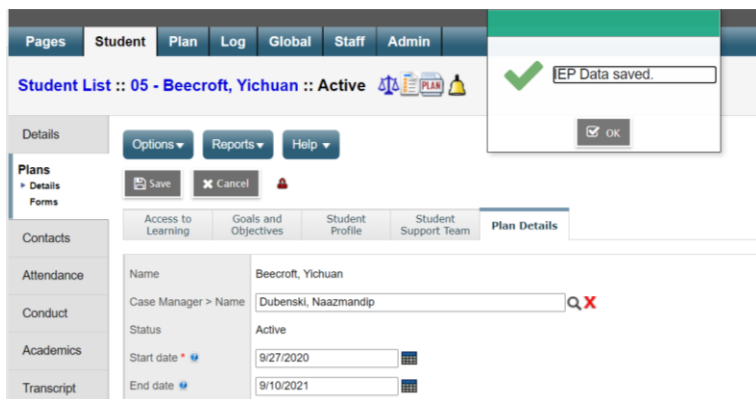


## Adding a New Competency Base IEP Shell

Case managers may need to create a Competency Base IEP Shell when there is a BC IEP shell already in place.

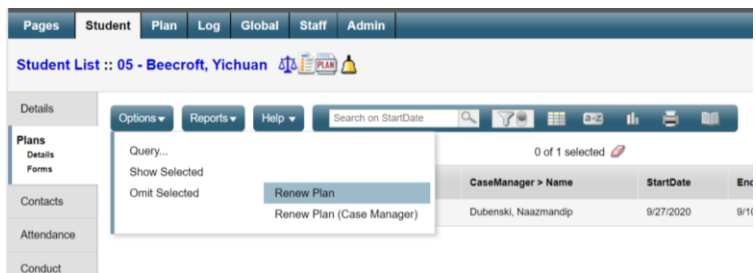
**\*\*\* Ensure you are working in - Student Services, School View**

1. Open active BC IEP
2. Click on Plan Details Tab
3. Change end date to Tomorrow's date & click save



The screenshot shows the 'Plan Details' tab for a student named Beecroft, Yichuan. The 'End date' is set to 9/10/2021. A confirmation dialog box is open, stating 'IEP Data saved.' with an 'OK' button.

4. Click on Plans Side Tab



The screenshot shows the 'Plans' side tab with a search filter applied to 'StartDate'. A table shows one result for 'Dubenski, Naazmandip' with a start date of 9/27/2020. A 'Renew Plan' button is visible.

CaseManager > Name	StartDate	Enc
Dubenski, Naazmandip	9/27/2020	9/11

5. Go to Options and select "Renew Plan"
6. Click on the magnifying glass beside "Student"
7. Check the box beside desired student name, Click "OK"
8. Enter a start date 2 days in the future
9. Enter an end date
  - Click on the Calendar
  - Select June 30<sup>th</sup> in the current school year

10. Enter Plan Name in the standard format

- 61-IEP-(current year)

11. Click RUN

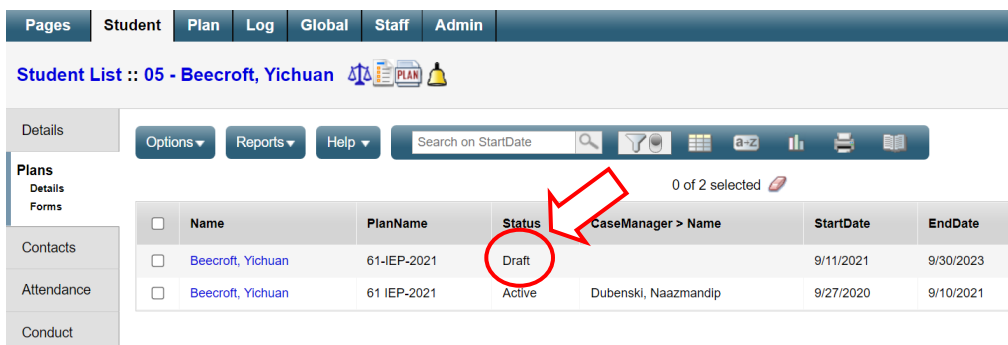
An alert will pop up to confirm the shell was created

12. Close the pop-up window

13. Use the filter for “All Records” to go to the shell you have created. It will be in “Draft” status:

- Click on Student List
- Filter for “All Records”
- Click on Student Name
- Click Plans side tab
- Click on the Plan Name to open it

14. Click “Save”



The screenshot shows a web application interface with a navigation bar at the top containing tabs for Pages, Student, Plan, Log, Global, Staff, and Admin. Below the navigation bar, the page title is "Student List :: 05 - Beecroft, Yichuan". A search bar is present with the text "Search on StartDate". A table with 7 columns is displayed: Name, PlanName, Status, CaseManager > Name, StartDate, and EndDate. The first row of the table has the following values: Name: Beecroft, Yichuan; PlanName: 61-IEP-2021; Status: Draft; CaseManager > Name: (blank); StartDate: 9/11/2021; EndDate: 9/30/2023. The second row has: Name: Beecroft, Yichuan; PlanName: 61 IEP-2021; Status: Active; CaseManager > Name: Dubenski, Naazmandip; StartDate: 9/27/2020; EndDate: 9/10/2021. The "Draft" status in the first row is circled in red, and a red arrow points to it from the right.

<input type="checkbox"/>	Name	PlanName	Status	CaseManager > Name	StartDate	EndDate
<input type="checkbox"/>	Beecroft, Yichuan	61-IEP-2021	Draft		9/11/2021	9/30/2023
<input type="checkbox"/>	Beecroft, Yichuan	61 IEP-2021	Active	Dubenski, Naazmandip	9/27/2020	9/10/2021

**\*\*The draft status will change to active automatically on the start date**