eSchoolPLUS State Reporting Integration - Ohio

Overview

The SameGoal/eSchoolPLUS Flags and State Reporting integration allows districts to transfer key information from documents authored in SameGoal back into eSchoolPlus. This includes:

- **Alerts** - Communicate student participation in special education to general education staff.
- **EMIS screens** - Transfer select data elements from documents authored in SameGoal into eSchoolPLUS, allowing the district to perform state reporting within eSchoolPLUS.

Integration

Integrated alerts and EMIS screens:

- Disability Medical Alert
- Special Education Alert
- EMIS Special Ed
- EMIS Programs

Resources:

- Go Live Checklist
- Configure Integration

Disability Medical Alert

The data entry screen for the disability medical alert in eSchoolPLUS can be found by searching for a given student, then visiting **Menu > Emergency**. A medical alert (triangle with an M) appears in the top right of eSchoolPLUS screens for a given student when that student has an active disability record (today is between the record **Start Date** and **End Date**). When clicked, this alert displays the disability of the active disability record.

This integration performs the following:

- **A disability record is added** for each complete ETR in SameGoal that does not have outcome ETNE or ETEX with:
  - Start Date = MEETING DATE (cover)
  - End Date = MEETING DATE (cover) + 3 years - 1 day
  - Disability = "The child is eligible for special education and related services in the category of:" (section 4)
- **A disability record is end-dated** if:
  - A subsequent (MEETING DATE > last ETR Meeting Date) complete ETR in SameGoal has outcome ETEX. End Date = MEETING DATE for ETR with ETEX - 1 day.
  - A subsequent (MEETING DATE > last ETR Meeting Date) complete IEP in SameGoal has a CIEP event. End Date = CIEP date - 1 day.
- **A disability record is removed** if the record Start Date is greater than (past) the integration cutover date, but a corresponding complete ETR is not found in SameGoal.

Fields included in integration: Priority (always 1), Start Date, End Date, Disability Code & Description

Special Education Alert

The data entry screen for the special education alert in eSchoolPLUS can be found by searching for a given student, then visiting **Menu > Personal**. A special education alert (triangle with an S) appears in the top right of eSchoolPLUS screens for a given student when the IEP checkbox is checked under **Educational Factors**. When clicked, this alert displays "Student has an IEP".

This integration performs the following:

- **Sets the IEP checkbox** checked when there is an active (today is within the effective start and end dates), complete IEP or SP in SameGoal.
    - IEP = checked
    - IEP Status = "SE - Special Education"
- Sets the **IEP checkbox unchecked** and IEP Status blank if any of the following are found in SameGoal:
    - Complete IEP (meeting date on or after today) with outcome IEPR
    - Complete ETR (meeting date on or after today) with outcome ETEX
    - CIEP event (CIEP date on or after today) on complete IEP
- Sets the **IEP checkbox unchecked** and IEP Status blank if either the IEP checkbox is set checked or IEP Status is not blank but there is no active, complete IEP in SameGoal.

Fields included in integration: IEP checkbox, IEP Status

EMIS Special Ed

The data entry screen for special education state reporting in eSchoolPLUS can be found by searching for a given student, then visiting **Menu > EMIS Special Ed**. This screen captures information related to the following EMIS records:

- GE Record: Student Special Education Record
- FE Record: Student Special Education Graduation Requirement Record

An EMIS crosswalk for where data elements for each EMIS record are found in Ohio forms can be found in our online support guides. This integration performs the following:

For each complete ETR in SameGoal:

- A record is added if Preschool Transition Conference Date is filled:
  - Date Indicator: **PSTC**
  - Date: Preschool Transition Conference Date (cover)
- A record is added if Referral Date is filled:
  - Date Indicator: **RFRL**
  - Date: REFERRAL DATE (cover)
- A record is added if Consent Date is filled:
  - Date Indicator: **CSNT**
  - Date: DATE PARENTS CONSENT RECEIVED (cover)
- A record is added for each **IETR**, **RETR** or **TETR**:
  - Date Indicator:
    - IETR if TYPE OF EVALUATION - INITIAL EVALUATION (cover) is selected
    - RETR if TYPE OF EVALUATION - REEVALUATION (cover) is selected
    - TETR if Date adopted WITHOUT modification (cover) is filled
  - Date:
    - DATE OF MEETING (cover) if IETR or RETR
    - Date adopted WITHOUT modification (cover) if TETR
  - Outcome`: "The child is eligible for special education and related services in the category of:" (section 4)
  - Non Compliance Id:
    - NON COMPLIANCE (cover) if IETR or RETR
    - Not Applicable if TETR

    - Outcome Beginning Date:
        - Blank if IETR or RETR
        - Date adopted WITHOUT modification (cover) if TETR
    - Outcome End Date:
        - Blank if IETR or RETR
        - Three years minus one day from DATE OF MEETING (cover) if TETR

For each complete IEP in SameGoal:

- A record is added for each **IIEP**, **RIEP** or **TIEP**:
    - Date Indicator:
        - IIEP if MEETING TYPE - INITIAL IEP (cover) is checked
        - RIEP if MEETING TYPE - ANNUAL REVIEW (cover) is checked
        - TIEP if Transfer IEP (TIEP) Date (cover) is filled
    - Date:
        - MEETING DATE (cover) if IIEP or RIEP
        - Date adopted WITHOUT modification (cover) if TIEP
    - Outcome: Outcome (section 11)
    - Non Compliance Id: NON COMPLIANCE (cover)
    - Outcome Beginning Date:
        - If IIEP or RIEP, MEETING DATE (cover) if outcome is IENS, IEPR, IEDP, otherwise START (cover)
        - Date adopted WITHOUT modification if TIEP
    - Outcome End Date:
        - If IIEP or RIEP, MEETING DATE (cover) if outcome is IENS, IEPR, IEDP, otherwise END (cover)
        - END (cover) if TIEP
    - IEP Test Type:
        - ALT when "Is the child participating in the Alternate Assessment for Students with Significant Cognitive Disabilities (AASCD)?" (section 12) is "Yes"
        - STA when "Will the child participate in district wide and state wide assessments with accommodations?" (section 12) is "Yes"
        - "***" when outcome is IENS, IEPR, IEDP (section 11)
        - STR by default
    - Secondary Planning: Secondary Planning (section 5)
    - C, M, R, W, S: Checked according to "The child is excused from the consequences of not passing the OGT in the following subjects" (section 12)

    - HIST, PHYS, ELA1, ELA2, ALG1, GEOM, MTH1, MTH2, BIOL, GOVM: Checked according to "The child is excused from the consequences of not passing End of Course (EOC) assessments in the following subjects:" (section 12)

For each complete SP in SameGoal:

- A record is added for each **IISP** or **RISP**:
    - Date Indicator:
        - IISP if MEETING TYPE - INITIAL SP (cover) is checked
        - RISP if MEETING TYPE - ANNUAL REVIEW (cover) is checked
    - Date: MEETING DATE (cover)
    - Outcome: IE39
    - Non Compliance Id: NON COMPLIANCE (cover)
    - Outcome Beginning Date: MEETING DATE (cover) if outcome is IENS, IEPR, IEDP, otherwise START (cover)
    - Outcome End Date: MEETING DATE (cover) if outcome is IENS, IEPR, IEDP, otherwise END (cover)
    - IEP Test Type:
        - ALT when "Is the child participating in the Alternate Assessment for Students with Significant Cognitive Disabilities (AASCD)?" (section 3) is "Yes"
        - STA when "Will the child participate in district wide and state wide assessments with accommodations?" (section 3) is "Yes"
        - "***" when outcome is IENS, IEPR, IEDP
        - STR by default
    - Secondary Planning: "****"
    - C, M, R, W, S: Checked according to "The child is excused from the consequences of not passing the required graduation tests in the following subjects" (section 4)
    - HIST, PHYS, ELA1, ELA2, ALG1, GEOM, MTH1, MTH2, BIOL, GOVM: Checked according to "The child is excused from the consequences of not passing the required graduation tests in the following subjects" (section 4)

For each completed Manifestation Determination Review in SameGoal:

- A record is added if "Student has accumulated more than 10 days... event should be reported to EMIS" is "Yes":
    - Date Indicator: **SEMD**
    - Date: DATE OF MANIFESTATION DETERMINATION REVIEW

Any EMIS Special Ed record that has a Date greater than or equal to the integration cutover date and does not correspond with an event found in SameGoal for a complete document is removed.

Fields included in integration: All fields

EMIS Programs

The data entry screen for EMIS programs in eSchoolPLUS can be found by searching for a given student, then visiting **Menu > EMIS Programs**. This screen captures information related to the EMIS GQ Record: Student Program Record.

This integration performs the following:

- **A record is added** for each related service of a complete IEP or SP in SameGoal (in sections 7 and 2 respectively):
    - Start Date: BEGIN
    - EMIS Program: TYPE OF SERVICE dropdown
    - Provider IRN: Provider IRN if programs is 211001 or 220100, else blank
    - End Date: END
- **A record is removed** if the record Start Date is greater than (past) the integration cutover date, but a corresponding related service on a complete IEP or SP is not found in SameGoal.

Fields included in integration: Start Date, EMIS Program, Provider IRN, End Date

Go Live Checklist

Every district has a different set of pre-existing processes and procedures for handling special education documents prior to automating information flow from SameGoal to eSchoolPLUS. Some important considerations include:

1. **Choose an integration "cutover" date.** This cutover date is used by the integration to only include documents with meeting dates on or after this date.
    - Any documents with a meeting date before the cutover date must still be manually entered as you begin the integration.
    - ETRs collect referral and consent dates which often pre-date an ETR's meeting date. Any referral and consent dates prior to the cutover date must be manually entered (this will drop off naturally after around two months due to compliance timelines).
    - IEPs that have original meeting dates prior to the integration date, but an amendment after the cutover date will only integrate AIEP events which occur after the integration date.
2. **Ensure SameGoal will be the "owner" (canonical source of information) for all data elements in eSchoolPLUS included in the integration after the chosen "cutover" date.** Because the main objective of this integration is to sync eSchoolPLUS nightly to reflect the data in SameGoal, the integration must necessarily remove data records in eSchoolPLUS not represented in SameGoal after the cutover date.
    - If your district has any processes for entering special education information into eSchoolPLUS in the areas of eSchoolPLUS described in this integration, these processes MUST be moved within SameGoal. For example, if EMIS information for out of district students is currently entered directly into eSchoolPLUS, this information must be entered into a "stub" document in SameGoal going forward after the cutover date and allowed to flow across.
    - A "stub" document that only contains minimal information required for state reporting information may be used by:
        - Creating a full new ETR, IEP or SP.
        - Checking the **State reporting information only** checkbox in the top right of the Cover Page.
        - Entering a **Reason** (eg "Out of district" for this case).
        - Entering only information required for state reporting (visit the **Check** tab to verify required information has been added).

        - Marking this document complete.

3. **Ensure document validation checks are enabled in SameGoal.** These checks are used to ensure the information flowing into eSchoolPLUS is complete and valid from eSchoolPLUS' perspective. Only completed documents which pass document validation checks are included in the integration.

4. **Ensure staff mark documents complete.** Only documents marked complete in SameGoal are integrated back into eSchoolPLUS. Documents that have either never been marked complete or were complete at one time but are now undergoing changes are ignored, as the information is not considered final. This workflow process works to ensure there is no "drift" between eSchoolPLUS and SameGoal, in which a document in SameGoal might have different information than the corresponding records in eSchoolPLUS (and because there is some information rather than none, this issue is more difficult to notice and correct). All state reporting, alert and document viewer integrations with student information systems from SameGoal only include complete documents.

    - When a meeting is completed, staff should mark the corresponding document complete as soon as possible.
    - When a document correction must be made by re-marking a document incomplete, staff should make the required correction then re-mark complete as soon as possible. Because the integration runs once daily, staff generally have a large window of hours to make corrections and re-complete documents as needed prior to a daily integration run.
    - When IEPs are amended, the original IEP (and any prior amendments) continue to be included in the integration. When the most recent amendment is finished and the document is re-marked complete, the records for the most recent amendment will be included in the integration as well.

5. **Review EMIS programs in eSchoolPLUS.** 215XXX codes for related services are not included in eSchoolPLUS by default. If your district wishes to include these in the integration, these options must be added to the dropdown in eSchoolPLUS with values equal to each 215XXX code.

Configure Integration

Create SameGoal account in eSchoolPLUS

Create a user account and configure the "eschoolPLUS Version" widget on the "Home" screen.

- Create a user account for this integration to use. Log in as this user.
- On the "Home" screen, click the gray circle with a down arrow in the top right. Select "Enable Edit".
- Click the plus sign in a yellow "Row". Select "Add a Widget".
- A dialog will appear. Choose "Version" in the left menu, then click "OK".
- Click the gray circle with a down arrow again. Select "Save Layout".
- A new widget should appear on the "Home" screen named "eschoolPLUS Version". The integration will terminate if this widget is not installed.

Configure SameGoal integration information

Visit **Settings > District Information > Details tab** in SameGoal using an administrative account. Scroll down to find eSchoolPLUS, and click the **add Integration information** button if an eSchoolPLUS screen is not already displayed. Complete the following fields under the horizontal line in the eSchoolPLUS configuration section:

- **Login URL** - Must start with "https://" and end in "eschoolplus" (e.g. https://applegrove.org/eschoolplus)
- **Username** - SameGoal web application account username.
- **Password** - SameGoal web application account password.
- **Database** - eSchoolPLUS database to write to.
- **School Year** - eSchoolPLUS school year to write to. Optional; when left blank, defaults to school year option with label "current year".
- **Include** - Integrations which may be enabled:
    - **Document alerts** - Check if you are also implementing the document viewer integration.
    - **State reporting writeback** - Check for this integration.
- **Advanced writeback options** - These options are not used by most districts:

    - **Include 215XXX programs** - Check to include 215XXX programs from IEP and SP related services in the integration. This will only work if 215XXX codes have been entered as options in your eSchoolPLUS instance on the "EMIS Programs" page. 215XXX program codes are no longer included in the EMIS GQ record. Programs "220100" and "211001" are, and are therefore included in the integration by default.
    - **Cumulative program records** - This should ONLY be checked for districts that began this integration using eSchoolPLUS version 3. Checking this option in other cases may cause data loss.
    - **Omit Personal page writeback** - This integration updates the eschoolPLUS "Personal" page by default. Only check if your district uses a different, custom-rolled process for updating this page.
- **Writeback cutover date** - **WARNING!** Entering the incorrect date in this field may cause data loss. This is the date on and after which the integration will assume all documents with this start date onward are the canonical source of special education information. If a record is entered manually in eSchoolPLUS after this date, it will be removed or updated to match document information entered in SameGoal.
    - Generally, this date is in the future, so your district can alert staff ahead of time that as of X, all documents with X start date will flow over to eSchoolPLUS automatically.
    - If you choose a date in the past, be sure you have reviewed your workflow process in eSchoolPLUS adequately to ensure no records were entered manually after this date that are not entered in SameGoal (eg out of district documents, transfers, etc).

Testing and Go Live

If your district wishes to run the integration in a SANDBOX prior to switching the integration live:

- Enter all configuration information above. Set **database** to the SANDBOX database value and set a preliminary "cutover" date to test with as **writeback cutover date**.
- When your district is ready to go live, update the configuration information. Set **database** to the PRODUCTION database value and update the **writeback cutover date** (if needed).