SPECIAL ED PROCESS ALERTS

OVERVIEW

Special Education Process Alerts allow districts to define the amount of allowable time between events in the special education process and to set the threshold for notifications of events that are coming due to be sent to the case manager's process inbox. Process Alerts are sent district-wide and are not specific to a school. Only users assigned the role of a case manager will receive the alerts.

OBJECTIVES

At the conclusion of this lesson, you should be able to:
- Create a message template that will be sent as an alert.
- Set a rule and schedule for an alert.

Messages

After the preferences have been set, message templates can be created. These templates will then create the individualized messages that will be delivered to the case manager's Process Inbox.

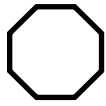*Path: System Administration > Special Ed > Process Alerts > Messages*
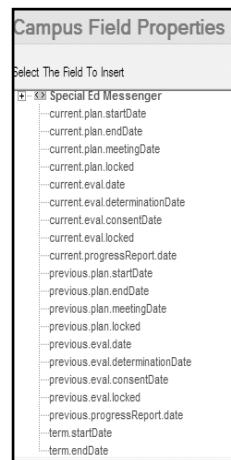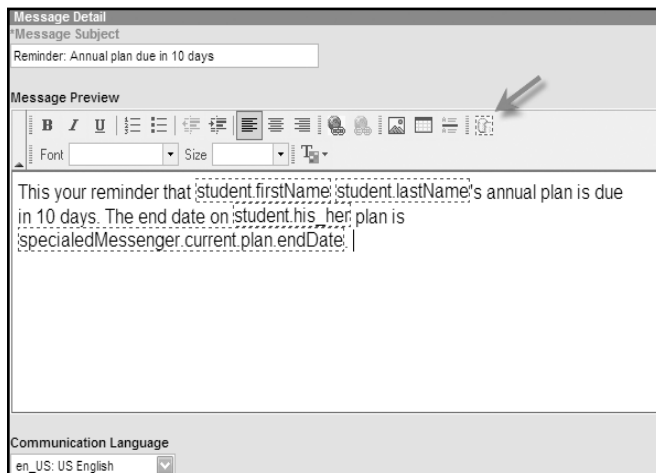
Each message should have a minimum of the student's name, grade and school so that the case manager can easily identify the student. It is also recommended that the message include time specific deadlines so that the recipient can avoid receiving subsequent messages. This can be done by entering Campus fields into the message template. Campus will then populate these fields with the appropriate student information when the message is sent.

1. Select New Message at the top of the tab to open the Message Detail editor.

2. Enter the subject of the message in the Message Subject field.

3. In the Message Preview field, the template can be created. Messages can be typed directly into the box using the options above the box or copied and pasted from another document.

4. Fields available for use, including Special Education fields, can be found by selecting Insert/Edit Campus Field. It is the blue dashed box on the far right side of the tool bar above the Message Preview field.

5. Select Save when finished.

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Campus
University

⬡ *When "After" is selected, the message will be sent after the exact amount of specified days have passed. 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.*

Rules

After the message templates have been created, rules need to be established regarding when the message will be sent. If a message should be sent multiple times to a case manager for the same student, and event, then multiple rules should be created for the alert.

Path: System Administration > Special Ed > Process Alerts > Rules

Messages	Rules	Scheduler			
☐ New Rule					
Messenger Rule List					
Subject			Message	Created Date	Status
10 Day warning for annual reveiw			Reminder: Annual plan due in 1...	05/04/2009	active
Age 18 2			18 bday alert	04/23/2009	active
Student turning age 18			18 bday alert	04/23/2009	active

1. Select New Rule at the top of the tab.

2. To make the rule active, check the Active checkbox in the Rule Detail editor. Do not check the box if the message should be saved for future use and should not be delivered.

3. Name the rule in the Rule Name field.

4. From the Associated Message Template dropdown list, select the message template that the rule will be aligned with.

5. Enter the number of days before/after the event due date in the Days Before /After Event Due field.

6. Select whether the days that should be counted are calendar days or school days from the dropdown list.

7. If the message should be sent before an event, select "Before"; if the message should be sent after an event, select "After".

8. Select the event to which the message relates to from the Event 1 dropdown list.

9. 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.

10. Select Save at the top of the tab when finished.

Rule Detail				
	*Rule Name			*Associated Message Template
☑ active	10 Day warning for annual reveiw			Reminder: Annual plan due in 10 days ▾
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.

Special Ed. Process Alerts

Scheduler
The Process Alerts Scheduler creates tasks that send process alert messages daily. When a rule is found to be valid for a student an alert is sent to his/her case manager. Only one message will be sent per student per event.

Path: System Administration > Special Ed > Process Alerts > Scheduler

Messages	Rules	Scheduler			
☐ New Alert Schedule					
Scheduled Alert List					
Name		Start Date/Time	Frequency	Status	
10 Day Warning		05/04/2009 08:00	Daily	○	
Age 18 2		04/23/2009 14:05		⊗	
birthday rule		04/23/2009 13:58	Daily	○	

Alerts that are active will have a green button in the Status column. Inactive alerts will have a red button.

1. Select New Alert Schedule at the top of the Scheduler tab.

2. In the Alert Schedule Detail editor give the schedule a name in the Schedule Name field.

3. Select the rule to be scheduled from the Alert Rule dropdown list.

4. Enter a Start Date in MMDDYYYY format or by selecting the calendar icon to choose a date. This will be the date that the scheduler will start checking for valid conditions.

5. Enter a Start Time that the message should be sent on the applicable date.

6. Check the Send Confirmation Email box if an email confirming the task's completion should be sent to an administrator whose email is specified in the Email Preferences of System Administration.

7. If the message should also be sent to the case manager via email, check the Email box under Delivery Devices. The Inbox option will send the message to the Case Manager's Process Inbox. If he/she has an email address and the Teacher Email Messenger Preference marked on Census > Demographics an email will also be sent. The Email Messenger must be properly configured in System Administration > Preferences > Messenger > Email Preferences for this to occur.

8. Select the Daily from the Recurring Frequency dropdown list.

9. If the scheduled alert should be disabled check the Disabled box.

10. Select Save at the top of the tab.

Alert Schedule Detail

Schedule Name	Disabled
10 Day Warning	☐
*Alert Rule	Delivery Devices
10 Day warning for annual reveiw ▾	☑ Inbox ☑ Email
*Start Date/Time	Recurring Frequency
05/04/2009 ▦ 08:00 AM	Daily ▾
Send Confirmation Email	Sender
☑	Admin Admin

PROCESS ALERT RULE EXAMPLES

Exceeded Days Rule

Rules may be set to remind special education case managers if they have exceeded a certain number of days between receiving consent to evaluate and the evaluation being completed.

The district will need to set the allowed number of days for this rule in System Administration > Special Ed Preferences.

District Special Education Preferences		
Use School Scope Advisors/Service Providers/SPED Staff	Yes	
Enable Team Member List to Populate from Classroom Teachers	Yes	
Days Between a Locked Evaluation and a New Locked IEP Starting	10	Calendar Days
Days Between a Locked Evaluation Consent Date and Evaluation Date	15	Calendar Days
Days Between a Locked Evaluation Consent Date and Evaluation Determination Date	20	Calendar Days

Sample Rule: In this example, the case manager will be notified that the time has been exceeded (15 days set in the special education preferences) to have a locked evaluation completed and as a result additional forms will need to be completed explaining why. The associated alert message should discuss the required documentation.

Rule Detail		
	*Rule Name	*Associated Message Template
☑ active	Exceeded 15 days between consent & eval	15 days exceeded between consent & locked eval

Special Conditions						
Days Before/After Event Due			Event 1		Event 2	
16	Calendar Days	After	Evaluation - Consent Date	and	Evaluation Date	
			* The alert checks the above date.		* The above is due.	

Exceeded Days Rule for Determination Dates
This version of the rule is only applicable in states that record determination dates on evaluations.

Rules may be set to remind special education 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 used to explain the delay.

The district will need to set the allowed number of days for this rule in System Administration > Special Ed Preferences.

District Special Education Preferences		
Use School Scope Advisors/Service Providers/SPED Staff	Yes	
Enable Team Member List to Populate from Classroom Teachers	Yes	
Days Between a Locked Evaluation and a New Locked IEP Starting	10	Calendar Days
Days Between a Locked Evaluation Consent Date and Evaluation Date	15	Calendar Days
Days Between a Locked Evaluation Consent Date and Evaluation Determination Date	20	Calendar Days

Sample Rule: In this example, the case manager will be notified that the time has been exceeded (20 days set in the special education preferences) to have a locked evaluation completed and as a result additional forms will need to be completed explaining why. The associated alert message should discuss the required documentation.

Rule Detail		
	*Rule Name	*Associated Message Template
☑ active	Exceeded 20 days between consent & determinat	Exceeded 20 days between consent & determinination

Special Conditions						
Days Before/After Event Due			Event 1		Event 2	
21	Calendar Days	After	Evaluation - Consent Date	and	Evaluation - Determination Date	
			* The alert checks the above date.		* The above is due.	

Locked IEP Rule

Rules may be set to remind case managers when a locked IEP is coming due after the evaluation has been locked and saved.

The district needs to set the allowed number of days for this rule in System Administration > Special Ed Preferences.

District Special Education Preferences		
Use School Scope Advisors/Service Providers/SPED Staff	Yes	
Enable Team Member List to Populate from Classroom Teachers	Yes	
Days Between a Locked Evaluation and a New Locked IEP Starting	10	Calendar Days
Days Between a Locked Evaluation Consent Date and Evaluation Date	15	Calendar Days
Days Between a Locked Evaluation Consent Date and Evaluation Determination Date	20	Calendar Days

Sample Rule: Case managers will be notified 6 days after the evaluation date but 4 calendar days before the deadline to lock the IEP (10 days set in the special education preferences).

Rule Detail		
	*Rule Name	*Associated Message Template
☑ active	4 Days Until IEP is Due	4 Days to go

Special Conditions				
Days Before/After Event Due			Event 1	Event 2
6	Calendar Days	After	Evaluation Date	and Plan Start Date
			* The alert checks the above date.	* The above is due.

Annual IEP Due Rule

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

Campus will look for a plan that is locked and a plan that is set to start the day after the previous plan ends. If there is an instance where there is no new locked plan the alert will be sent.

Sample Rule: Case managers will be notified 10 calendar days before the end date of the current IEP.

Rule Detail		
	*Rule Name	*Associated Message Template
☑ active	10 Day warning for annual reveiw	Reminder: Annual plan due in 10 days

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.

Three Year Evaluation Due Rule

Rules may be set to remind case managers of expiring evaluations and indicate that a new evaluation needs to be completed and locked.

Campus will look for an evaluation that is locked with a start date no more than three years minus one day after the previous evaluation

Sample Rule: Case managers will be notified 7 calendar days before the end date of the current 3 year evaluation.

Rule Detail			
☑ active	*Rule Name 3-Year Eval Due in 5 Days		*Associated Message Template 3yr - 1 day eval
Special Conditions			
Days Before/After Event Due		Event 1	Event 2
7	Calendar Days ▾ Before ▾	Previous Evaluation + 3 Years ▾ * The alert checks the above date.	and New Evaluation (3 year) ▾ * The above is due.

Progress Report Rule

Rules may be set to remind case managers of upcoming term end dates where a progress report has not been made for a student.

Campus will look for a progress report date that falls within the start and end dates of the current term.

Sample Rule: Case managers will be notified 5 calendar days before the end date of the current term where no progress report has been saved.

Rule Detail			
☑ active	*Rule Name 5 Days Before Progress Report is Due		*Associated Message Template 5 days before Progress Report due ▾
Special Conditions			
Days Before/After Event Due		Event 1	Event 2
5	Calendar Days ▾ Before ▾	Term End Date ▾ * The alert checks the above date.	and Progress Report Due ▾ * The above is due.

Age Rule

Rules may be set to remind case managers of students' upcoming birthday, especially at ages 3, 6 and 18 when action is required.

Campus will look for students' birthdates that are reaching 3, 6 or 18 years. There will need to be a rule for each year (3, 6 and 18).

Sample Rule: Case managers will be reminded 5 calendar days before a student's 18th birthday (as the student should be notified of his/her transfer of rights).

Rule Detail		
	*Rule Name	*Associated Message Template
☑ active	5 Days Before Age 18	18 bday alert ▼

Special Conditions			
Days Before/After Event Due		Event 1	Event 2
5	Calendar Days ▼	Before ▼	Age 18 Birthday ▼	and ▼
			* The alert checks the above date.	* The above is due.