

# Set up User Banks

Special Services provides the Present Levels, Goals, Objectives and Accommodations banks in which users can store a group of phrases repeatedly used to complete information on the IEP 6 Measurable Annual Goals and IEP 12 Statewide and District Wide Testing pages of the Individualized Education Plan (IEP) form.

Each bank consists of the following pieces:

- **Categories** – Describes the type of phrases you might use. For example, for the Objectives bank, you create a category called Math under which you would create phrases (items) that describe the student’s objectives or bench marks for achieving a particular goal.
- **Items** – Defines the phrase you would use on the IEP. For example, in the Math category in the Objectives bank, you create an item that states a specific bench mark or objective, such as “The student will identify/name/state value for coins.”

You can create and maintain categories and items in the User Banks for those phrases you commonly use in the indicated sections of the IEP form. Some categories, and their associated items, are defined by your district and can only be edited by users assigned an administrator role. These categories display shaded on the User Bank Setup screen, as shown in the image below. You can use items contained in the district-defined category on an IEP form as well as the ones you create in the User Banks.

District-defined categories

Category Name	Order	Hide	View Items	Delete
Presentation	1	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Response	2	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Setting	3	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Timing/Scheduling	4	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Math Accommodations		<input type="checkbox"/>	<a href="#">view items</a>	<input type="checkbox"/>
Reading Accommodations		<input type="checkbox"/>	<a href="#">view items</a>	<input type="checkbox"/>

[Add New Category](#)

## Add Categories to User Banks

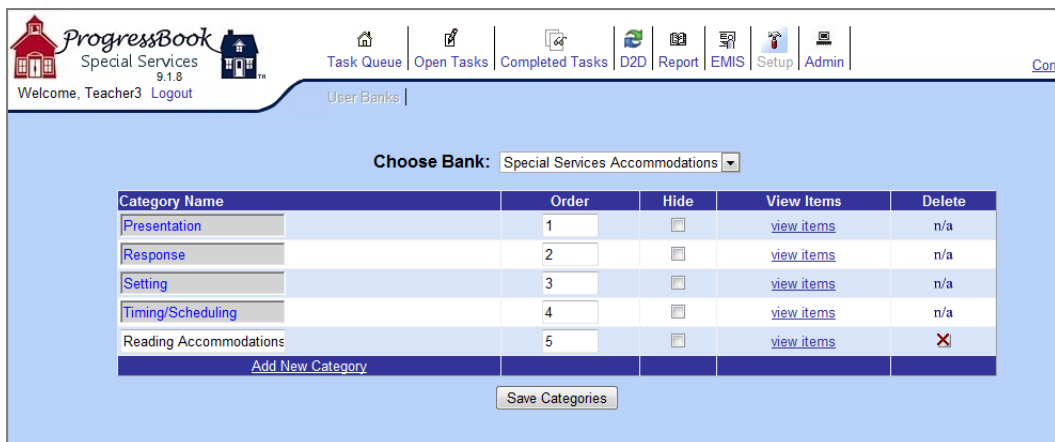
You can add categories to the Accommodations, Goals, Objectives or Present Levels banks. Once you create a new category, you can enter the items—those phrases you would use to complete the selected section on the IEP form—for the category. You can access the User Bank Setup screen from the Edit Section screen when importing phrases onto the IEP or by clicking Setup from the toolbar on the Special Services toolbar.


1. On the Web site banner, click **Setup** , and then click **User Banks**.

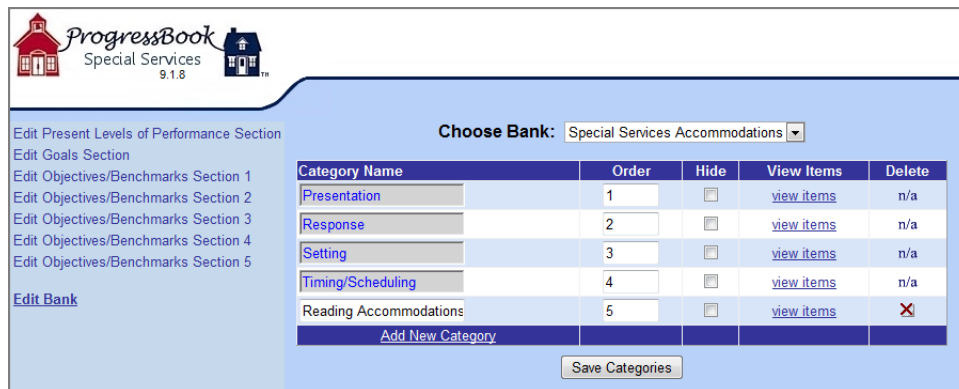
or


From the Edit Sections screen in an IEP, click **Edit Bank**.

The User Bank Setup screen displays with the categories for the Special Services Accommodations selected by default. The images below show the User Bank Setup screen when accessed from the Setup screen and the Edit Section screen respectively.



Category Name	Order	Hide	View Items	Delete
Presentation	1	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Response	2	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Setting	3	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Timing/Scheduling	4	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Reading Accommodations	5	<input type="checkbox"/>	<a href="#">view items</a>	



Category Name	Order	Hide	View Items	Delete
Presentation	1	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Response	2	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Setting	3	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Timing/Scheduling	4	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Reading Accommodations	5	<input type="checkbox"/>	<a href="#">view items</a>	

2. Select the appropriate **bank** to edit in the Choose Bank list:
  - **Special Services Accommodations** – Used in the Detail of Accommodations sections of IEP 12 Statewide and District Testing.
  - **Special Services Goals** – Used in the Measurable Annual Goal section of IEP 6 Measurable Annual Goals.
  - **Special Services Objectives** – Used in the Benchmarks/Objectives sections of IEP 6 Measurable Annual Goals.
  - **Special Services Present Levels** – Used in the Present Levels of Performance section of IEP 6 Measurable Annual Goals.
3. Click the **Add New Category** link at the bottom of the Categories grid.

A blank field appears at the bottom of the Categories grid.

Category Name	Order	Hide	View Items	Delete
Math		<input type="checkbox"/>	<a href="#">view items</a>	n/a
Reading		<input type="checkbox"/>	<a href="#">view items</a>	n/a
Study Skills		<input type="checkbox"/>	<a href="#">view items</a>	n/a
Gross Motor				

[Add New](#) [Save Categories](#)

4. Enter a **name** for the new category in the Category Name field.
5. Click **Add New**.

The new category displays in the Categories grid in alphabetical order by the category name. The Order, Hide, View Items and Delete columns become available for the category.


Category Name	Order	Hide	View Items	Delete
Gross Motor		<input type="checkbox"/>	<a href="#">view items</a>	
Math		<input type="checkbox"/>	<a href="#">view items</a>	n/a
Reading		<input type="checkbox"/>	<a href="#">view items</a>	n/a
Study Skills		<input type="checkbox"/>	<a href="#">view items</a>	n/a
<a href="#">Add New Category</a>				

[Save Categories](#)

6. You can perform any of the following actions:
  - To change the sort order of the category, enter a **number** in the Order column that represents the position in which you want the category to appear. For example, entering “1” would place the category at the top of the list.
  - To hide a category so that it does not display in the Category list on the Edit Section screen when you are importing phrases to an IEP form, select the **check box** in the Hide column.
7. If you changed the sort order or chose to hide the category, click **Save Changes**.
8. Once you create a category, enter new items you want to store for the category. See “*Add Items to Bank Categories*” on page 60.

## Delete Categories from User Banks

You can only delete those categories you created from the Accommodations, Goals, Objectives or Present Levels banks. The categories that appear in the shaded cells in the Categories grid are defined by your district; you cannot delete them. When you delete a category, all of the items associated to the category are also deleted.

1. On the User Bank Setup screen, select the appropriate **bank** from the Choose Bank list.
2. Click  in the row of the category you want to delete.

The message displays, “Are you sure you want to delete this category? This will permanently delete all of the items and user settings associated with this category.”

3. Click **OK** to confirm the deletion.

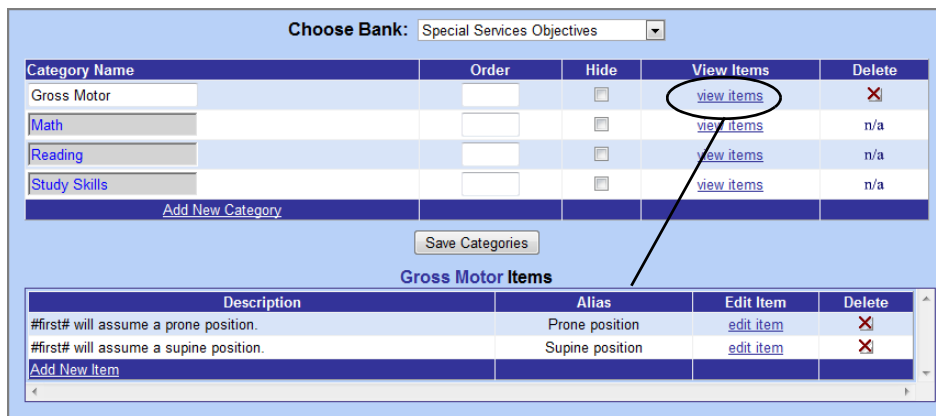
The category no longer displays in the grid on the User Setup Page.

## Add Items to Bank Categories


For each custom category, you can create items to define the phrases you want to use in certain sections of the IEP form. You can only add items for categories you have created. The categories that appear in the shaded cells on the Categories grid are defined by your district; you can view, but not edit, the items for these categories.

1. On the User Bank Setup screen, select the appropriate **bank** from the Choose Bank list.
2. Click the **view items** link in the row for the category to which you want to add a new item.

The Items grid appears below the Categories grid and displays the items, if any, associated to category.





Choose Bank: Special Services Objectives

Category Name	Order	Hide	View Items	Delete
Gross Motor		<input type="checkbox"/>	<a href="#">view items</a>	
Math		<input type="checkbox"/>	<a href="#">view items</a>	n/a
Reading		<input type="checkbox"/>	<a href="#">view items</a>	n/a
Study Skills		<input type="checkbox"/>	<a href="#">view items</a>	n/a

[Add New Category](#)

[Save Categories](#)

### Gross Motor Items

Description	Alias	Edit Item	Delete
#first# will assume a prone position.	Prone position	<a href="#">edit item</a>	
#first# will assume a supine position.	Supine position	<a href="#">edit item</a>	

[Add New Item](#)

3. Click the **Add New Item** link.

The Add Item window for the category displays.

4. On the Items screen, enter a short **description** for the new item in the Alias field.



*Note: The alias displays in the Items list on the Edit Section screen when you are adding the items to the IEP form. If you leave this field blank, the system displays the first several characters in the Description field. You would use the Alias field to distinguish an item if several of the items for this category begin similarly.*

5. Enter the specific **phrase** you want to use for this category and bank in the Description field.



*Note: Special Services provides codes you can use in the Description field which will insert the student's name or the appropriate pronoun in the phrase when you import it on an IEP form. See "Bank Codes" on page 62.*

6. You can perform either of the following optional steps while creating a new item:
  - To check the spelling for the phrase you entered in the Description field, click **Check Spelling**.
  - To associate this item to more than one category, select the **check box** for the applicable categories in the Assorted Categories area.
7. Click **Save**.
8. To create another item, click the **Create New Item** link, and then repeat steps 4 through 7.
9. When you are done creating new items, click **Close** to return to the User Setup Page screen.
10. To view the items you created in the Items grid, click **view items** for the category in which you created the items.

## Bank Codes

Use the codes listed in the table below to create phrases for items. When the item is added to an IEP form, the student's name or the appropriate pronoun is inserted in the position of the code.

Code	Description	Example
#first#	Inserts student's first name.	<b>#first#</b> will make accurate measurements using appropriate tools and technology. <b>Sandra</b> will make accurate measurements using appropriate tools and technology.
#he/she#	Inserts a lowercase "he" or "she" as appropriate for the student.	When <b>#he/she#</b> is evidencing stress, #first# will initiate appropriate interactions without modeling or prompts. When <b>she</b> is evidencing stress, Sandra will initiate appropriate interactions without modeling or prompts.
#He/She#	Inserts a mixed case "He" or "She" as appropriate for the student.	<b>#He/She#</b> will make accurate measurements using appropriate tools and technology. <b>She</b> will make accurate measurements using appropriate tools and technology.
#him/her#	Inserts a lowercase "him" or "her" as appropriate for the student.	#first# is able to answer direct questions when they are signed and spoken to <b>#him/her#</b> . Sandra is able to answer direct questions when they are signed and spoken to <b>her</b> .
#Him/Her#	Inserts a mixed case "Him" or "Her" as appropriate for the student.	N/A
#his/hers#	Inserts a lowercase "his" or "hers" as appropriate for the student.	#first# will identify which work area is <b>#his/hers#</b> . Sandra will identify which work area is <b>hers</b> .
#His/Hers#	Inserts a mixed case "His" or "Hers" as appropriate for the student.	N/A
#his/her#	Inserts a lowercase "his" or "her" as appropriate for the student.	#first# will alphabetize <b>#his/her#</b> spelling/vocabulary words with 80% accuracy. Sandra will alphabetize <b>her</b> spelling/vocabulary words with 80% accuracy.
#His/Her#	Inserts a mixed case "His" or "Her" as appropriate for the student.	<b>#His/Her#</b> regular classroom teacher will notify the special education teacher of any behavioral issues. <b>Her</b> regular classroom teacher will notify the special education teacher of any behavior issues.

## Edit Items in Bank Categories

You can only edit the items in the categories you created. The categories that appear in the shaded cells in the Categories grid are defined by your district; you can view, but not edit, the items in these categories.

1. On the User Bank Setup screen, select the appropriate **bank** from the Choose Bank list.
2. Click the **view items** link in the row for the category in which you want to edit an item.

The Items grid appears below the Categories grid and displays the items associated to category.


3. Click the **edit item** link in the row of the item you want to edit.
4. On the Item window, you can perform any of the following actions:
  - Modify the information in the Alias and Description fields.
  - Associate the item to additional categories by selecting the **check box** for the appropriate categories in the Associated Categories area.
  - Delete the item by clicking **Delete**.
  - Enter a new item by clicking the **Create New Item** link, and then completing the fields on the Items window. See “Add Items to Bank Categories” on page 60.
5. Click **Save** to store any changes you made to the current item.
6. If you want to navigate to the other items associated to the selected category, click **Previous** or **Next** as appropriate.
7. Click **Close** to return to the User Bank Setup screen.

## Delete Items from Bank Categories

You can only delete items from the categories you created. The categories that appear in the shaded cells in the Categories grid are defined by your district; you can view, but not delete, the items in these categories.

1. On the User Bank Setup screen, select the appropriate **bank** from the Choose Bank list.
2. Click the **view items** link in the row for the category from which you want to delete an item.

The Items grid appears below the Categories grid and displays the items associated to the category.

3. Click  in the row of the item you want to delete.

A message displays that reads, “Are you sure you want to delete this Item?”

4. Click **OK** to confirm the deletion.

The item no longer displays in the Items grid for the category.