***Instructions for Accessing IEP Direct for Annual Review***

***Basic Access:***

1. wwwiepdirect.com - takes you to the sign-in page.
2. Click on “Customer Login” – takes you to Customer Login
3. Provide District ID, User ID, and Password. Remember that the password **must** be typed as follows: “ALLABOUTkids” – followed by a number. No spaces.
4. Click on “Login” – this will take you to the district’s IEP Direct program.
5. Click on “My Students” – upper left hand corner under the IEPDirect logo – this will bring up that district’s entire CPSE and CSE population.
6. Left upper corner: Check for the correct school year, choose either CPSE or CSE from the drop down menu for “View”.
7. Find your child’s name. To the left of the child’s name will be a series of small boxes.
   1. A black box indicates a finalized IEP – the one you need to use for progress marks for your Quarterly Review reports.
   2. A blue box indicates the child’s draft IEP. This is the one you need for Annual Reviews. Click on the blue box.
   3. This will take you directly to the child’s draft IEP.
8. On the right of the screen, along any of the orange bars you will see several small icons. The one to the far right is an icon of a file folder. Click on that icon.
9. You now see a “Subject Index” box – listing alphabetically all the sections of the IEP.

***SPAM Section***

1. **For updating SPAM, you will have to access each of the four sections separately. They are:**
   1. Academic Achievement
   2. Management Needs
   3. Physical Development
   4. Social Development
2. The following instructions apply to each of the four sections listed above.
3. Click on “Academic Achievement” (or any of the others)
4. On the right hand side of the orange bar, click on the icon of a pencil. It is the middle icon.
5. This will now let you edit each of the sections. Remember to address both strengths and areas of need. The areas of need will generate your goals.
6. Remember to save each revision.

***Evaluation/Reports Information Section*** *and* ***Standard Testing Section***

1. **Results of your evaluation need to be placed in two areas of the child’s IEP:**
   1. **Evaluations/Reports Information**
   2. **Standardized Testing**
2. To access either of these sections, click on the file folder icon (on orange bar on right)
3. This will take you back to the “Subject Index” box. Click on the Evaluation/Reports Information.
4. Click on the pencil icon, the middle icon on the right side of the orange bar.
5. This will take you to the Evaluation/Report section and will allow you to add your new testing information. Click on “Import”, on the right side of this screen.
6. Click on “Add” on the lower section of the screen.
7. Input “Date”, “Evaluation/Report (from the drop down menu), and “Examiner” (***All About Kids*** or ***Mid Island Therapy*** if AAK is not listed).
8. Click on “Save” to add new testing information, or on “Save and Return” to save and close out of this section. This will take you back to the Evaluation/Report screen where your information should now be displayed. Click on “Import” on the bottom of that screen.

1. You should now be back to the child’s draft IEP document. Go back to the “file folder” icon (right hand side of the orange line). The “Subject Index” will return. Click on “Standardized Test Results”.
2. **You are now ready to input all your standardized test findings.**
3. Click on the pencil icon (right hand side, middle icon)
4. Click on “Import” (right hand side, top bar)
5. Click on “Add” (center bottom of screen)
6. On this screen, enter “Test Date”, “Standardized Test (from the drop down menu), and Examiner (***All About Kids*** or ***Mid Island Therapy***, if AAK is not displayed).
7. Click on “Add (right side of screen, half-way down)
8. This will now allow you to access all the subtests of your assessment tool.
9. Complete all appropriate fields for every subtest. Click “Add”.
10. Your information for that test should now appear on the screen.
11. If you need to add more testing information, click “ADD” (lower section of screen).
12. If you are done and want to exit this section, click on “Import” (lower section of screen).

***Preschool Outcome Summary Section***

1. **Preschool Outcome Summary**
   1. **Is required for every child transition to kindergarten, even if being declassified.**
   2. **Is required for every child being declassified at this Annual Review meeting.**
2. To access Preschool Outcome Summary, you need to locate the “State Form” tab on the second to top line on the child’s draft IEP document. This will lead you to a drop down menu. Choose “Preschool Outcome Summary”.
3. There are three sections to this form. **Every section must be completed in the “EXIT INFORMATION” section**. This is a simple and straight forward task.
   1. Positive Social-Emotional Skills.
      1. **Source of Information**: Generally the “***Social/Emotional”*** section of the PES.
      2. **Date:**  The date you gave the test.
      3. **Summary of Results:** One or two sentences to the effect that his skills are within normal range, or that he continues to struggle with -------.
   2. Acquiring and Using Knowledge
      1. Same as above.
      2. Use the “***Cognitive Thinking***” section of the PES, unless a psychological evaluation has been completed.
      3. Use ***“Expressive Language Skills***” of the PES and all updated Speech/Language testing if completed.
   3. Use of Appropriate Behaviors to Meet Their Needs
      1. Same as the others.
      2. Here you should use the ***“Large Muscle Skills”*** and “***Small Muscle Skills”*** sections of the PES as well as the “***Self-Help Skills”*** section.

***Measurable Annual Goals***

1. **Measurable Annual Goals:** Go back to step #17 if you’ve forgotten how to access the “Subject Index”. This time click on “***Measurable Annual Goals”***.
2. Click on the pencil icon (orange bar on right, middle icon)
3. Click on “Save, add More Goals”. This will take you to a listing of goal domains.
4. Click on the desired goal (i.e., Speech/Language, Study Skills).
5. Do not use “Custom Goal, how many” unless you are adding very specific goals that are not found in the goal bank for your domain.
6. Find the goal you want, click on the white circle to the left. Click on “Continue”.
7. Choose the objectives you want for each goal. (Think of “objectives” as “benchmarks”. Only use the number of objectives you need for an annual report. If it is for a new 10-month IEP, you should use three objectives for each goal.) Now, click on “Continue”.
8. You will now be led through the steps to complete goals and objectives. Every drop down menu **must** be completed. Criteria is generally 85%. Criteria Period is generally “over 4 weeks”. Method provides you with many choices. Schedule is “Quarterly”
9. To continue to add more goals, click on “Save and add more goals”
10. When you are done with your goals and objectives, click on “Save”.