

MyEd Handout for Case Managers

NOTE: Always be in Student Services view to work on your IEPs

Getting Started

Plan Status and Dates

The Plan Status is determined by the start and end dates of the plan.

A *Plan Alert is triggered by an ACTIVE plan status.

- *Active -> Current. The plan you are following for the day to day support of the student*
- *Draft -> Future. A plan that you are preparing for a future implementation*
- *Previous -> Past. A plan that was used in the past*

Advanced Filter

The toggle next to the filter opens up an advanced filter function useful for narrowing a search using specific parameters.



*These picture symbols are alerts

Naming

SD61 uses a convention for naming IEPs, for example, [61-IEP-\(current year\)](#). When a new designation is brought into MyEd, the Plan will be named using this convention.

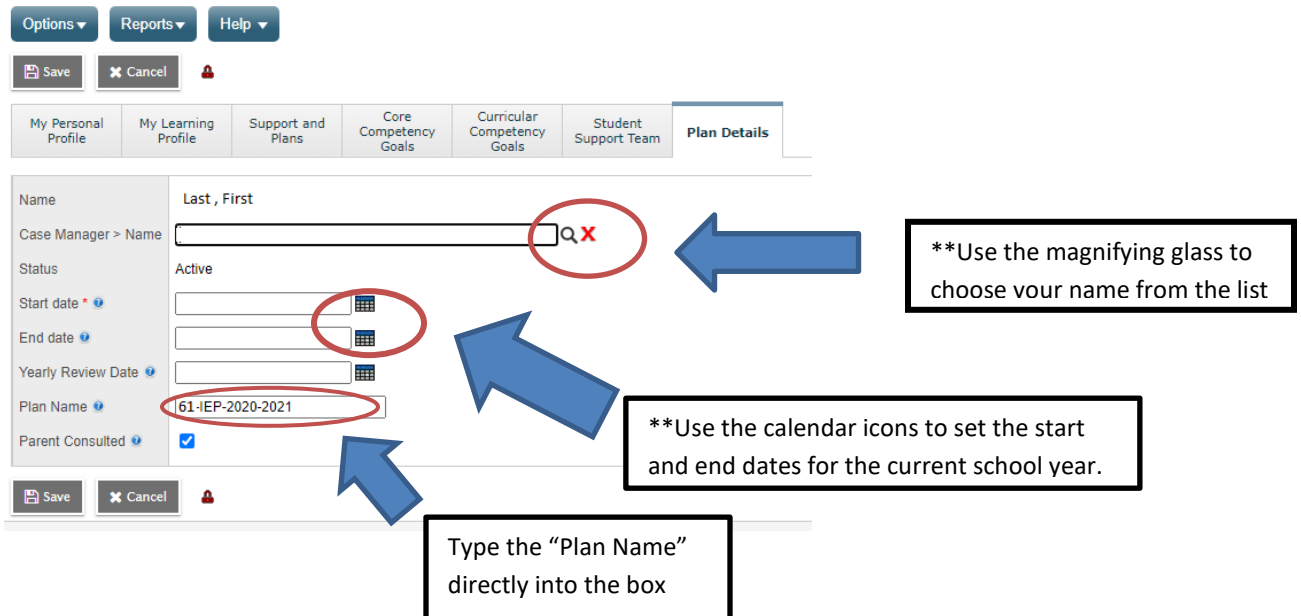
My Cases: Plan Details (Plan Tab)

To create a list of your caseload, you must first assign yourself as Case Manager.

From the [Student top tab](#), use the filter to select [All Records](#).

To assign yourself as Case Manager, open the **Active** plan and click on [Plan Details](#). Use the magnifying glass to access the pick list and choose your name from the list.** As you assign yourself, the students will appear on your [Current Cases](#). You can then filter for [My Cases](#) rather than [All Records](#).

1. Student top tab
2. Filter for "All Records"
3. Click on Student Name
4. Click Plans side tab
5. Click on the Active Plan Name
6. Click on the Plan Details top tab
7. Assign yourself as Case Manager using the magnifying glass
8. Set the "Start Date" and "End Date" for the current school year
9. Update the plan name to reflect the current school year.
- 10. Click Save**



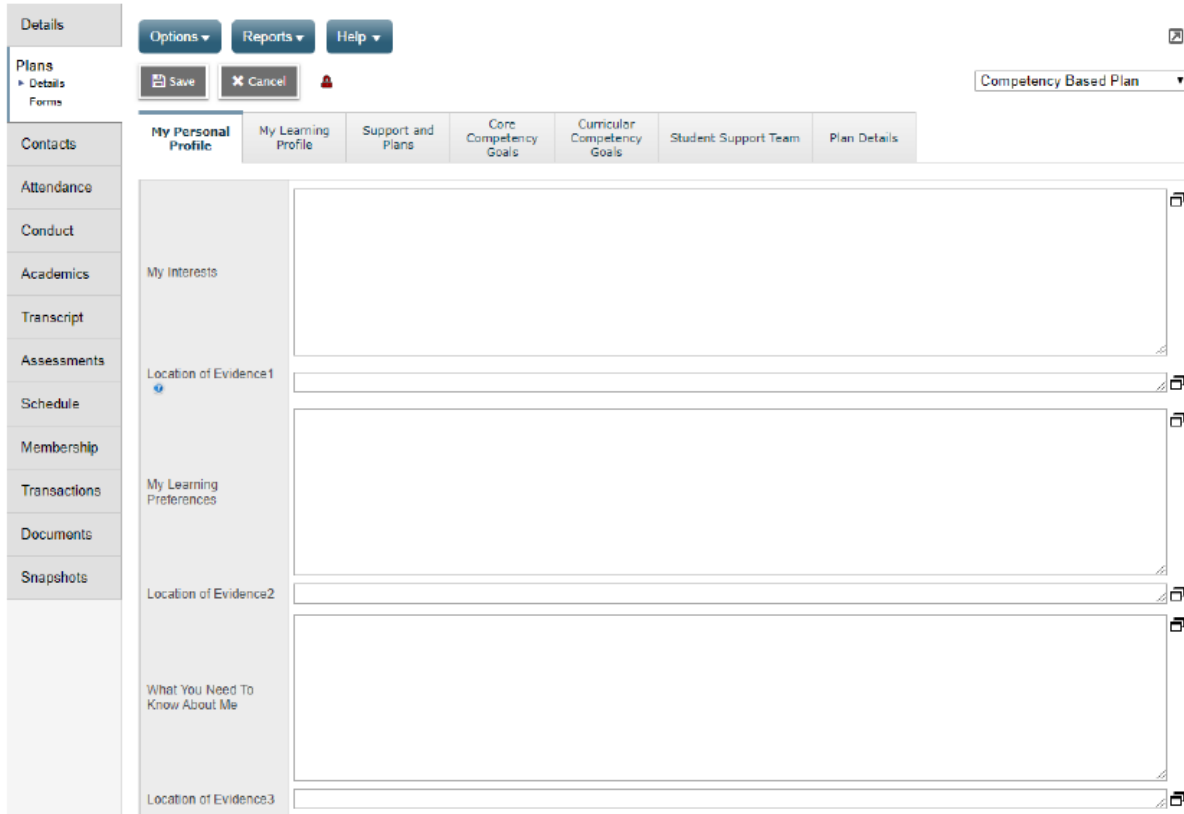
The screenshot shows the 'Plan Details' form with the following fields and annotations:

- Name:** Last, First
- Case Manager > Name:** Search field with a magnifying glass icon circled in red. Callout: ****Use the magnifying glass to choose your name from the list**
- Status:** Active
- Start date:** Calendar icon circled in red.
- End date:** Calendar icon circled in red.
- Yearly Review Date:** Calendar icon circled in red.
- Plan Name:** Field containing '61-IEP-2020-2021', circled in red. Callout: **Type the "Plan Name" directly into the box**
- Parent Consulted:** Checked checkbox



Plan Details

IEP details are entered into tabs: *My Personal Profile*, *My Learning Profile*, *Support and Plans*, *Core Competency Goals*, *Curricular Competency Goals*, *Student Support Team*, and *Plan Details*.

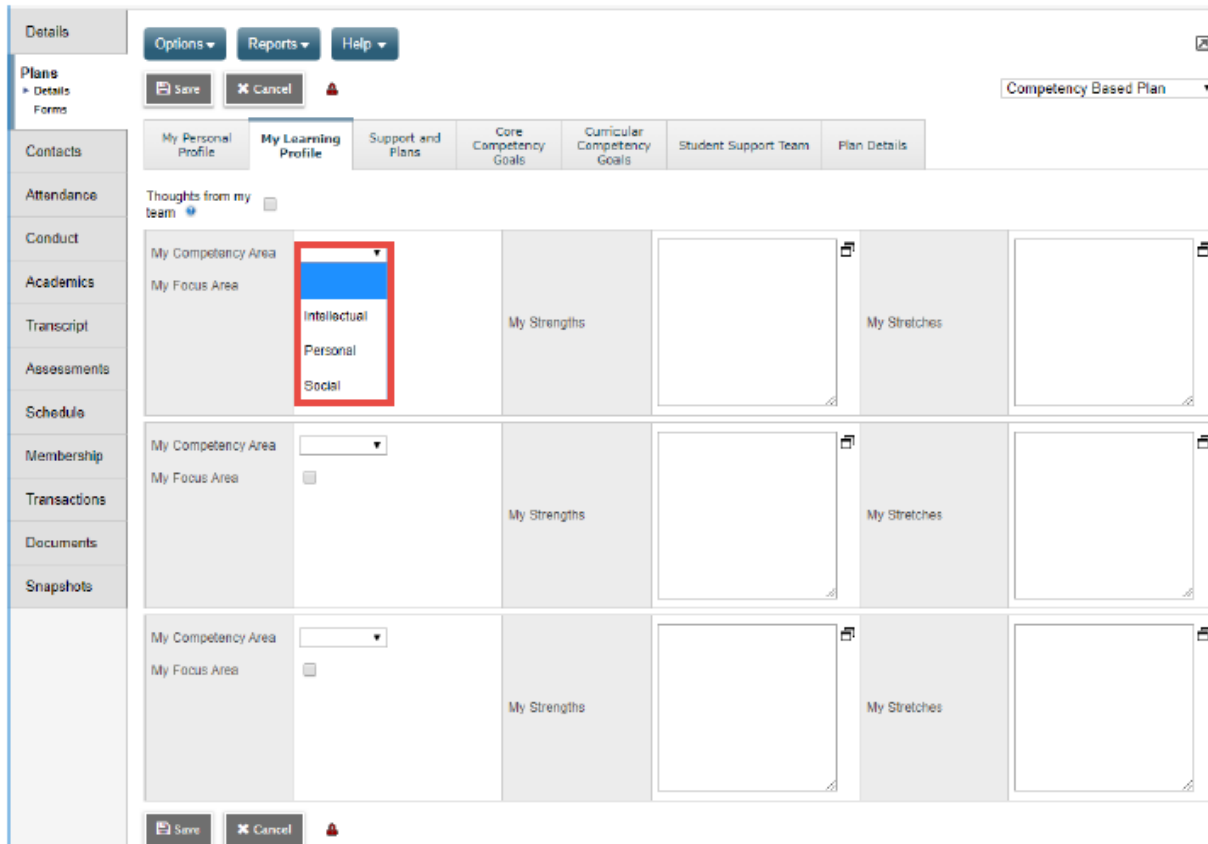
My Personal Profile



- **My Interests, My Learning Preferences, What You Need To Know About Me** - Free form text fields
- **Location of Evidence1, Location of Evidence2, and Location of Evidence3** - Free form text fields which correspond to the *My Interests, My Learning Preferences, and What You Need To Know About Me* fields.
- Click **SAVE** if changes have been made.

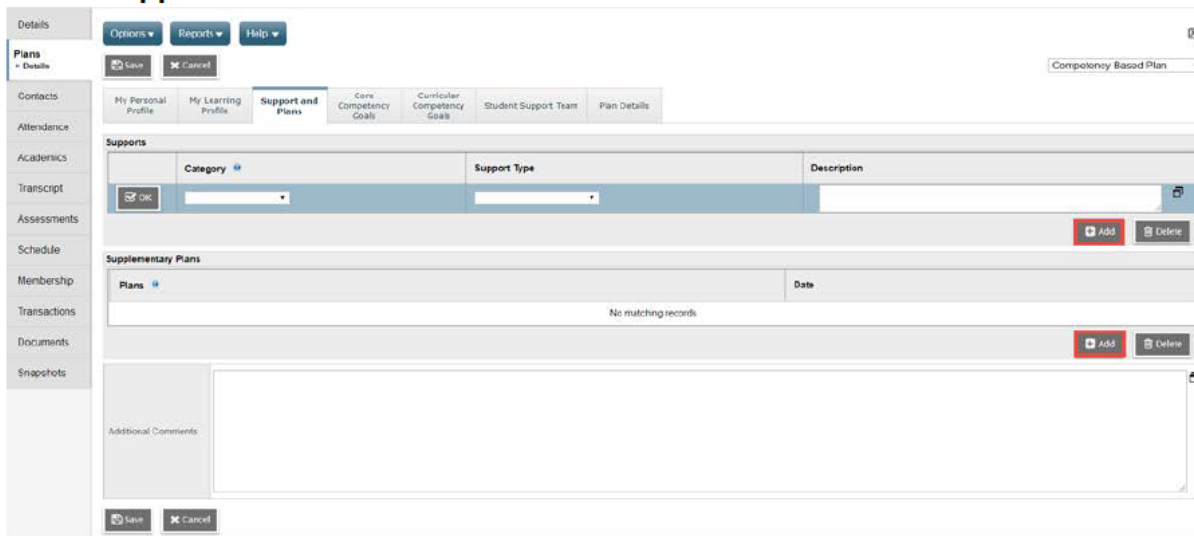
Tip: Place your cursor over the blue information circle  for more information. Click the 'double boxes'  to open the text window bigger.

My Learning Profile



- **Thoughts from my team** - Check this box if the learning profile was completed by the team members rather than in the student's own voice.
- **My Competency Area** - Use the drop down to select
- **My Strengths** and **My Stretches** - Free form text fields
- **My Focus Area** - Checkbox
- Click **SAVE** if change have been made.

Support and Plans



The screenshot displays the 'Support and Plans' interface in MyEdBC. It features a sidebar on the left with navigation options: Details, Plans, Contacts, Attendance, Academics, Transcript, Assessments, Schedule, Membership, Transactions, Documents, and Snapshots. The main content area is titled 'Support and Plans' and includes a 'Competency Based Plan' dropdown. Below this, there are tabs for 'My Personal Profile', 'My Learning Profile', 'Support and Plans', 'Care Competency Goals', 'Curricular Competency Goals', 'Student Support Team', and 'Plan Details'. The 'Supports' section contains a table with columns for 'Category', 'Support Type', and 'Description', and an 'Add' button. The 'Supplementary Plans' section contains a table with columns for 'Plans' and 'Date', and an 'Add' button. There is also an 'Additional Comments' text area at the bottom.

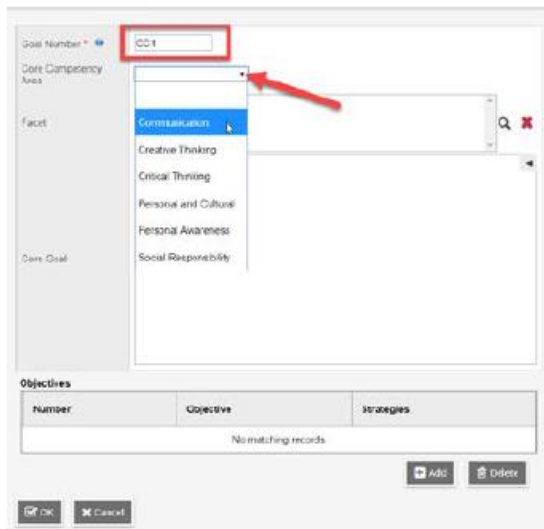
- **Supports**
 1. Click on the **Add** button
 2. Choose the support *Category* (**Universal Classroom Supports** or **Essential Supports**) by clicking on the drop down menu
 3. Choose the *Support Type* by clicking on the drop down menu
 4. Enter the *Description*
 5. Additional supports can be added by clicking **Add** again
 6. Select and click **Delete** to remove a support.
- **Supplementary Plans** - Click on the **Add** button to select the type of plan and enter the date.
- **Additional Comments** - Free form text field
- Click **SAVE** if changes have been made.

Core Competency Goals

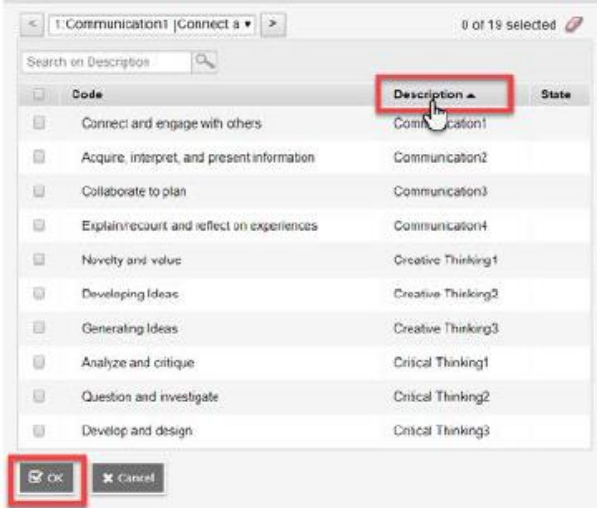


- **Core Competency Goals**

1. Click the **Add** button
2. **IMPORTANT:** Enter a **Goal Number first** - preface the number with CC e.g. CC1, CC2, CC3, etc.
3. Select **Core Competency Area** using the drop down arrow



4. Use the magnifying glass to select the **Facet(s)**, click **OK**
Hint: Click on the 'Description' heading to sort on this field



5. **Core Goals** can be selected by clicking the black triangle ◀ in the right hand corner:

The screenshot shows a form with the following fields:

- Goal Number: CC1
- Core Competency Area: Communication
- Facet: Connect and engage with others
- Core Goal: (Empty)

Below the form is an 'Objectives' table with columns: Number, Objective, Strategies. The table contains the text 'No matching records'. At the bottom are buttons for 'Add', 'Delete', 'OK', and 'Cancel'. A red arrow points to a small black triangle in the top right corner of the Facet field.

- a. Select the Competency from the drop down:

The screenshot shows the same form as above, but with the 'Facet' dropdown menu open. The 'Competency' dropdown is also open, showing a list of options:

- Critical Thinking
- Creative Thinking
- Personal Awareness and Responsibility
- Social Responsibility
- Communication (highlighted)
- Positive Personal & Cultural Identity

A red arrow points to the 'Communication' option. The 'Objectives' table and buttons remain the same as in the previous screenshot.

- b. Select the **Facet** to further narrow down the list.
c. Click to insert the text into the **Core Goal** field:

Goal Number*

Core Competency Area:

Facet:

Core Goal:

Competency:

Show My Codes

Facet:

Search:

- I ask and respond to simple direct questions
Communication | Connect and engage with others
- I am an active listener; I support and encourage the person speaking
Communication | Connect and engage with others
- I recognize that there are different points of view and I can disagree respectfully
Communication | Connect and engage with others

Number	Objective	Strategies
No matching records		

d. Add to or edit **Core Goal** field as required. Click the black triangle ► to hide the selection screen again.

6. In the **Objectives** area, click the **Add** button

Goal Number*

Core Competency Area:

Facet:

Core Goal:

Number	Objective	Strategies
<input type="button" value="Add"/>		

a. Enter the *Number*, *Objective*, and *Strategies* and click **OK**.

b. Click **Add** again to add additional Objectives

7. Click **OK** at the bottom of the window

8. Additional *Core Competency Goals* can be added by clicking **Add** again

9. Click **SAVE**

Curricular Competency Goals

- **Big Ideas –**

1. Use the black triangle ◀ to expand the Area of learning bank.
2. Choose the **Area of Learning** and the appropriate **Grade Level**
3. Click to insert the Big Idea text into the field

4. Add to or edit the Big Idea field as required. Use the black triangle ▶ to hide the selection screen.
5. Click **SAVE** at the bottom of the screen.

- **Curricular Competency Goals**

1. Click the **Add** button
2. **IMPORTANT:** Enter the **Goal Number first** - preface the number with CR e.g. CR1, CR2, CR3, etc.
3. Enter the **Type of Goal** as Replacement or Supplemental
4. Enter the **Teacher Responsible** (can be more than one teacher)
5. Select the **Area of Learning** from the drop down menu
6. Click the black triangle ◀ to access choose the **Learning Standard** from the selection screen.

The screenshot shows the 'Curricular Competency Goals' form in MyEdBC. The 'Goal Number' is set to 'CR1', 'Type of Goal' is 'Supplemental', and 'Teacher Responsible' is 'Mr. Teacher'. The 'Area Of Learning' dropdown menu is open, displaying a list of subjects. A red arrow points to the dropdown arrow, and another red arrow points to the scroll bar on the right side of the list. Below the list, the 'Objectives' section is visible with columns for 'Number' and 'Strategies'. The 'Learning Standard' field is currently empty, and the text 'No matching records' is displayed below it. At the bottom of the form, there are buttons for 'Add', 'Delete', 'OK', and 'Cancel'.

7. Select an **Area of Learning**
8. Select an **Organizer** to narrow down the list

9. Click to insert the text into the **Learning Standard** field

Goal Number ^{*} CR1

Teacher Responsible Teacher Name

Area Of Learning Science

Learning Standard

Communicate scientific ideas claims information and perhaps a suggested course of action for a specific purpose and audience constructing evidence-based arguments.

Area of Learning Science

Show My Codes

Organizer Communicating

Search

Express and reflect on personal experiences of place
Science Communicating

Communicate scientific ideas claims information
Science Communicating

Express and reflect on a variety of experiences perspectives and worldviews through place
Science Communicating

Objectives

Number	Objective	Strategies
No matching records		

+ Add - Delete

OK Cancel

10. Add to or edit the **Learning Standard** field as required. Use the black triangle to hide the selection screen.

11. Add **Objectives**

- Click the **Add** button
- Enter the *Number*, *Objective*, and *Strategies* and click **OK**
- Click **Add** Again to add additional Objectives.

Goal Number ^{*} CR1

Teacher Responsible Teacher Name

Area Of Learning Science

Learning Standard

Communicate scientific ideas claims information and perhaps a suggested course of action for a specific purpose and audience constructing evidence-based arguments.

Objectives

	Number	Objective	Strategies
<input checked="" type="checkbox"/> OK	0		

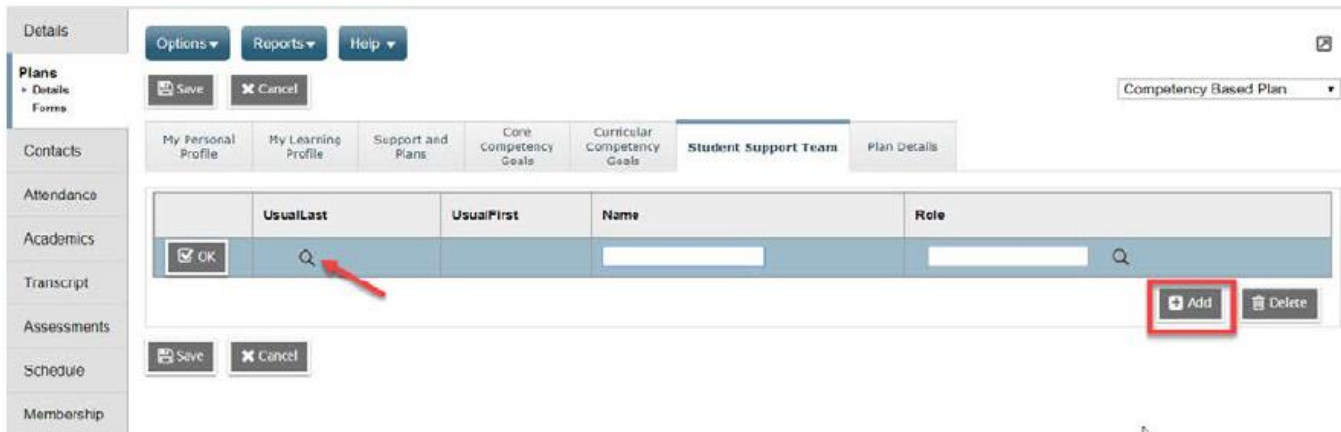
+ Add - Delete

OK Cancel

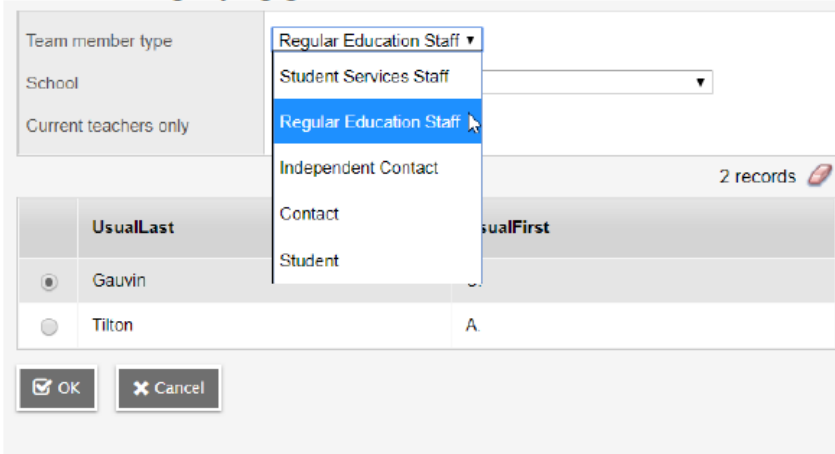
12. Click **OK**

13. Click **SAVE**

Student Support Team



1. Click **Add** to add a support team member. Members can be selected from a pick list or typed in.
2. Click the magnifying glass to select a staff member or contact from a pick list:

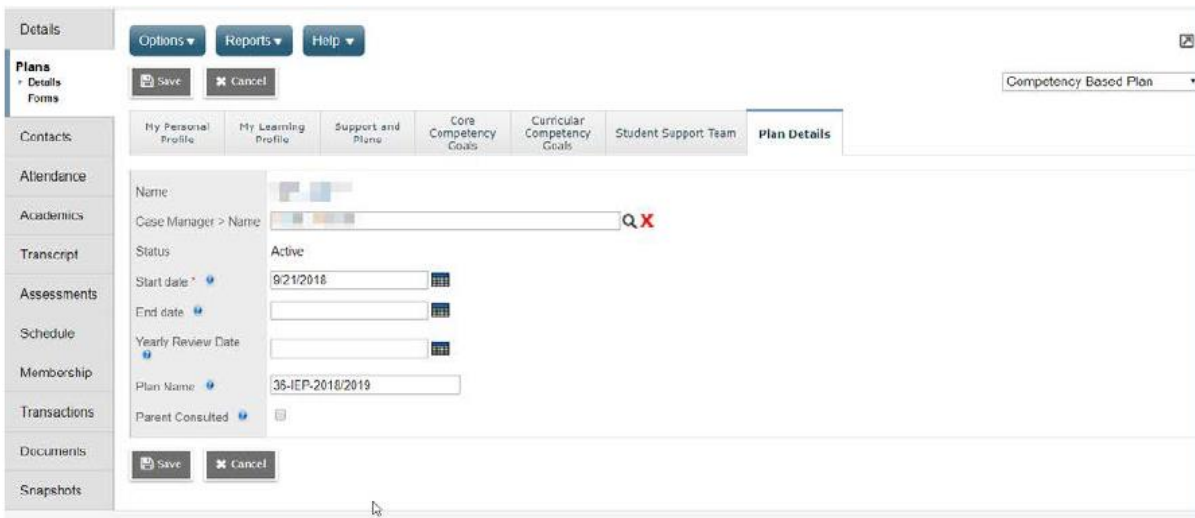


- a. Select a *Team member type*:
 - i. **Student Services Staff** - District level staff
 - ii. **Regular Education Staff** - School Level Staff
 - **Current teachers only** will display the student's teachers. Uncheck this checkbox to access all staff members at your School
 - iii. **Contact** - Student's contacts
3. If the team member you are adding is not available to select, you can alternatively type directly into the **Name** field.
 4. Enter the team members **Role**.
 5. Click **Add** again to add additional team members. Only one team member should be listed per line.

Note: Some staff members will have the role of 'Case Manager' fill in automatically. If the staff member is not this student's Case Manager it is important to overwrite this, otherwise the words 'Case Manager' will display next to the staff member's name on the printed IEP report. Each Plan can only have one Case Manager.

6. Click **SAVE**

Plan Details



The screenshot shows the 'Plan Details' form in MyEdBC. The form is titled 'Plan Details' and is part of a 'Competency Based Plan'. It includes a sidebar with navigation options: Details, Plans, Contacts, Attendance, Academics, Transcript, Assessments, Schedule, Membership, Transactions, Documents, and Snapshots. The main form area contains the following fields:

- Name:** A text field with a dropdown arrow, containing a blurred student name.
- Case Manager > Name:** A search field with a magnifying glass icon and a red 'X' icon.
- Status:** A dropdown menu set to 'Active'.
- Start date:** A date picker set to '9/21/2018'.
- End date:** An empty date picker.
- Yearly Review Date:** An empty date picker.
- Plan Name:** A text field containing '35-IEP-2018/2019'.
- Parent Consulted:** A checkbox that is currently unchecked.

At the top of the form, there are buttons for 'Options', 'Reports', and 'Help'. Below the form, there are 'Save' and 'Cancel' buttons.

- **Name** - fills in the student's name automatically
- **Case Manager** - select from the pick list, or type **last name** to auto-populate
- **Status** - the IEP Status of **Draft**, **Active**, or **Previous** is determined by the *Start date* and *End date*.
- **Start Date** – defaults to the date the Plan is created.
- **End Date** - leave blank until you are renewing the IEP the following year
- **Yearly Review Date** - Optional
- **Plan Name** - Per provincial standard, District number-Plan Type-School Year:
- **61-IEP-2021/2022**
- **Parent Consulted** - check this box once the parent/guardian consultation is complete. Parents must be offered the opportunity to participate in the IEP process. This box **MUST** be checked on **all IEPs**.
- Click **SAVE**.

Note: Once you have entered your name in the Case Manager>Name field, you will be able to filter for the students on your caseload by choosing the Filter 'Students in My Cases – Active and Draft' from the Student top tab.

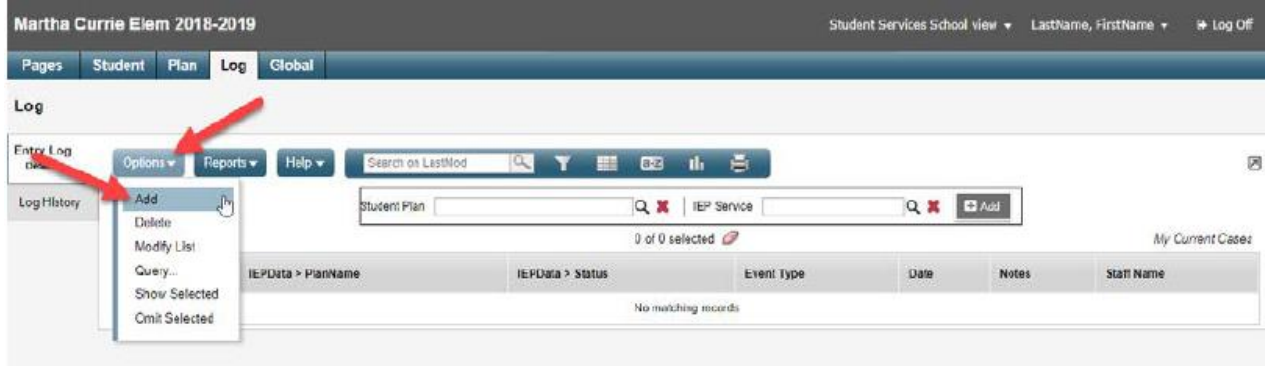
**If you don't see your name in the Case Manager pick list, check with your administrator to confirm that a SIS account request has been created.

***If issues persist, contact the Help Desk

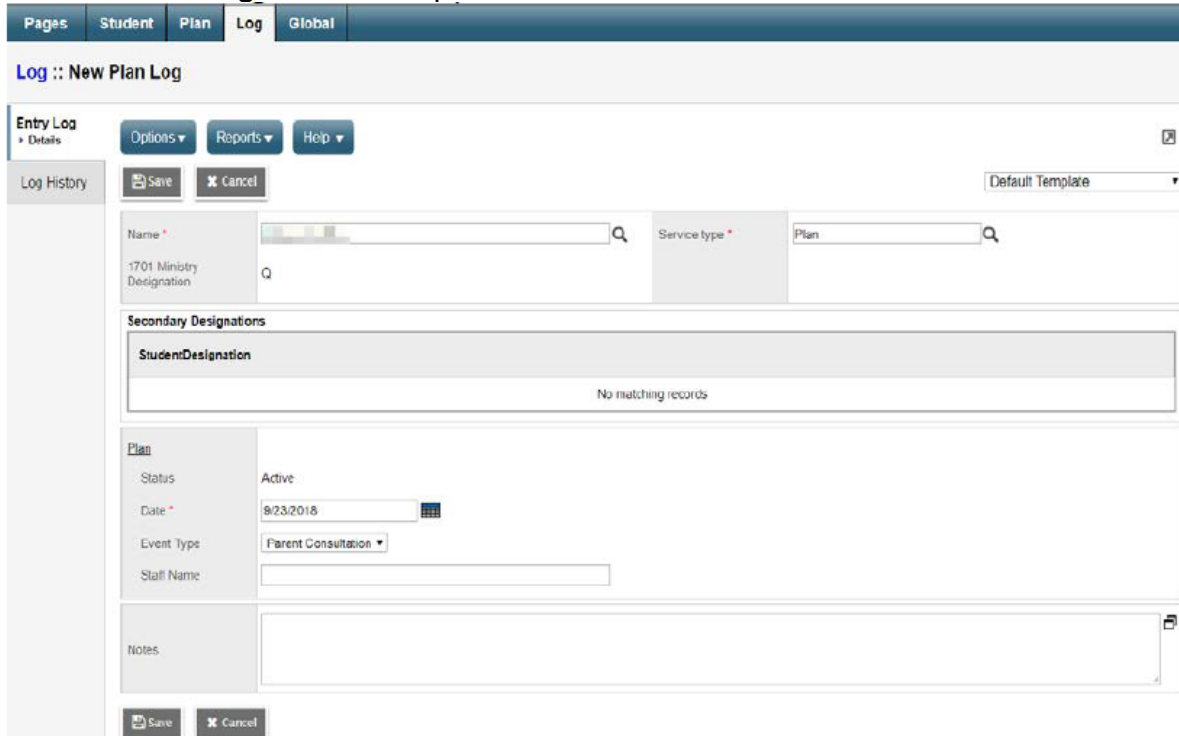
Parent/Guardian Consultation Date

Parent/Guardian Consultation needs to be recorded on the **Log** top tab in order to populate the Parent/Guardian Consultation Date on the printed IEP report.

1. Click on the **Log** top tab > **Entry Log** side tab
2. From the **Options** menu, select **Add**



3. The **New Plan Log** window will open:



- **Name** - select the student using the magnifying glass
- **Service type** - required field. Use the magnifying glass to select 'Plan'
- **Date** - enter the Parent/Guardian Consultation Date
- **IMPORTANT: Event type** - select **Parent Consultation** from the pick list.
- **Staff Name** – enter your first and last name

4. Click **SAVE**
5. This log entry will populate the Parent/Guardian Consultation **Date** field on the printed IEP Report.

Print the IEP Report

Once you have completed writing the IEP you can Run the **Competency Based IEP Report**. The report can be accessed from **Reports** menu on the following locations:

- For an *Individual Student*: **Student** top tab > **Plans** side tab > **Details** sub side tab > **Reports** menu > **Competency Based IEP Report**
- For *Multiple Students*: **Plan** top tab > select the IEP's you would like to print > **Options** menu > **Show Selected** > **Reports** menu > **Competency Based IEP Report**

Note: The Competency Based IEP Report can also be Run in School View or Staff View from the Student top tab > Documents side tab > Plans sub side tab > Details.

Competency Based IEP Report

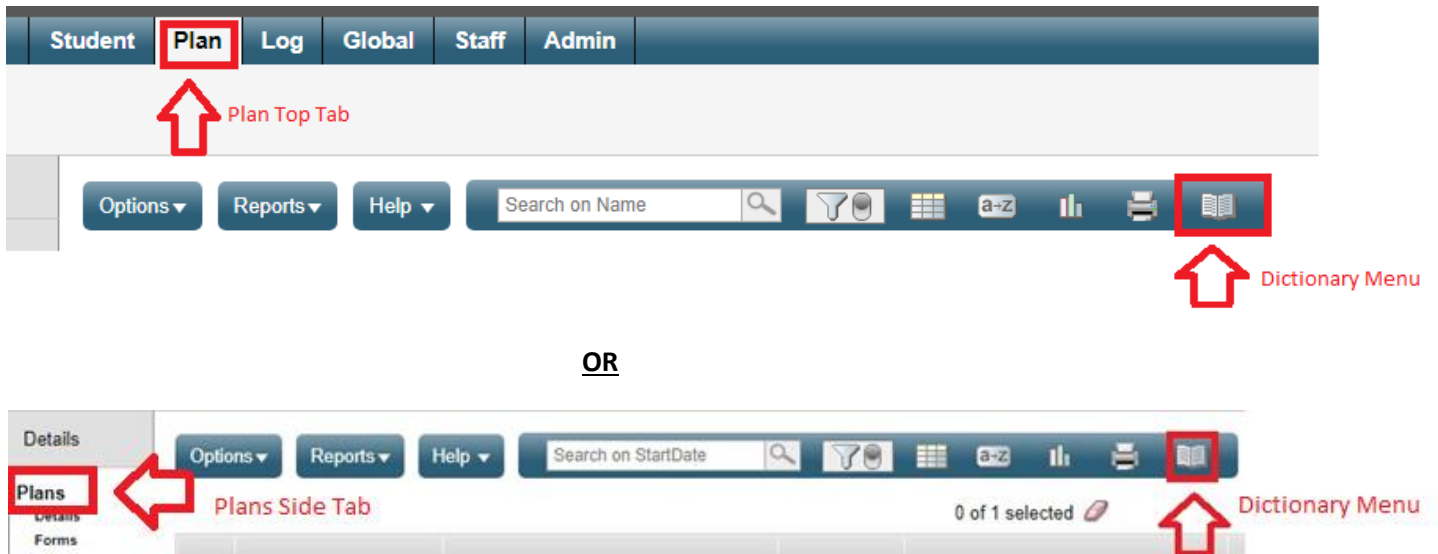
Students to include	Current Selection ▼
Print Legal Name	<input type="checkbox"/>
Sort results by	Student Name ▼
Print in French Language	<input type="checkbox"/>
Print on Both Sides	<input type="checkbox"/>
Format	Adobe Acrobat (PDF) ▼

- **Students to include** - current selection
- **Print Legal Name** - unchecked will print usual name, checked will print legal name
- **Sort Results by** - select a sort order if printing more than one IEP
- **Print in French Language** - unchecked will print in English, checked will print in French
- **Print on Both Sides** - if printing multiple IEP's this will insert a blank page after IEP's with odd numbered pages to allow for double-sided printing.
- **Format** - Adobe Acrobat (PDF)
- Click **RUN** - this will run a PDF report which can then be printed and/or saved

Showing both BC IEP files and Competency Based Plans

To Show both the BC IEP and the CB IEP Plans, you will need to use the **Dictionary Menu**.

- There is access to the Dictionary Menu from either the **Plan Top Tab** or the **Plans Side Tab**
- Click on the Dictionary Menu icon and choose **All** to display both Plans



The image shows two screenshots of the MyEdBC interface. The top screenshot shows the 'Plan' tab selected in the top navigation bar, with a red box around it and an arrow pointing to it labeled 'Plan Top Tab'. Below this, a toolbar contains several icons, with a red box around the Dictionary Menu icon (a book with a magnifying glass) and an arrow pointing to it labeled 'Dictionary Menu'. The bottom screenshot is separated by the word 'OR' and shows the 'Plans' side tab selected in the left navigation pane, with a red box around it and an arrow pointing to it labeled 'Plans Side Tab'. The same toolbar is visible, with a red box around the Dictionary Menu icon and an arrow pointing to it labeled 'Dictionary Menu'. The text '0 of 1 selected' is visible in the bottom right of the second screenshot.