

# Set up User Banks

User Banks enable you to create and maintain a group of phrases repeatedly used to complete certain sections of the Individualized Education Plan (IEP) form. In Special Services, each bank consists of the following pieces:

- **Categories** – Describes the type of phrases you might use. For example, for the Accommodations bank, you might have a category called Environment under which you would create phrases, or items, concerning the student's environment.
- **Items** – Defines the phrase you would use on the IEP. For example, for the Environment category in the Accommodations bank, you might have an item called “adaptive furniture” and another item called “small group.”

Some categories, and their associated items, are defined by your district and can only be edited by a user with administrator status. You can create your own categories and items to supplement those provided by your district.

## District-defined categories

ProgressBook Special Services 9.1.0  
Welcome, Teacher3 Logout

Task Queue Open Tasks Closed Tasks D2D Report EMIS Setup Admin

User Banks |

Choose Bank: SSEM Accommodations

Category Name	Order	Hide	View Items	Delete
Environment	1	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Format	2	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Response	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](#)

Save Categories

Category changes saved.

## Add Categories to User Banks

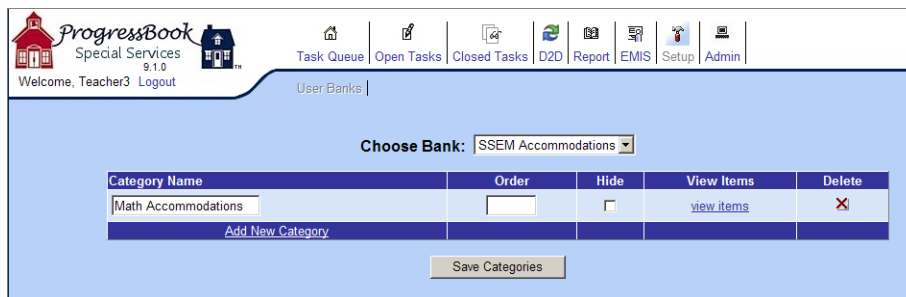
You can add categories to the Accommodations, Goals, Objectives or Present Levels banks. Once you create a new category, you can enter the items—those phrases you would use to complete the selected section on the IEP form—for the category. You can access the User Banks Setup screen from the Edit Section 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**.

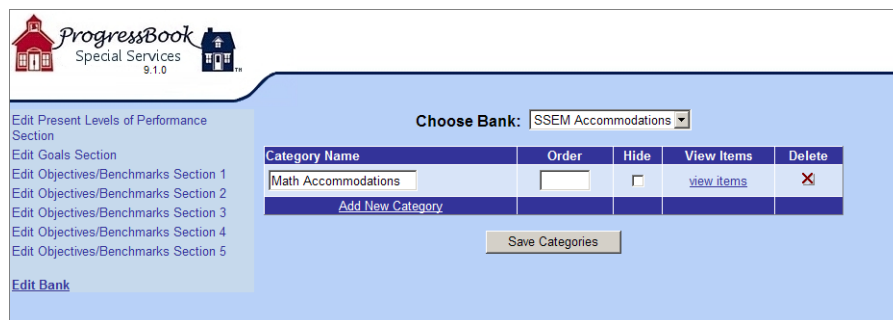
The User Banks Setup screen displays with the categories for the SSEM Accommodations selected by default.




Category Name	Order	Hide	View Items	Delete
Math Accommodations	<input type="text"/>	<input type="checkbox"/>	<a href="#">view items</a>	

[Add New Category](#)

**User Banks Setup - From Setup Screen**



Category Name	Order	Hide	View Items	Delete
Math Accommodations	<input type="text"/>	<input type="checkbox"/>	<a href="#">view items</a>	

[Add New Category](#)

**User Banks Setup - From Edit Sections Screen (IEP)**

2. Select the appropriate **bank** to edit in the Choose Bank list:
  - **SSEM Accommodations** – Used in the Detail of Accommodations sections of IEP 12 - Statewide and District Testing.
  - **SSEM Goals** – Used in the Measurable Annual Goal section of IEP 6 - Measurable Annual Goals.
  - **SSEM Objectives** – Used in the Benchmarks/Objectives sections of IEP 6 - Measurable Annual Goals.
  - **SSEM 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.

Choose Bank: SSEM Accommodations

Category Name	Order	Hide	View Items	Delete
Math Accommodations	<input type="text"/>	<input type="checkbox"/>	<a href="#">view items</a>	<input type="checkbox"/>
Reading Accommodations	<input type="text"/>	<input type="checkbox"/>	<a href="#">view items</a>	<input type="checkbox"/>

[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.

Choose Bank: SSEM Accommodations

Category Name	Order	Hide	View Items	Delete
Math Accommodations	<input type="text"/>	<input type="checkbox"/>	<a href="#">view items</a>	<input type="checkbox"/>
Reading Accommodations	<input type="text"/>	<input type="checkbox"/>	<a href="#">view items</a>	<input type="checkbox"/>


[Add New Category](#)

[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 134.

## 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.

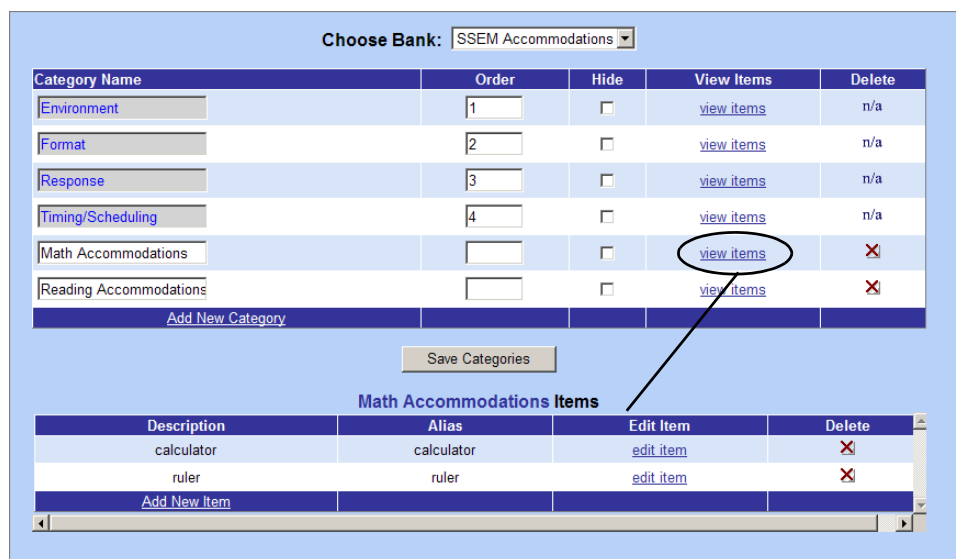
The category no longer displays in the grid on the User Setup Page.

## 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.



The screenshot shows the 'User Bank Setup' interface. At the top, there is a 'Choose Bank:' dropdown menu set to 'SSEM Accommodations'. Below this is a 'Categories' grid with the following data:

Category Name	Order	Hide	View Items	Delete
Environment	1	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Format	2	<input type="checkbox"/>	<a href="#">view items</a>	n/a
Response	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>	
Reading Accommodations		<input type="checkbox"/>	<a href="#">view items</a>	

Below the 'Categories' grid is a 'Save Categories' button. Underneath is the 'Math Accommodations Items' grid:

Description	Alias	Edit Item	Delete
calculator	calculator	<a href="#">edit item</a>	
ruler	ruler	<a href="#">edit item</a>	

The 'view items' link for 'Math Accommodations' in the Categories grid is circled in red, and a line points from it to the 'Math Accommodations Items' grid.

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

The Add Item window for the category displays.

- 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.*

- 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 136.*

- 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.
- Click **Save**.
- 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 the category 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.	<b>#First#</b> 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.	<b>#First#</b> 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.	<b>#first#</b> 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.

Choose Bank: SSEM Goals

Category Name	Order	Hide	View Items	Delete
Math Goals		<input type="checkbox"/>	<a href="#">view items</a>	
Reading Goals		<input type="checkbox"/>	<a href="#">view items</a>	

[Add New Category](#)

Save Categories

### Reading Goals Items

Description	Alias	Edit Item	Delete
#first# will demonstrate comprehension by answering a series o...	Comprehension	<a href="#">edit item</a>	
#first# will read at 90 wpm at 3rd grade level readability wit...	Accuracy	<a href="#">edit item</a>	

[Add New Item](#)


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 134.
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. Close the Items window to return to the User Setup Page 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.