Date
		and	Plan Start Date
		* The alert checks the above date.	* The above is due.

Image 6: Locked IEP Needed

## Progress Report

Rules may be set to remind special education case managers when a progress report will be due for a student (as the term nears its end).

Rule Detail			
<input checked="" type="checkbox"/> active	<b>*Rule Name</b> Progress Report due in 7 days	<b>*Associated Message Template</b> Progress Report Due ▼	
<b>Special Conditions</b>			
<b>Days Before/After Event Due</b>		<b>Event 1</b>	<b>Event 2</b>
7	Calendar Days ▼	Before ▼	Term End Date ▼ and Progress Report Due ▼
		* The alert checks the above date.	* The above is due.

*Image 7: Progress Report*

## Evaluation Due

Rules may be set to remind special education case managers that an evaluation will be due for a student.

Rule Detail			
<input checked="" type="checkbox"/> active	<b>*Rule Name</b> Evaluation Due	<b>*Associated Message Template</b> Evaluation Due ▼	
<b>Special Conditions</b>			
<b>Days Before/After Event Due</b>		<b>Event 1</b>	<b>Event 2</b>
7	Calendar Days ▼	Before ▼	Previous Evaluation + 3 Years ▼ and New Evaluation (3 year) ▼
		* The alert checks the above date.	* The above is due.

*Image 8: Evaluation Due*

# Process Alerts Scheduler

[Process Alerts Scheduler Logic](#) | [Process Alerts Scheduler Editor](#) | [Scheduling an Alert](#)

**PATH:** *System Administration > Special Education > Process Alerts > Scheduler*

The Process Alerts Scheduler tool creates scheduled tasks that deploy process alert messages. The scheduler runs each active rule as often as specified by the **Recurring Frequency** field: when a rule is found valid for a student (based on the conditions specified on the Rules tab), an alert is sent to his/her case manager.

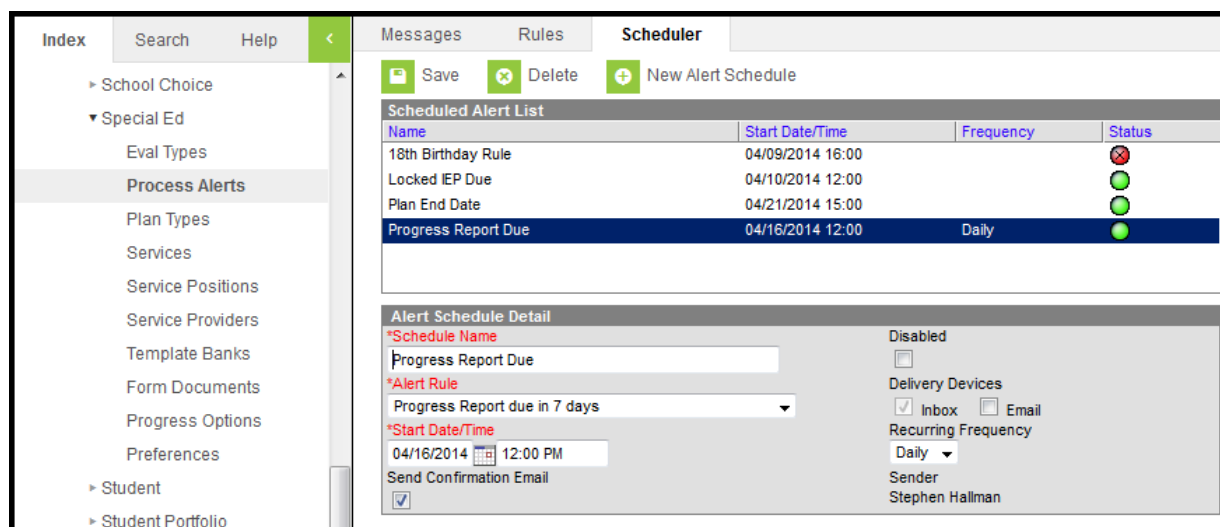


Image 1: Process Alerts - Scheduler

Alerts are only sent to a case manager once per rule, per student. The case manager will not receive multiple notifications for the same student's event more than one time unless multiple rules have been created and scheduled for that alert message.

## Process Alerts Scheduler Logic

Message templates and rules for process alerts must be created before scheduling and delivery can occur. For a process alert to be delivered to case managers, the following must be true:

- The applicable alert rule **MUST** have the Active checkbox marked on the [Rules](#) tab.
- The applicable alert scheduled task **CANNOT** have the Disable checkbox marked on the Schedule tool.

## Process Alerts Scheduler Editor

The following fields are available on the Alert Schedule Detail section.

Field	Description
<b>Schedule Name</b>	Name of the schedule being sent. This should be a name where all people who receive the message understand what it means.
<b>Alert Rule</b>	Selection indicates the rule applied to the scheduler message. This dropdown pulls the existing rules from the <a href="#">Rules</a> tab.
<b>Start Date/Time</b>	This is the date on which the scheduler will begin checking for valid conditions. The Start Date will not post as the posted date in the Process Inbox. Instead, the Process Inbox will see a Posted Date indicating the date the message was delivered. Dates are entered in <i>mmddyy</i> format or can be entered by selecting the calendar icon. Time is entered in <i>HH:MM</i> format.
<b>Disabled</b>	Indicates the message is not currently active.
<b>Delivery Devices</b>	Selection indicates how the message will be received: <ul style="list-style-type: none"> <li>• <b>Inbox</b> - This option cannot be unselected. Messages are automatically sent to the Process Inbox of case managers, provided that he/she has the Teacher Email Messenger Preference marked on the Demographics tab.</li> <li>• <b>Email</b> - Case managers will receive an email AND a Process Inbox alert. Email Messenger must be enable in the Campus XML and must be properly configured in the Messenger Email Preference.</li> </ul>
<b>Recurring Frequency</b>	Determines how often the message is sent.
<b>Send Confirmation Email</b>	When selected, a message will be sent to the administrator whose email is specified in the Sender Address field of the <a href="#">SMTP Email Preference</a> .
<b>Sender</b>	Indicates the person sending the message.

## Scheduling an Alert

1. Select the **New Alert Schedule** icon. The **Alert Schedule Detail Editor** will appear below.
2. Enter the name of the schedule in the **Schedule Name** field.
3. Select the **Alert Rule** of the message to be scheduled.
4. Enter the **Start Date**.
5. Enter the **Start Time** (e.g., 02:00 PM).
6. Mark the **Send Confirmation Email** if desired.
7. If the scheduled alert should be disabled, mark the **Disabled** checkbox.
8. Mark the appropriate **Delivery Devices**.



9. Select how often the scheduler should check for messages that meet the conditions set on the Rules tab in the **Recurring Frequency** field.
10. Click the **Save** icon.

When the Process Alerts Scheduler determines that the requirements for the message have been met, an alert will be sent to the case manager. Scheduled process alerts will also appear with all other system tasks in the [Task Scheduler](#).