



User's Guide



Online IEP and Special Education
Information System

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Overview

Chapter 1

Introduction to Emerge

Emerge is a Web-based IEP and special education information system that enables you to work on your IEPs from any computer with Internet or district network access. No records or information are stored on your computer; everything resides on the main computer at your district or at Healex Systems.

IEPs are stored on the system along with associated student demographic data: Every IEP written is archived and available for review, and all data is backed up on a daily basis. With the proper user name and password, you gain access to your caseload records and various system tools. There is no limit to the number of team members working in the system or reviewing a student's IEP. All IEP forms are available, as well as goals and objectives libraries.

Emerge's Job

Emerge replaces all IEP paperwork with online forms and other student information data entry screens. Team members use Emerge in their classrooms, offices, team meetings, parent meetings, and at home.

When it is time to review an IEP, team members login and select the proper student. Administrators reviewing IEP quality and compliance login and view any student's IEP at any school. Emerge is the central shared team workspace for IEPs and other special education data.

Benefits

The purpose of Emerge is to improve the educational outcomes of special needs children and reduce the logistics of writing and reviewing IEPs. In addition, Emerge makes it easy to run reports on special education data for funding, compliance, and accountability. Teachers, providers, and administrators all save great amounts of time which can be redirected to the classroom.

You will realize the following benefits:

- Save time in writing and reviewing IEPs, data entry, information gathering, and reporting; spend more time with students
- Raise the quality of your IEPs
- Easily track student performance goals and progress
- Improve information gathering and compliance
- Raise the level of collaboration between team members
- Present IEPs to parents and auditors with a more professional image

Capabilities

Depending on your user role, Emerge enables you to do the following tasks online at home or school:

- Fill out an entire IEP
- Archive an IEP
- View old IEPs
- Use district and personal goals and objectives libraries
- Search for student records
- Run reports and export data
- Manage student records and caseloads
- Edit student and parent information
- Set forms library preferences
- Manage system users and system settings
- Calendar Management

Chapter 2

Basic Requirements

Using Emerge requires very little from your computer, since most of the work is done on the main computer that runs the software – the server. You do, however, need the following:

- An Internet connection
- Microsoft Internet Explorer 5.5 or higher
- Acrobat Reader 4.0 or higher
- A user name and password

Logging in and Logging Out

Getting into the Emerge system is quite simple.

If you run into problems, make sure you are typing your password in lower case letters, or you can check with your supervisor to verify your user name and password. You can also try closing your Internet browser and beginning again with the following procedure:

1. Go to the Internet address supplied by your supervisor with Microsoft Internet Explorer 5.5 or higher.
2. Type in your user name and password in lowercase letters and press **Login**. The main screen will now come up.
3. Go to the upper right of the screen and click **Logout** when done.



The Main Screen

After logging into the system, you will be presented with the main screen that will display your school district's name and your caseload. From here, you will be able to select the school and the appropriate student and begin working on an IEP.

Main menus in the upper right portion of the screen give you access to all functions. After you select a main menu, its submenu will appear on the far left of the screen. Your access to the main menus and submenus is determined by your approved user level and role on the team.

RED APPLE SCHOOL DISTRICT

Help | Admin | Logout

Main Menus → View IEP | Manage | Report | Search

Student Records
Manage Students:
» View Students

Sub-Menus

Select a Student

Select School: Thomas Jefferson High School

To work on the IEP forms or to create a new IEP Application for a student, click the student's last name.

▲ Last Name	First Name	Student ID (District)	Student ID (State)	Date of Birth	Grade	School Name	Parent Name	PET Date	Closed
Anderson	Alice	457564	457564	12/25/1990	01	Thomas Jefferson High School		04/01/2003	No
Armonno	Joe	123789	123789	04/22/1990	01	Thomas Jefferson High School		03/31/2003	No
Bishop	Cathy			03/18/1985	10	Thomas Jefferson High School		03/06/2003	No
Clinton	Billy	asd	asd		01	Thomas Jefferson High School		03/24/2003	No
Fisher	Debbie	678678	678678		01	Thomas Jefferson High School		- NO IEP -	No
Harris	robert				01	Thomas Jefferson High School		- NO IEP -	No
Harris	robert				01	Thomas Jefferson High School		- NO IEP -	No
Thomas	Dustin	288497	288497	06/29/1990	06	Thomas Jefferson High School	Parent Na..	05/14/2003	No

Caseload

Resize the window by dragging the edge.

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Emerge-IEP Internet

Main Menus

The seven main menus in the upper right of the screen provide the following capabilities depending on your user level:

View IEP

Select the appropriate school and student to review or write an IEP.

Manage

Change caseloads and work with student and parent demographic records.

Report

Run standard reports on special education statistics across the district.

Search

Locate students with a variety of criteria.

Help

Download and view training materials.

Admin

Change your system settings or other user and system settings.

Logout

Sign off the system.



Personal System Settings

Each system user can edit their demographic information, unlock forms, or view basic data about their computer and browser. To change your demographic information, click **Edit My Profile**, change information on your profile page, and press **Save**. You will be able to change everything except your User Group, assigned schools, Login Name, and caseload.



Viewing Your Caseload

After login, your caseload will be displayed with links to each student's IEP. Just click on the last name shown in blue in the first column of the list. If you cannot find your student, make sure you have selected the proper school for the student from the school selector list.

Select a Student

Select School: Test School Number Two

- To work on the IEP forms or to create a new IEP Application for a student, click the student's last name.

Adjust View Print Table ...

▲ Last Name	First Name	Student ID (District)	Student ID (State)	Date of Birth	Grade	School Name	Parent Name	Current IEP Meeting Date	Closed
Coad	Peter	112233	111222	08/26/2000	01	Test School Number Two		- NO IEP -	No
Grant	Frank				01	Test School Number Two		- NO IEP -	No
John	Mac				01	Test School Number Two		- NO IEP -	No

You can do an ascending or descending sort on each of the columns by clicking on a column name such as **Date of Birth**. By putting the mouse over the **Adjust View** button, you can also select which columns will be displayed.

Printing and Exporting a List

In order to print the list, press the **Print Table** button when in the print preview.

Select a Student

Select District/School: Zone 1 - Demo School District (Lewiston) Zone 1 - Jefferson High School (for demo)

- To work on the IEP forms or to create a new IEP Application for a student, click the student's last name.

Adjust View Print Table ...

Last Name / First Name	Student ID (District)	Date of Birth	Gender	Grade	IEP Date	Re-Eval Due Date
Aparicio Bernard	714215	12/29/1998	Male	06	01/27/2004	
Crowther Geoffrey		09/01/1991	Male	05	- NO IEP -	
John Mac	546554	02/07/1990	Male	09	- NO IEP -	04/17/2003
Zeszut Mark	765101	09/09/1990	Male	06	- NO IEP -	

Creating, Selecting, and Closing IEPs

After selecting your student, the existing IEP will be displayed, or you will be sent to the IEP history screen with the option to create an IEP. To review all records, click **View All IEPs** on the submenu on the left part of the screen.

Form Menu

Manage Forms:

- » Create New IEP
- » View All IEPs
- » View Form Compliance

Manage Calendar:

- » View Task
- » View Calendar

Create a New Set of IEP Forms

Student Information			
Student Name: Andrew A. Charles			
Date of Birth:	05/31/1989	Age:	14
Grade:	07	Gender:	-
Disability:	LD - Learning Disability		
Home School:	Bay Side Middle School (for demo)		
Home District:	Zone 1 - Demo School District #1		
Parent/Guardian:		Parent/Guardian:	
Home Phone:		Home Phone:	
Other Phone:		Other Phone:	

IEP Application History	
Open New IEP Application:	
IEP Date (Created):	07/22/2003
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Create an IEP

1. Click **Create New IEP** in the submenu on the left side of the screen.
2. Enter the desired date.
3. Click **Save**.

Select an IEP

1. Find the correct date.
2. Click **Show IEP Forms** for the desired document.

Close an IEP

1. Find the correct date.
2. Click the **Closed** checkbox.
3. Click the **Save** button.

IEP Application History			
IEP Date (Created)	Closed	View/Open IEP Forms	Delete IEP Forms
07/04/2003	<input type="checkbox"/>	<input type="button" value="Show IEP Forms"/>	<input type="button" value="Delete IEP Forms"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Compliance

When you start to work on a Student's IEP form, a Compliance Box will appear showing a list of forms required to be completed. Once the required forms are completed, you will no longer see this box.

View Form Compliance Reminder - Microsoft Internet Explorer

Form Compliance Reminder

Bernard R. Arculus

Following form(s) must be completed to meet compliance requirements.

Form Title (not completed)	Comment
MEA Assessment Accommodations	The field 'Student will need accommodations' is checked on 'Page 2' form
Districtwide Assessment Accommodations	The field 'Districtwide assessment accommodations needed' is checked on 'Page 2' form
Modification/ Accommodation Plan	The field 'Accommodations/Modifications Required' is checked on 'Page 2' form

Cancel

View Tasks

Check the Task section to see if any notes have been entered in relation to the student selected. Add Task to arrange parent meeting, for example. You can add comments, set a due date and also set a reminder which will email you at the appropriate time.

Add or Update Task - Microsoft Internet Explorer

Add a New Task

Task Detail

Task:

Due Date: (Expected completion date used to send reminder).

Reminder: Send Reminder days before the due date.

Task Completed: Yes No Task Completed Date:

Comment:
(Comment will be included in the email notification).

Save Cancel

Using Calendar Functionality

In order to access the calendar, click on the **View IEP** tab and then select the school district from the dropdown menu. Select a student, and on the left hand side of the screen, under Form Menu, click on **View Calendar**. You can add events to the calendar for days in the current month, or you can edit a different month by clicking on **Month** at the top of the screen.

You can invite other people to attend meetings, set start and end time, set reminder.

Administrators can see the calendars for all students.

To add an event, find the appropriate day and click on the time you would like the event to be scheduled for. Then fill in the information and click Save. You can also view a list of all events in your calendar by clicking on **Events**. This will bring up an Events List. You can click on the title of the event to edit, update or delete it.

Add New Event

Add Event

Title: Standard Events: Standard Event 1	
New Event Title: <input type="text"/>	
Location: <input type="text"/>	
Start Date: 8/6/2003	Start Time: 11:00 AM
End Date: 8/6/2003	End Time: 8:00 AM
Message: <input type="text"/>	
Invite People: Select Attendees (System Users)	
Edit Attendees Enter the email addresses of people you wish to invite those are not in the system. Place a comma between each email address. <input type="text"/>	
Reminder: <input type="checkbox"/> Send Reminder 1 day before Event	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Event Lists

Event Lists

	Event Title	Date
1	Standard Event 1	6/27/2003 11:00:00 AM
2	IEP Meeting Minutes	6/27/2003 1:00:00 PM

Chapter 3

A Friendly System

Working on IEPs with Emerge is quite simple. Since Emerge forms look just like your paper forms, you will be up and running very quickly. The features you access will be based on your role as a Case Manager, Coordinator, Administrator, or Director.

User Level Summary

Emerge has many types of users performing different tasks. Each uses the system quite differently and is assigned different forms of access. Each user level has different abilities and, unless noted, gains the capabilities of the level just before it. This is a brief overview of four of the main user levels:

1. Case Manager

- Work with assigned caseload records from all assigned schools.
- Print and export the caseload list.
- Create, review, fill out, revise, and close IEPs.
- Search for caseload records.
- Change the personal profile.

2. Support/Diagnostic Staff

- Access records for assigned schools.
- Assign students to Caseload Managers.
- Can edit IEPs, but not demographic information.

3. Administrator

- View caseload records for entire district.
- Edit student and parent demographic information.
- Assign caseloads to Coordinators.
- Add and modify school listings.
- Create, edit, and delete Coordinator and Case Manager users.
- Set IEP form preferences.

4. Co-op Director

- Create, modify, and delete Administrator Users.
- Delete IEPs and student and parent demographic data.
- Set system parameters.

Do's and Don'ts

As you begin to use the system, several tips will be helpful. Since Emerge and your caseload records are not stored on your computer, the system will behave differently than if it was on your computer.

When you open an IEP or data entry screen, you are opening a view into an area or page. While someone cannot edit the page you are working on, any number of people can view it and edit other pages in the student's IEP. These factors make it helpful to remember the following:

Be patient.

After you click on an item, wait a bit for a page to load or save. Since your connection speed and quality will vary with the time of day and your location, you will have a different experience each time. As with viewing other material on the Internet, things slow down as more people get online. By picking times when your Internet provider is less busy (such as early morning, etc.) you will have a better experience and complete your work more quickly than accessing the system during peak Internet loads at home or at school.

Frequently save your work.

From time to time, you may lose your Internet connection. Be sure to save a page right after you make changes. Emerge depends on an open session with your computer over the Internet. If you disconnect from the Internet or encounter network problems, you will lose your Emerge session and need to begin again: Only saved pages survive an Internet interruption. Remember to save often: An Internet connection loss has the same effect on an unsaved file as losing electric power to your computer.

Do not leave your computer logged in without you. Logoff.

Once you are done working or need to leave your computer, be sure to logout. If you do not logout, the system will automatically require a user name and password after a period of time set by your director. Remember, if you are logged in, student records are accessible: It is just like leaving a file folder open on your desk.

Do not give your user name and password to anyone.

If someone has your user name and password, they have the same capabilities with your records as you do. Team members authorized to work with a student will be given a user name and password by the director. Again, if someone does not have access, do not provide yours. Ask your colleague to contact the district office.

Do not use the Back button on your browser.

Emerge utilizes screen frames which work best without the **Back** button.

Filling in IEP Forms

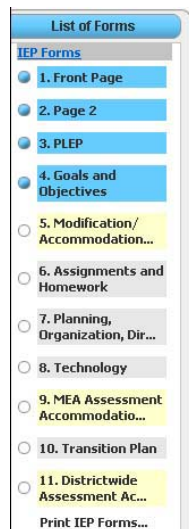
After you have selected the IEP you wish to work with, your screen will show a list of IEP forms on the left and a document display window on the right. To view a form, click on the form in the forms list in the left part of the screen. If a form has not been created, you will be given the choice of creating it:

Front Page Index Page (Summary)

Front Page Index Page (Summary)					
Form Index (Click a link below to Edit/View a form)	Language Used to Fill Form	Date Form Created	Date IEP Created	Select Form(s) to Update Status*	Select Form(s) to Print/Delete
Form Index - 1	English	01/27/2004	01/27/2004	<input type="checkbox"/>	<input type="checkbox"/>
*Finalize/close form(s) or open finalized/closed form(s).					

Add Form
Update Status
Delete Form
Print Form

The Forms List



After working on some forms, you will notice that they turn different colors. Your director has determined the conditions under which the orange and blue colors appear:

Gray – The form has not been edited.

Orange – Some work has been done on the form.

Blue – The form is complete.

Yellow – Not edited. Must be completed to meet Compliance Requirements.

Entering Data and Text

There are several ways to record information on forms. Some require narrative responses, while others only need short amounts of text or a yes or no. The Emerge Web forms have the following choices:

Text Boxes

Type in the text. Use the scroll arrows on the right to reveal all text. You can also copy text from other programs and paste it in any Emerge textbox.

Check Boxes

Click the box to indicate Yes.

Special Special

Date Fields

Double-click the field.
Select a date, and click **Save**.

Dropdown Lists

Click the arrow.
Then click your choice.

Radio Buttons

Click the white circle next to your choice and click the **Select** button.

7	<u>G. STYLISTIC AND RHETORICAL ASPECTS OF WRITING AND SPEAKING</u> Students will use stylistic and rhetorical aspects of writing and speaking to explore ideas, to present lines of thought, to represent and reflect on human experience, and to communicate feelings, knowledge, and opinions. Students will be able to:	<input type="radio"/>
8	<u>H. RESEARCH-RELATED WRITING AND SPEAKING</u> Students will work, write, and speak effectively when doing research in all content areas. Students will be able to:	<input checked="" type="radio"/>

Required Fields

You will also notice that some forms will not let you save until you have filled in certain fields. You will receive a warning that the form is incomplete and then be directed to a highlighted field to be filled in. When you have completed all highlighted fields, you may save the form.

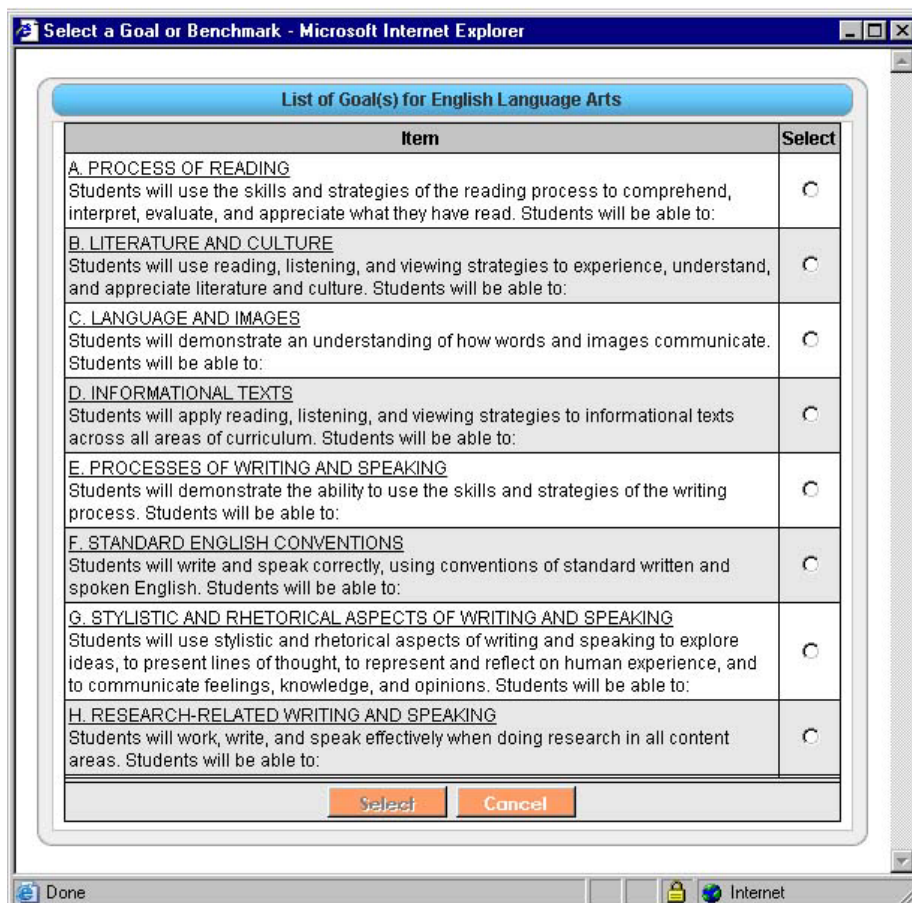
Goals and Objectives Libraries

Emerge gives the option of also creating your own set of goals and objectives for a student's IEP. You can choose from the district or state library or select lists that you have created.

To choose an objective, you have two options:

1. You can select an objective from your own list by clicking on the **My Goals** button and selecting the desired objective. (Note: If you have not yet added any objectives to your personal list, follow the directions in the next section of this manual).
2. You can select an objective directly from the Maine State Learning results.
To do this:
 - A. Select the **Add Form** button on the IEP form that includes the student's goals and objectives.
 - B. From the Goal Area dropdown menu, select the desired area and then click on the **Maine State Goals** button.

- C. This will bring up a dialog box with the objectives for the specific goal area you selected. Click on the desired goal.



- D. The goal will now be inserted into the Maine State Learning form.

- E. When you are finished editing the Goals and Objectives, click **Save**.

Creating Personal Goals and Objectives

If you want to create your own goals or objectives, you can store them in Emerge. Only you will be able to see them, but they will be available for future use. In order to access your goals and objectives, you must choose a goal from the **My List**. When you go to select an objective, you will see only your personal objectives list.

To add or edit a goal or objective:

1. Click on the **My List** Button.
2. Type the title of your new goal in the goal heading text box.
3. Type in the goal in the goal text box.
4. Click the **Save** button.
5. To edit a goal, click on the title, make changes, and save.
6. Creating your objectives is identical, except that you will find them in the objectives portion of the IEP form. Click the **Select Objective** button. You must choose a personal goal first to get access to your objectives.

S.No.	Item	Select
1	Heading 1 1 1 1 Goal 1 1 1 1 4 4 4 4 4	<input type="radio"/>
2	Goal Heading 22222 Goal 22222	<input type="radio"/>
3	Goal Heading 33333 Goal 33333	<input type="radio"/>
4		<input checked="" type="radio"/>

Add New Item:

Goal Heading:

Goal:

Printing Forms

Press the **Print Form** button on the form and press the printer icon on the print preview window that comes up. You can also press the **Print Forms** button at the bottom of the IEP forms list on the left of the screen. Click the check box next to the forms you wish to print and click the **Print Form** button.

Select IEP Form(s) to print

1. P.E.T. Meeting Minutes	<input type="checkbox"/>
2. IEP Front Page	<input type="checkbox"/>
3. Present Level of Educational Performance	<input type="checkbox"/>
4. Parental Involvement	<input type="checkbox"/>
5. Modifications to the Maine Educational Assessment o	<input type="checkbox"/>
6. Transition Plan	<input type="checkbox"/>
7. Behavior Intervention Plan	<input type="checkbox"/>
8. I.E.P. Goals and Objectives Ver.2	<input type="checkbox"/>

IEP System - Print All Forms - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Healex Processed all forms. Emerge v 2.5

100%

Individual Education Plan (IEP) for Alice Anderson Date of PET: 04/01/2003

Transition Plan

Student: Alice Anderson	D.O.B: 12/25/1990	Age: 12
Initial Transition Plan Date: 07/15/2003	Reviewed/Revised	

Unlocking Forms

Sometimes, you will be unable to edit a form. This means that another user is working on this form and has not saved their work. Usually, if you wait a few minutes, you will be able to get in when they have saved and exited the form. However, sometimes users forget to exit the edit mode and turn off their computers, and the form stays locked, preventing anyone from entering the edit mode.

If this occurs, go to the **Admin** main menu and select **Unlock Forms** from the submenu. You will see a list of forms that have been left open. Select the form you wish to work with and select **Save**.

Unlock IEP Form(s)				
0	05/13/2003	P.E.T. Meeting Minutes	03/14/2003 9:03:34 PM	<input checked="" type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>				

Using Advanced Features

Chapter 4

Searching

Due to the size of your caseload or the pool of student records you must examine, you may wish to use Emerge's powerful search features. All user levels can run searches on records under their responsibility. Go to the search menu, fill in your criteria, and click the **View Students** button. The search results list will be displayed in the lower half of the screen and offer the same features as the caseload list such as printing and list exporting.

The search form is located at the top of the interface and includes the following fields:

- Buttons: View IEP, Manage, Report, Search
- State Agency: Yes No
- Health Services Plan: Yes No
- Exit Data: [Dropdown]
- Exit Date: [Date Range]
- Suspension Tally: [Dropdown]
- Receiving School: [Text]
- Address section:
 - Street1: [Text]
 - Street2: [Text]
 - City: [Text] State: [Text] Zip: [Text]
 - Home Phone: [Text]
- View Students button

List of Students

- To work on the IEP forms or to create a new IEP Application for a student, click the student's last name.

▲ Last Name	First Name	Student ID (District)	Student ID (State)	Date of Birth	Grade	School Name	Parent Name	PET D
Coad	Peter	112233	111222	08/26/2000	01	Test School Number Two		- NO IEP
Grant	Frank				01	Test School Number Two		- NO IEP
John	Mac	4575	254556	12/21/1993	01	Test School Number Two		03/12/20
Lepine	Chris				01	Test School Number One		03/28/20
Peter	Tom	115566	115566	02/28/1993	01	Test School Number One	Pete M. Anderson/	- NO IEP
Smith	Johny				01	Test School Number One		- NO IEP
Student	New			03/05/1993	01	Test School Number One		- NO IEP

Running Standard Reports

Your district has the option of creating any number of standard reports that can be accessed from the **Reports** menu. These reports cannot be edited by the user, but will produce results based on the latest data in the Emerge database. For example, they can be used for Medicaid and any number of state and federal requirements.

Managing Caseloads

As students move between schools and work with different providers, caseloads change. All users except the Case Manager level can assign and change caseloads. However, they may only adjust caseloads of staff at their buildings or under their supervision.

To assign students to providers, or change a caseload, follow these steps:

1. Go to the **Manage** main menu by clicking on the **Manage** tab in the upper right of the screen.
2. Click **Assign Student** or **Unassign Student** in the submenu on the left side of the screen.
3. Select the district and school and click **View Students** to assign or unassign providers for a student; click **View Case Managers** to assign or unassign students to each Case Manager.
4. Choose a student from the student dropdown list.
5. Use the **Unassign** and **Assign** buttons to move Case Managers to the assigned or unassigned columns.

Student Records

Manage Students:

- » Assign Student
- » Unassign Student
- » View Students

- » Add Student
- » Edit Student
- » Delete Student
- » Transfer Student
- » Promote Student

Parent Records

Manage Parents:

- » Add Parent
- » Edit Parent

Student - Case Manager Assignment		
Students	Case Managers	
	Assigned	Unassigned
<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Mac P. John ▾</div>	<div style="border: 1px solid #ccc; padding: 2px; min-height: 50px;">Judy Test Teacher Teacher</div>	<div style="border: 1px solid #ccc; padding: 2px; min-height: 50px;"></div>
	<div style="background-color: #f4a460; padding: 5px; display: inline-block;">Unassign >></div>	<div style="background-color: #f4a460; padding: 5px; display: inline-block;"><< Assign</div>
To select two or more items, hold down control key (command key on a Macintosh) while clicking mouse.		

Managing Student and Parent Records

Due to the highly critical nature of these activities, they are limited to the Administrator and Director user levels. Any student IEP may be removed and edited, along with all associated demographic information. Further, student records can be made accessible to different schools as these students attend them.

Student and Parent Demographic Information

Each student in Emerge has a set of personal demographic data and parent records, as well as IEP documentation. A subset of this information appears at the top of every IEP form – the basic demographic fields. Your district may import this data on a regular basis from your main student information system (such as SASIxp) or enter it using the Emerge student information data entry screen. Parent information is edited in the same way.

Adding or Editing a Student Record

1. Go to the **Manage** main menu by clicking on the **Manage** tab in the upper right of the screen.
2. Click **Add Student** or **Edit Student** in the submenu on the left side of the screen.
3. Fill in or change information in the student fields.
4. Click the **Save** button at the bottom of the screen.

Deleting a Student Record

1. Go to the **Manage** main menu by clicking on the **Manage** tab in the upper right of the screen.
2. Click the **Delete Student** link in the submenu on the left side of the screen.
3. Click the **Delete Student** button at the bottom of the new window.

Adding or Editing a Parent Record

1. Go to the **Manage** main menu by clicking on the **Manage** tab in the upper right of the screen.
2. Click **Add Parent** or **Edit Parent** in the submenu on the left side of the screen.
3. Click on a student in the list.
4. Fill in or change information in the parent fields.
5. Click the **Save** button at the bottom of the screen.

Transferring and Promoting Students

Student populations are very fluid; transfers between schools and grade levels can occur any time of year. Since schools may only view student records for students attending their schools, it is important to transfer a student's records when he or she moves to a new school. The same requirement applies within a school when a student moves into a new grade: The records must be transferred.

Transferring a Student

1. Go to the **Manage** main menu by clicking on the **Manage** tab in the upper right of the screen.
2. Click **Transfer Student** in the submenu on the left side of the screen.
3. Select the desired district and school and click **View Students**.
4. Locate the student and select the receiving school by using the dropdown list to the far right of the student's name; repeat for each student.
5. Click **Transfer Student** at the bottom of the screen.

Transfer Student(s)

Select a District/School and Grade (to transfer student(s) from):

<div style="display: flex; justify-content: space-between;"> <div style="border-bottom: 1px solid gray; width: 80%;"> Zone 1 - Demo School District #1 </div> <div style="border-bottom: 1px solid gray; width: 15%;"> Grade: </div> <div style="width: 5%;"></div> </div> <div style="display: flex; justify-content: space-between; border-top: 1px solid gray;"> <div style="border-bottom: 1px solid gray; width: 80%;"> Boyd Elementary School (for demo) </div> <div style="border-bottom: 1px solid gray; width: 15%;"> All </div> <div style="width: 5%;"></div> </div>	<div style="border: 1px solid gray; background-color: #f4a460; padding: 2px; font-weight: bold; font-size: x-small; color: white;">View Students</div>
---	--

List of Student(s)

Last Name	First Name	Student ID (District)	Student ID (State)	Date of Birth	Grade Level	School (to be transferred to)	Transfer
Coad	Peter	112233	111222	08/26/1995	P - Pre K	Boyd Elementary School (for demo)	<input checked="" type="checkbox"/>
Cook	Samantha	257898	257898	03/29/1990	06	Boyd Elementary School (for demo)	<input type="checkbox"/>
Cronin	Steven	842464	842464	10/16/1989	06	Boyd Elementary School (for demo)	<input type="checkbox"/>
Czeiner	Crystal	275104	275104	07/14/1990	06	Boyd Elementary School (for demo)	<input type="checkbox"/>
Day	Gren	202020	202020	03/07/1990	06	Boyd Elementary School (for demo)	<input type="checkbox"/>
Edwards	Michael	907886	30633	08/03/1990	06	Boyd Elementary School (for demo)	<input type="checkbox"/>
Gray	Andrew	781297	781297	01/20/1990	06	Boyd Elementary School (for demo)	<input type="checkbox"/>

Transfer Student

Promoting Students

The following steps may only be used to promote a group of students. If you wish to move one student at a time to a new grade, go to the student demographic information screen and change the grade level. Click **Edit Student** to find the screen. To promote a group:

1. Go to the **Manage** main menu by clicking on the **Manage** tab in the upper right of the screen.
2. Click **Promote Student** in the submenu on the left side of the screen.
3. Select the desired school and grade promotion and click **Promote Student**.

List of Schools

School Type: Elementary School

Select School(s):

Select Grade(s):

<input type="checkbox"/> E - ECE--->P - Pre K	<input type="checkbox"/> P - Pre K--->K - Kdg	<input type="checkbox"/> K - Kdg--->01
<input type="checkbox"/> 01--->02	<input type="checkbox"/> 02--->03	<input type="checkbox"/> 03--->04
<input type="checkbox"/> 04--->05	<input type="checkbox"/> 05--->06	

Promote Student

Managing System Users

Coordinators, Administrators, and Directors have the ability to manage the records and user levels of staff they direct. Although it may be more convenient to give your user name and password to support staff needing access, we very strongly advise against this: Create user names and passwords with appropriate access for staff instead.

Adding and Editing a User

1. Go to the **Admin** main menu by clicking on the **Admin** tab in the far upper right of the screen.
2. Click **Add User** or **Edit User** in the submenu on the left side of the screen.
3. Make changes or enter initial data in the displayed user fields.
4. If you are editing a user, assign rights to view student records by assigning schools to the user: Click the **Edit School List** button; check off the desired schools and click **Save**.
5. If you are adding a user, you just need to select a school from the dropdown menu.
6. Click the **Save** button at the bottom of the data entry screen.

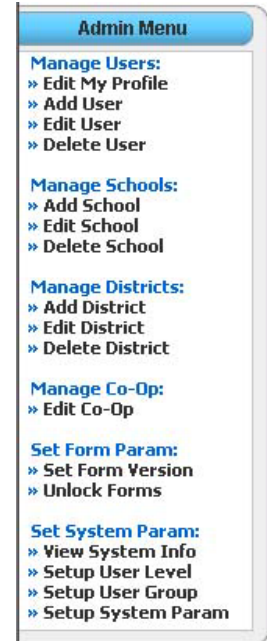
Deleting a User

1. Go to the **Admin** main menu by clicking on the **Admin** tab in the far upper right of the screen.
2. Click **Delete User** in the submenu on the left side of the screen.
3. Click on the last name of the user to remove.
4. Click the **Delete User** button at the bottom of the screen.

Managing School Information

Each school in the system has basic information such as addresses and phone numbers. Adding, editing, and deleting school information is virtually identical to working with user information.

Follow the steps used for managing system users, but use the **Manage Schools** section of the **Admin** submenu. The school is the primary administrative unit to which students and users are attached.



Setting Form Preferences

Emerge stores all forms as templates. When a student form is selected, information from the EmERGE database fills in each field; EmERGE remembers how the form was filled out and puts the data back in the form when the form is viewed. When displaying the set of forms in a student's IEP, you can determine which version of the form will be used, if the form will be used, what order it will appear in, and the date it will be available for system use.

Form Title

By clicking on this link, you can view characteristics of this form and change the Form Name.

Version

This is the version of the form in use. All forms are kept in the system to preserve IEP archives. As new forms are brought in, they receive later version numbers. For example, you may have five versions of the Parental Involvement form, but only use one in new IEPs. However, you must keep all four previous versions in order to view the old IEPs.

Select

Click this box to make the form show up on the forms list in the IEP.

Form Order

Type in a number to indicate which order the form will appear in the forms list.

Start Date

Type in the date you want the form to be available in IEPs.

IEP Forms History				
Form Title	Version	Select	Form Order	Start Date
IEP Front Page	1	<input checked="" type="checkbox"/>	<input type="text" value="2"/>	<input type="text" value="01/01/2003"/>
P.E.T. Meeting Minutes	1	<input checked="" type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="01/01/2003"/>
Present Level of Educational P...	1	<input checked="" type="checkbox"/>	<input type="text" value="3"/>	<input type="text" value="01/01/2003"/>
Parental Involvement	1	<input checked="" type="checkbox"/>	<input type="text" value="4"/>	<input type="text" value="01/01/2003"/>
Modifications to the Maine Edu...	1	<input checked="" type="checkbox"/>	<input type="text" value="5"/>	<input type="text" value="01/01/2003"/>
Transition Plan	1	<input checked="" type="checkbox"/>	<input type="text" value="6"/>	<input type="text" value="01/01/2003"/>
Behavior Intervention Plan	1	<input checked="" type="checkbox"/>	<input type="text" value="7"/>	<input type="text" value="01/01/2003"/>
I.E.P. Goals and Objectives	1	<input checked="" type="checkbox"/>	<input type="text" value="8"/>	<input type="text" value="01/01/2003"/>
I.E.P. Goals and Objectives Ve...	2	<input checked="" type="checkbox"/>	<input type="text" value="8"/>	<input type="text" value="02/01/2003"/>

Changing System Parameters

Emerge has a security feature that will automatically log a user off after a set period of time in minutes. The example below shows 60 minutes. The system administrator will also place general contact information to address technical problems reported by users. Access these settings by clicking **Set System Parameters** in the **Admin** submenu.

System Idle Time:

Solving System Problems

Chapter 5

I cannot login from the login screen.

1. Review and repeat login instructions on page three of this manual.
2. Close your Internet browser.
3. Make sure you are using Microsoft Internet Explorer 5.5 or higher.
4. Open your browser and login again.
5. If this does not work, make sure you are using the correct lower and upper case letters for your password.

I cannot see my caseload.

1. Review and repeat login instructions on page three of this manual.
2. If this does not work, close and reopen your browser, Microsoft Internet Explorer 5.5 or higher.
3. Next, click **Internet Tools** in the upper left menu of Microsoft Internet Explorer. Select **Internet Options**.
4. Choose the **Content** tab and click the **Publishers** button.
5. Under the **Trusted Publishers Section**, highlight any listing that contains the name **Healex**. Then press the **Remove** button. Do this for each listing with the word **Healex**.
6. Press the **OK** button.
7. Press the next **OK** button at the bottom of the window. Close every window in the browser.
8. Open the browser again and login.

The IEP looks wrong.

1. Read the student name in the upper left part of the screen. If it is not the desired student, click **View IEP** on the main menu and select the proper student from your caseload list.
2. If you have the correct student, click **View All IEPs** in the **View IEP** submenu on the left side of the screen. Find the desired IEP in the IEP history table and click **Show IEP**.
3. If you have the correct year, select the desired form from the forms list on the left. Next, make sure you also select the correct form when the form summary list appears in the form display window on your right.

I cannot edit the form.

1. Ensure that you have the correct IEP by clicking on **Show All IEPs** in the submenu on the left of the screen. Click on **Show IEP** for the desired year in the IEP listing. Make sure the IEP is not in a closed status.
2. If this does not work, choose the correct year from the IEP listing found by clicking on **Show All IEPs**. Choose the desired form. Choose the correct form listing from the forms index. Click the **Edit Form** button when the form is displayed.

I cannot save the form.

1. Make sure that you have filled in all required fields. Click the **Save** button.
2. If this does not work, refresh/reload your browser and start over.
3. Click the **Save** button.

Technical Support

For questions on how to use Emerge, or any technical problems, give us a call between 9:00 a.m. and 5:00 p.m. (M-F) EST: 888-637-9997

Questions about the review of your IEP or the status of a student, or requests for programming changes to Emerge, should be directed to your district director of special education.

Healex Systems

11 Middleton Drive
Wilmington, DE 19808
Voice: 888-637-9997
Fax: 302-235-5754

techsupport@healex.com
www.healex.com