1 2 3 CASEMIS

User's Guide
June 2003

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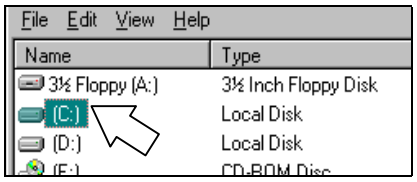
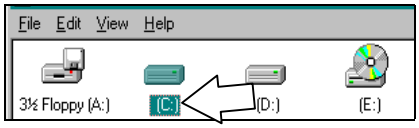
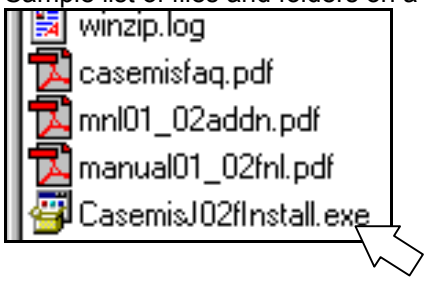
CASEMIS Software Installation

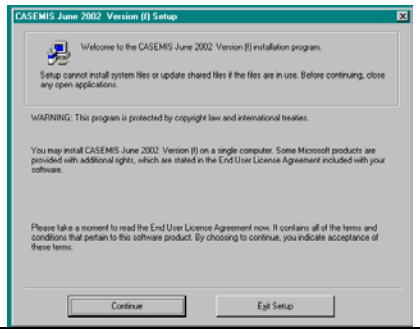
The downloaded CAlifornia Special Education Management Information System (CASEMIS) software automatically defaulted to C drive, unless you directed the download elsewhere. These directions assume that you downloaded on the C: drive

This section leads you to first, locate the application file then the installation. The CASEMIS software has on-screen direction to help you through this process. Please follow the directions.

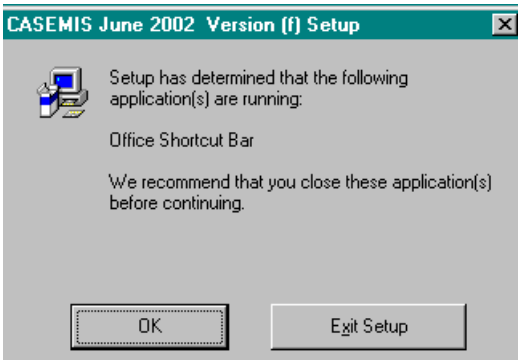
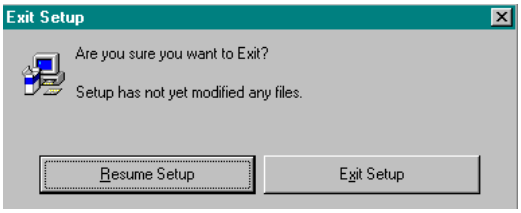
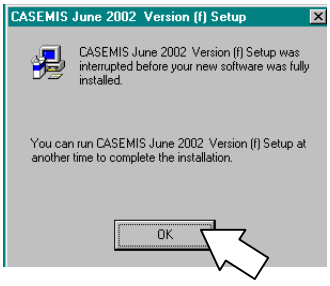
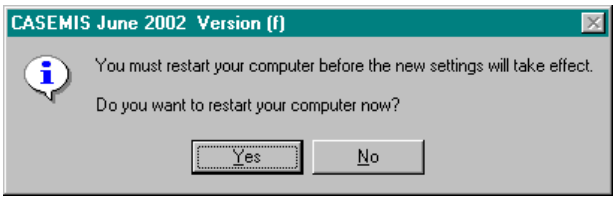
Before you begin,
1) If you are on a Local Area Network (LAN), check with you network administrator prior to installing the software, and
2) Exit any software programs you are currently using so only MS Windows is active.

Locating the Files to Install

Action	What is on the screen
Double click (depress the left mouse button two times, rapidly) on the desktop icon that represents **Your PC.**	
You will see a list of all the drives on your PC. Drives are shown as icons or in a list. **Double click** on the desktop icon that represents **Your C: drive.**	 **OR** 
The installation file name changes with each release. You can recognize the file name since it always begins with **Casemis** followed by a "**J**" or a "**D**" next is a two number year, such as, "**02**" then a letter for the version, for example, "**D**" and ending with "**Install.exe**" *J for June or D for December* *Two digit year* **CASEMIS** D02E **Install.exe** *Letter for release version* **Locate** the CASEMISX##XInstall.exe file. The name of this file changes with each release. More than one version may be released in a cycle. **Double click** the install.exe file.	Sample list of files and folders on a drive. 

Click Continue, located at the bottom of the screen. [Continue]	

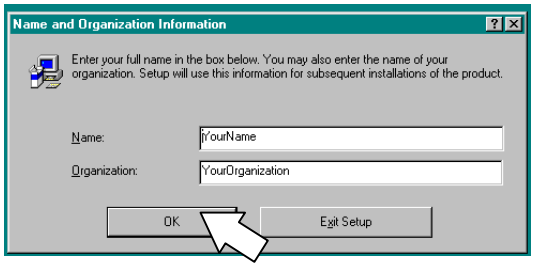
Applications Running Warning Appeared

If the adjacent warning appears for Windows Shortcut Bars, you may ignore the message. **Click OK** [OK]. **Proceed to "Continue Installation Process" section.** If you have any other applications running, you must click cancel the current installation. **Click Exit Setup.** [Exit Setup]	
Click Exit Setup. [Exit Setup] to abort installation.	
Click OK. [OK] to abort installation.	
It is NOT necessary to restart the computer. **Click No** Be sure to close all running application(s) prior to starting the installation process.	

Continue Installation Process

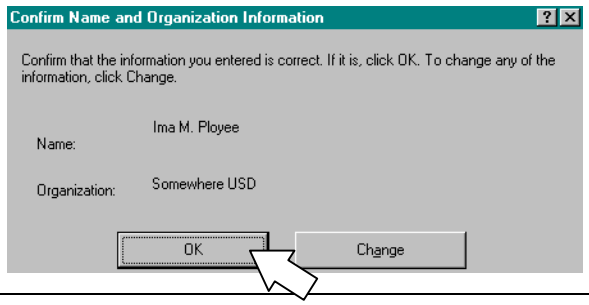
❑ Type your name and organization in the boxes provided. (If CASEMIS was previously installed on the PC this information will automatically be filled-in.)

Click OK. OK



Click OK. OK

If the information is incorrect
Click Change Change. You will be returned to the previous screen.



Targeted Drive for Installing Software

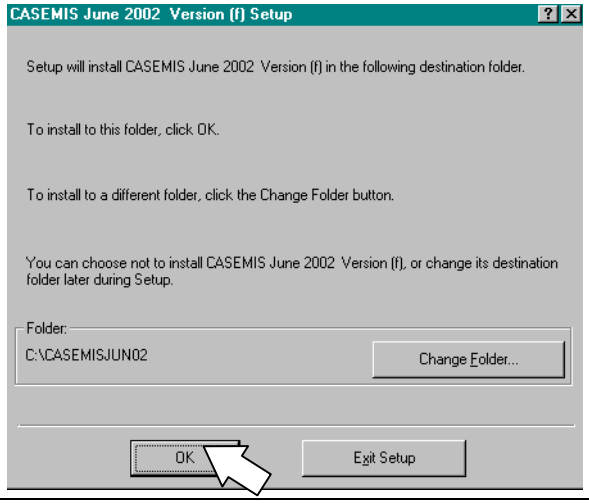
The message "Setup is searching for installed components." will flash

It is advised that you install as the software suggests. To install on the advised C: drive,

Click OK. OK. ***Proceed to "Start Installation" section.***

If you choose not to install as advised,

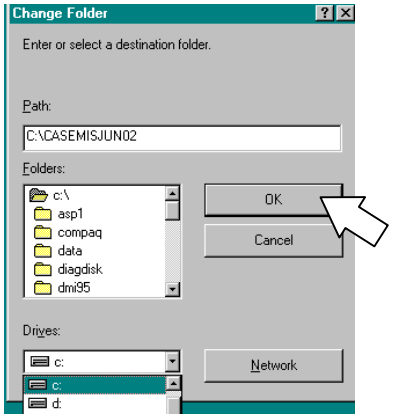
Click Change Folder Change Folder...

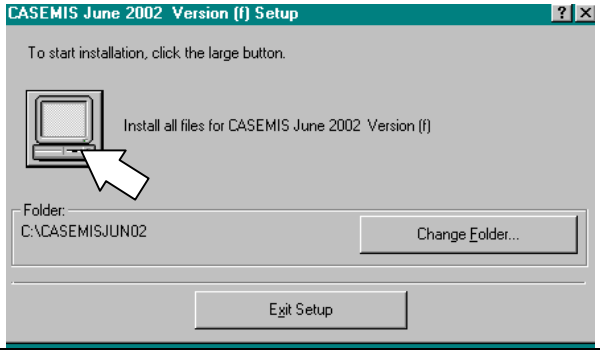
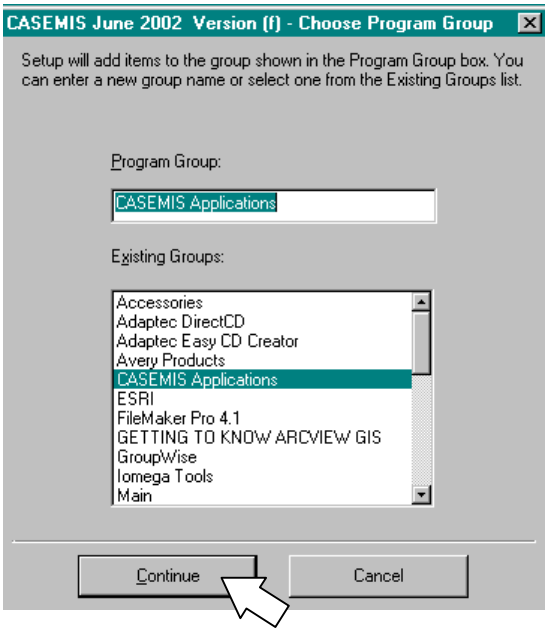
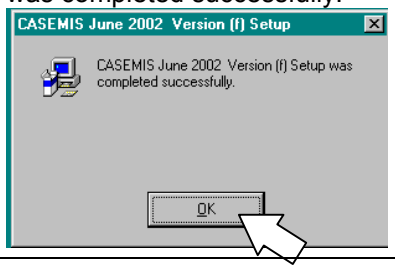
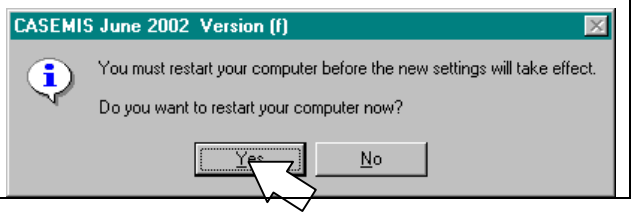


When the default C: drive is not used an alternate target drive may be designated. It is advised that you use the folder name suggested by the software.

Select target drive.
For example: Target drive is D:\. The Path box would indicate D:\CASEMISJUN02.

Click OK. OK



Start Installation	
Click the install button	
Click Continue Continue. These components are pre-selected. Do not alter any of the groups or items. A message will appear stating that "Setup is searching for necessary disk space."	
Click OK. OK	A message will appear that the software process was completed successfully. 
Click Yes Yes	

The Preliminary Stuff

Data Format

The CASEMIS User's Manual contains detailed information about the database structure, codes, and other information that are not covered in this guide. Make certain that you have ready access to an electronic or printed copy of the current CASEMIS User's Manual.

Before going any further… make certain that the data files (these will be referred to as tables) you were given for reporting end with **.dbf** .

If the files you were provided are named end with.txt or .csv, you must follow the instructions in the section named **Special Directions for TEXT and COMMA DELIMITED files** before proceeding. Running such text or comma delimited files without proper preparation may cause your computer to "freeze." Further information on data preparation is located in the CASEMIS User's Manual.

Next, verify that you have all of the required tables by referring to the next section, **Required Data**. If you are missing any of the tables, contact your local data manager before proceeding.

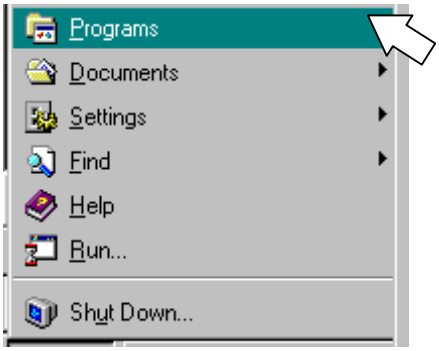
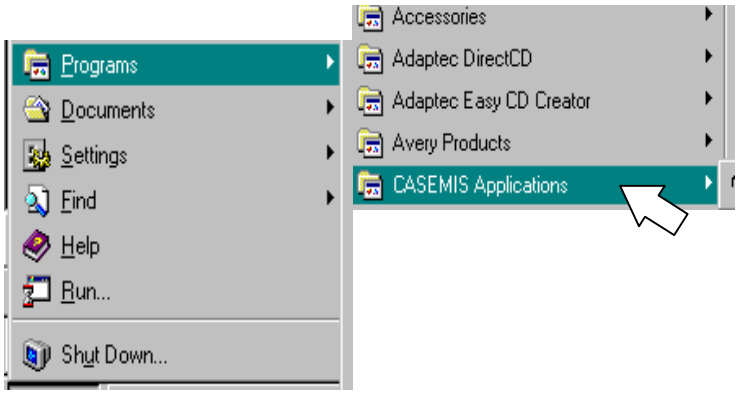
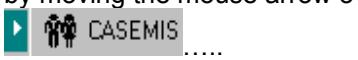
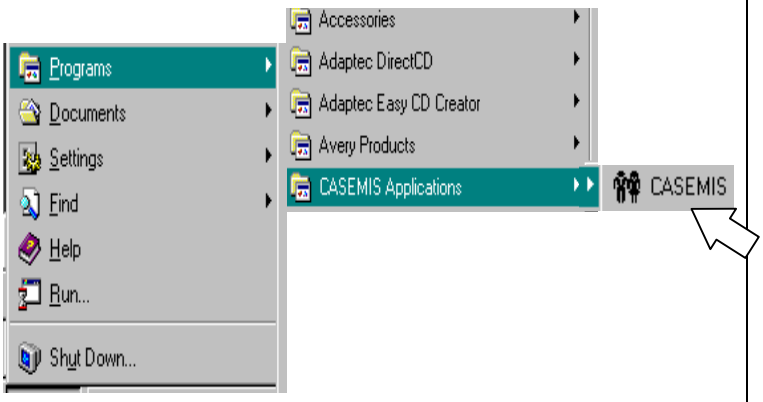
**** NOTE: Any reference to Alternate Assessment files should be ignored.***

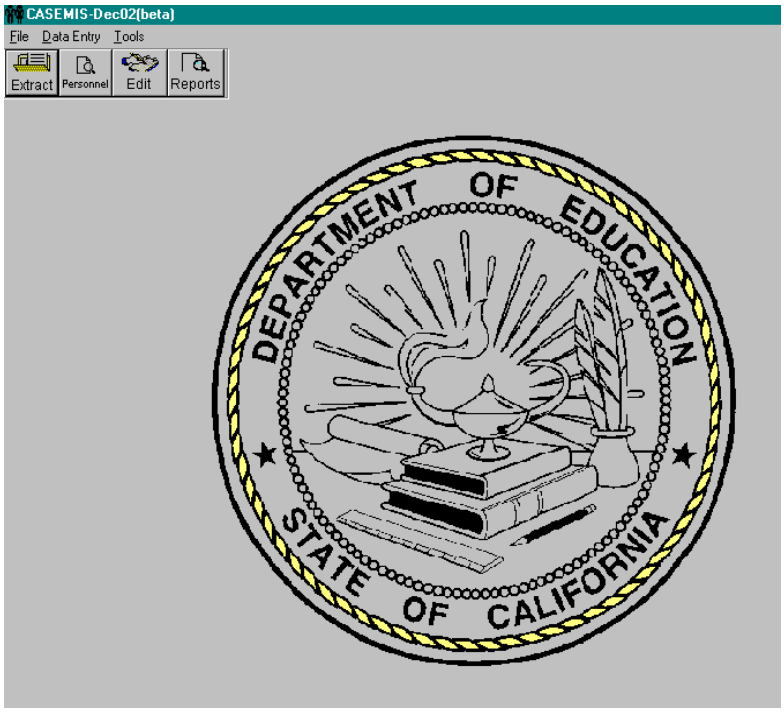
Required Data

Each reporting cycle requires, as a minimum the student data table.

Data Table	When Required	Number of Records to Submit Refer to the CASEMIS User's Manual for detailed information
A - Student Information	All cycles	One record for each child/student who received special education/related services.
B - Infant Services	All cycles when infants ages 0 – 2 are included in the accompanying Student Information data table	Limited to SELPAs who serve infants. At least one record for each infant reported. A record should be submitted for each service provided to the infant. The student ID number AND the SELPA codes must match in the Student Information and the Infant Services data tables.
C - Discipline	End of Year cycle	One record for each disciplinary action a special education student received. For example, a special education student who received three disciplinary actions during the year will have a record submitted for each action. A total of three disciplinary records are to be submitted for that student. NOTE: The CASEMIS data Verification phase requires the student ID number AND the SELPA codes match in the both the Student Information and the Discipline data tables.

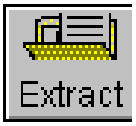
Using the CASEMIS Software

Launching the Software	
Action	**What is on the screen**
Click Start on the Windows Task Bar.	
A list of options will display. **Highlight Programs** from the displayed list by moving the mouse arrow over	
An additional list will display. **Highlight CASEMIS Applications** by moving the mouse arrow over	
The CASEMIS name will refer to the data cycle the software is programmed for. A sample cycle name is ***CASEMIS December 2002***. **Highlight CASEMIS cycle name** by moving the mouse arrow over  …..	

Main Menu Screen	
This screen is referred to as the Main Menu. As you Exit or Close other screens, you will be returned to this screen.	

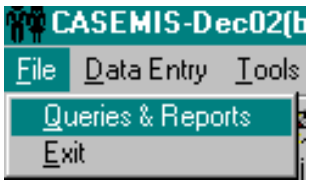
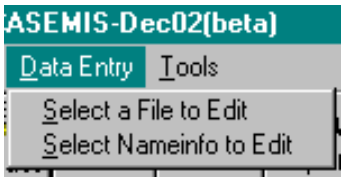
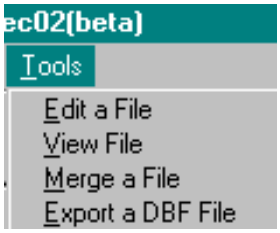
After launching the software there are several options available in the CASEMIS software. There are two ways to direct the software in what to do, icons and menu options.

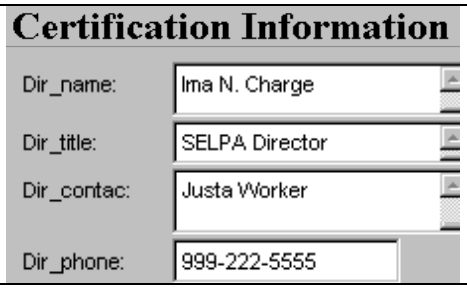
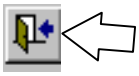
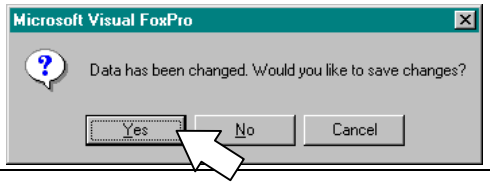
ICONS - CASEMIS Main Menu screen

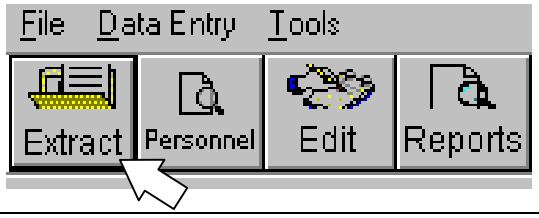
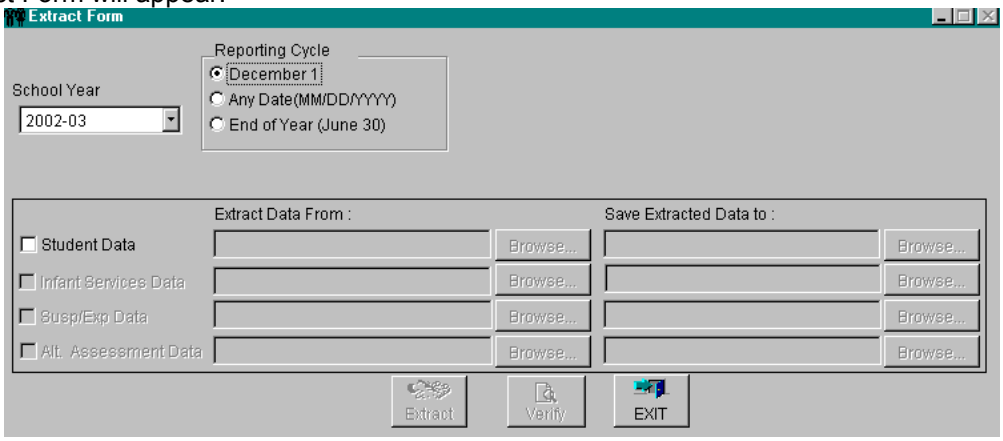
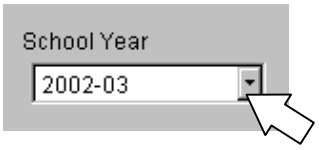
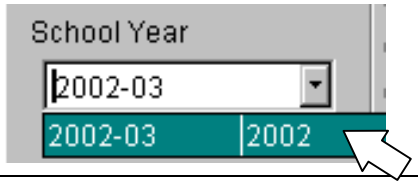
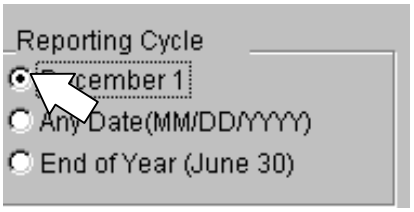
Icon	Description of Programming Activated
	**Extract** - Gathers student level data into a new file for data verification, certificate generation, problem identification and reports. Errors, warnings and duplicate students are identified during the verification phase. This option requires that your file have the correct data structure. See the CASEMIS User's Manual for specific information about the data fields and codes.
	Personnel – Data regarding Personnel information (special education staff) can be entered for the required annual reporting period.
	Edit DBF file - Student level data fields are subjected to routine checks. Inconsistencies (if any) produce a list of errors and warnings. All errors must be corrected. Warnings must be reviewed prior to submitting the data to the Department of Education.
	Reports - Several reports are pre-programmed for your convenience.

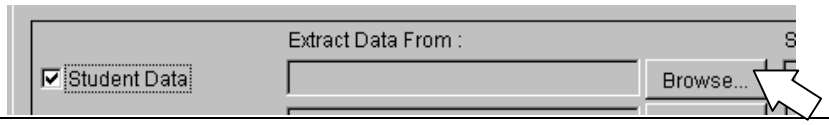
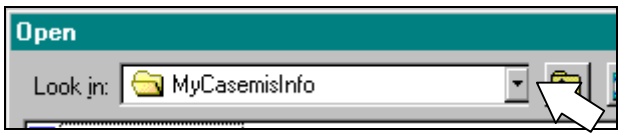
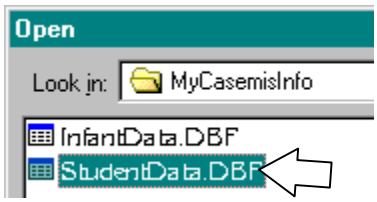
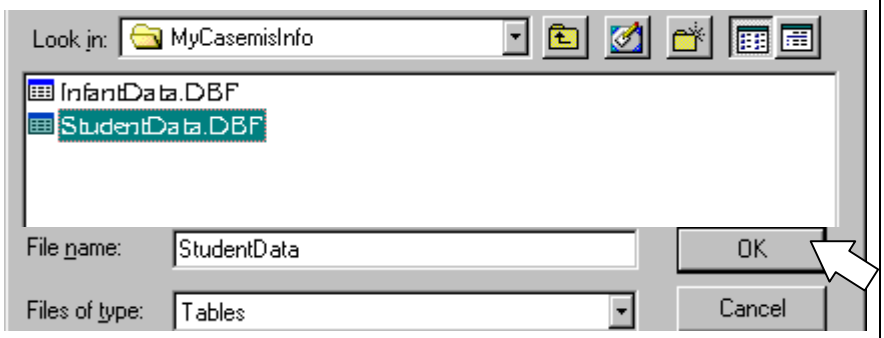
Command Options – Main Menu Screen

Command options are located in the upper left corner of the Main Menu window. These can be activated by a single left mouse button click. A vertical list of sub-menu options will display. Select the appropriate option by highlighting it with the mouse.

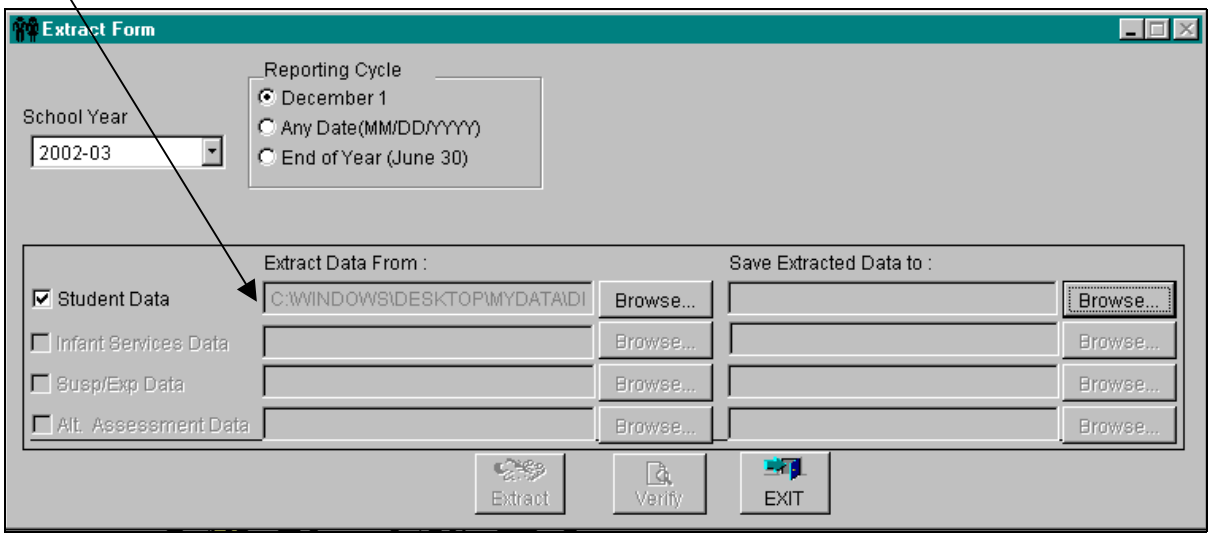
Option	Drop down Options	What they do
		**Queries and Reports** designed by the California Department of Education providing district, site or SELPA summary data **Exit** software
		**Select File for Edit** gives the user a way to change information located in a database (.dbf) **Select NameInfo to Edit** allows the user to correct the director's information on the software generated certification report
		**Edit a file** gives the user a way to <u>change information</u> in a database, text/ASCII file, or comma delimited files. These files names end with **.dbf**, **.txt**, or **.csv**. **View a file** gives the user a way to <u>look at information</u> in a database, text/ASCII file, or comma delimited files. **Merge a file** provides programming which will combine two files as a new third file. **Export a file** will send information from a database and create a new text or comma delimited file.

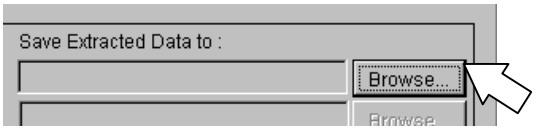
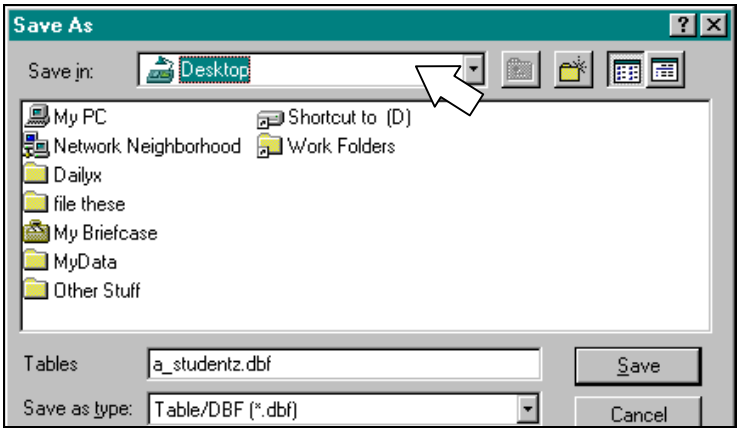
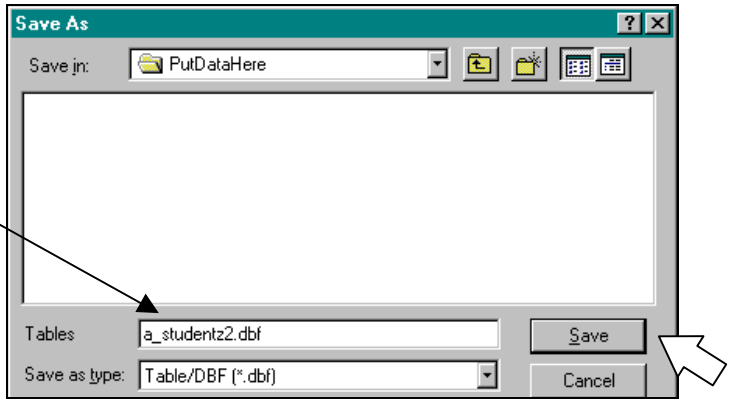
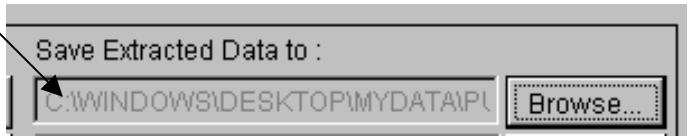
Correct the Authorization Section of the Certification Report	
Action	**What is on the screen**
Locate the Command Options	
Click Data Entry Data Entry	
Select NameInfo to Edit Select Nameinfo to Edit from the drop down list	
Type the correct information in the boxes	
Click Exit	
Click Yes to save the changes, No to abort the changes, or Cancel to return to the edit screen.	

Selecting the Reporting Cycle	
Action	**What is on the screen**
Click Extract by depressing the left mouse button once and rapidly release.	
The Extract Form will appear. 	
Click the down arrow . **Select the School Year** from the list that appears.	 
Click the Reporting Cycle (adjacent circle to the appropriate cycle you are reporting). The center of the circle will darken indicating selection.	

Pathway to the Data	
Action	**What is on the screen**
Click Student Data. A check mark will appear in the box.	
Click Browse… Browse...	
Locate the data file using normal Windows conventions.	
Double click the file to select it as the data source file.	 The **Files of type** must be set at Tables. If your file does not display in the file list, refer to the **Special directions for TEXT and COMMA DELIMITED** section to convert your file into a database.
Click OK OK	

The pathway (where the data is located) is automatically typed in for you (based on the file you selected).



Choosing a Target or Destination Folder	
Action	**What is on the screen**
Click Browse… Browse...	
Locate the data folder (using normal Windows conventions) where you want the new data file.	
Double click the destination folder to select it as the target folder.	
(Optional) You *should* give the file a different name at this time by editing the name in the Tables box. If an Alert message appears that the file already exists, follow the direction in the next section, **File Name Already Exists Alert**, before continuing. **Click the Save** Save button to complete the operation.	
The pathway is automatically typed in for you. When the destination folder is selected, additional data selections may become available (dependent upon Reporting Cycle selection).	

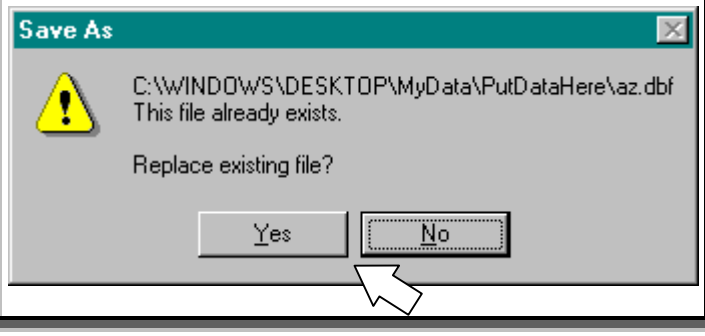
File Name Already Exists Alert

If you have previously attempted to extract the data the following screen may appear.

Click [Yes] to delete the file with the same name and replace it with the current file.

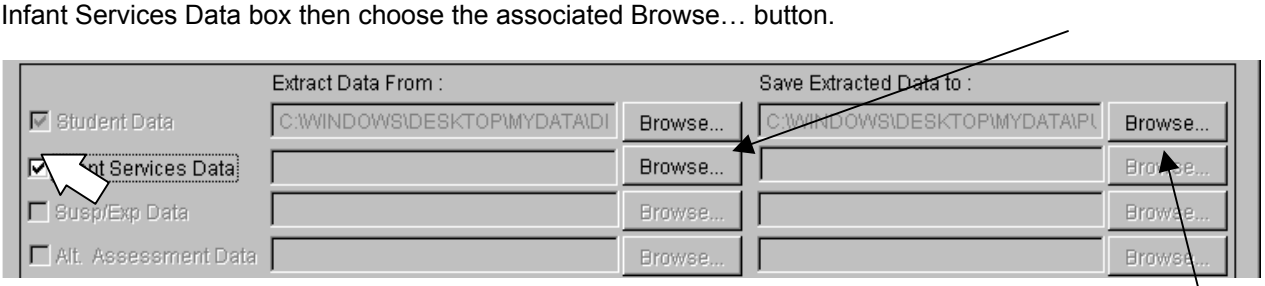
OR

Click [No] to return to the previous screen and type in a different file name.



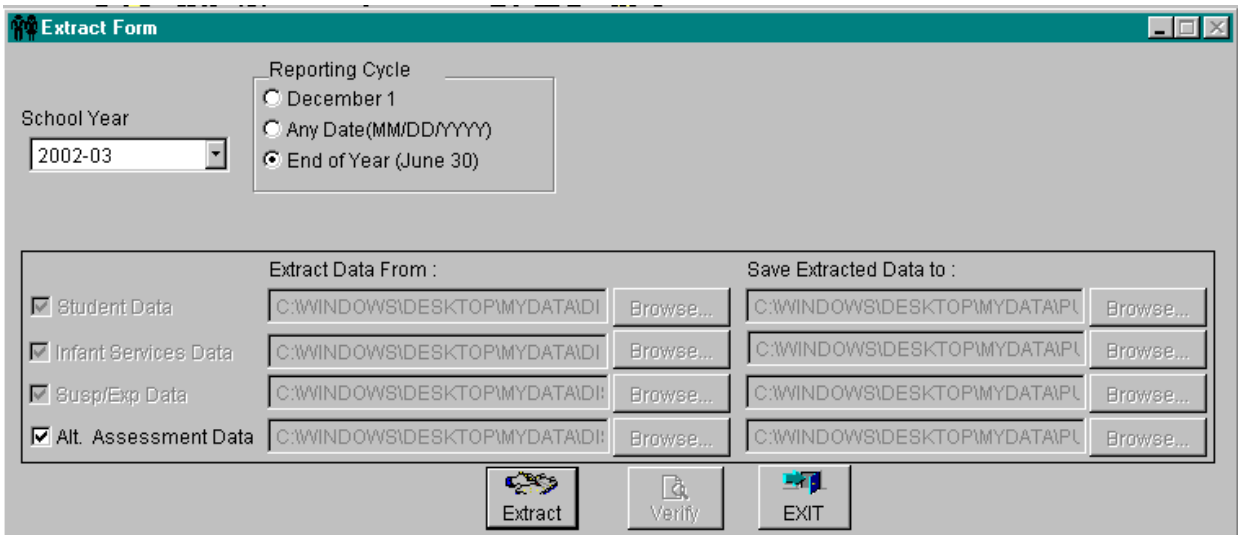
Infant and Disciplinary Data

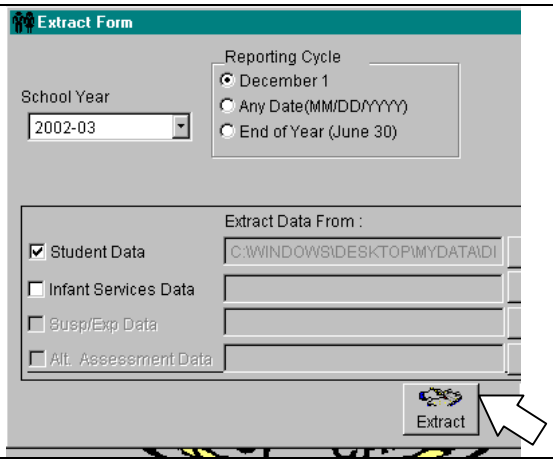
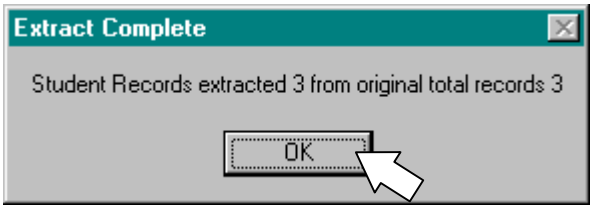
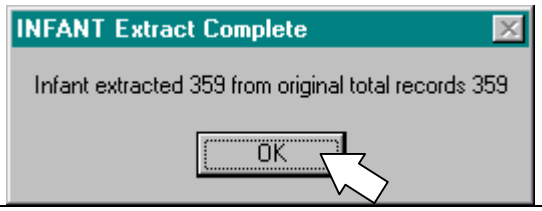
When infant, or disciplinary data are submitted you will repeat the steps listed in the **Pathway to the Data** sections checking the box for the data being submitted. For example, when there is Infant data, check the Infant Services Data box then choose the associated Browse… button.

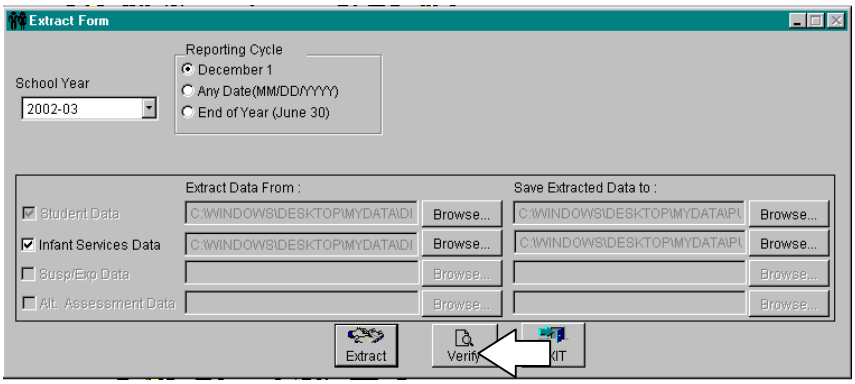


After completing the **Pathway to the Data** section, proceed to the **Choosing a Target or Destination Folder** for each data file as appropriate. Use the associated Browse… button for each data file.

For example, when all of the necessary types of data files are being submitted for extraction, the screen will appear similar to the figure below. Be sure to note where the extracted files are saved to and their names. These files will email to the Special Education Division after processing.

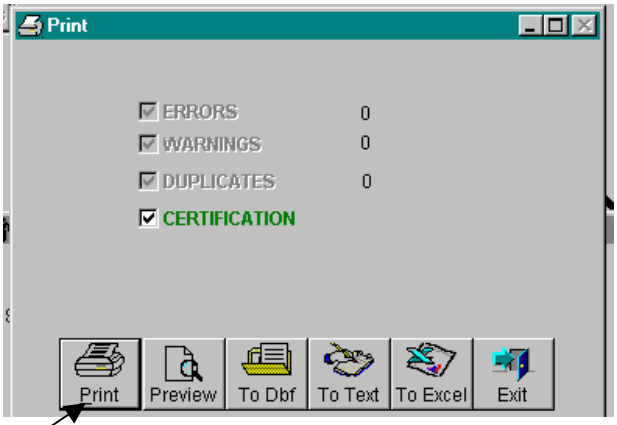


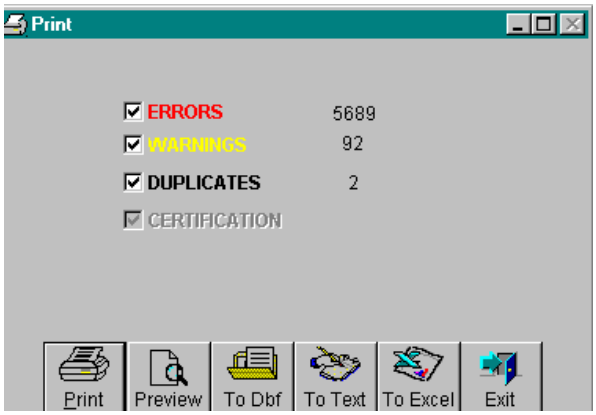
Executing the Extraction Command	
Action	**What is on the screen**
After you have indicated the *Pathway to the data*, completed *Choosing a Target or Destination Folder*, and given a name to each extracted data file, proceed with the instructions below. **Click the Extract button** Extract at the bottom of the Extract form screen.	
Click the OK button OK. Verify that all records were extracted.	
Click the OK button OK for each additional file designated for extraction as appropriate. Verify that all records were extracted.	

Verify the Data	
Action	**What is on the screen**
Click Verify Verify located at the bottom of the screen	

Verified Data Options	
This reference information will assist you working with the verification phase results. NOTE: When there are multiple reports checked, you will issued separate commands for each report.	
Option	**What happens**
Print	**Print** sends the report(s) to the printer using normal Windows protocols.
Preview	**Preview** – Displays an electronic image of the printed report(s). A floating navigation toolbar appears with this selection. The toolbar can be docked or moved as typical of Windows applications. Some tools may appear dimmed and temporarily not available. For example, if you are viewing the report's first page, and are dimmed.
	Print Preview Toolbar and Individual Tool Usage Toolbar can be moved per Windows protocol. Print Preview 100% Show the first page of the report Move backward one page GO TO PAGE. Type in the page number you wish to view and click the OK button. Go to Page Page Number: 1 OK Cancel Move forward to the next page. Show the last page of the report. 100% Change the magnification level. Exit preview. Print the report.
To Dbf To Text To Excel	These icons allow you to create a separate file. The data sent to the new file are the errors, warnings or duplicate students found during the verification process. For your convenience the file can be created as a database, text document, or spreadsheet, respectively. When the new file creation is completed, a message will appear in the upper right corner of the window Transfer Complete - press any key. The screen will be frozen until you press a key to clear the message box off of the screen.
Exit	Close/Exit the screen.

Verification Phase Results	
File(s) ready for Certification A Print screen with Certification checked appears if data is complete and correct.	**File(s) NOT available for Certification** The associated boxes will be checked when the verification phase locates Errors, Warnings, or Duplicates



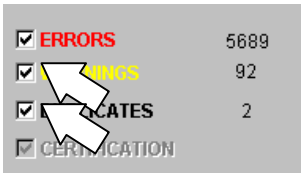
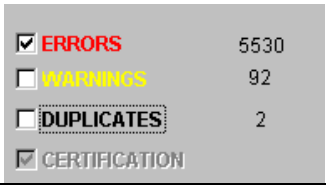


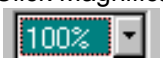
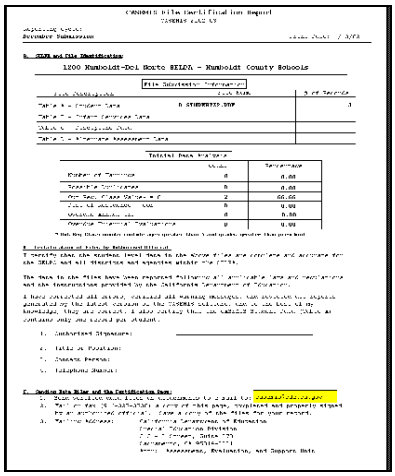
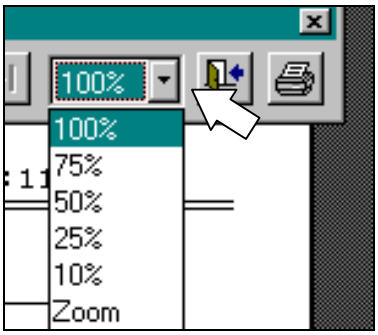
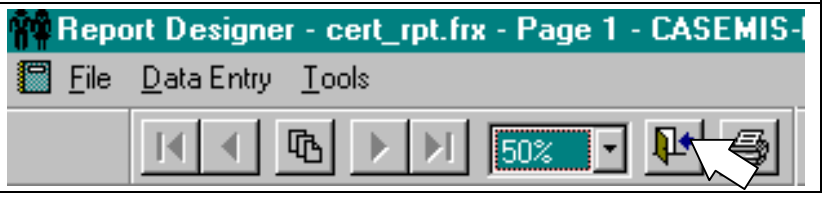
An explanation for each icon was provided previously in the section **Verified Data Options.**

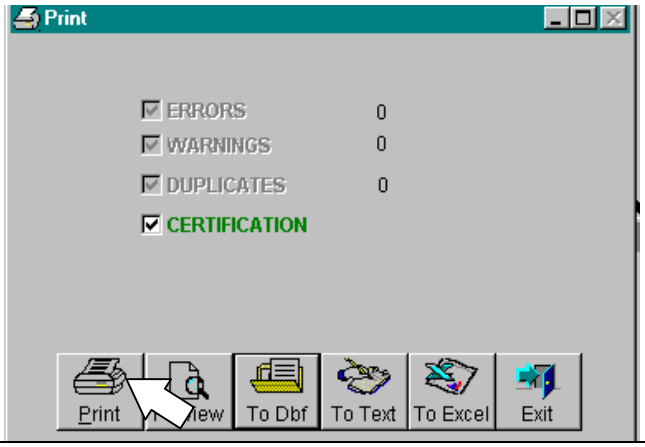
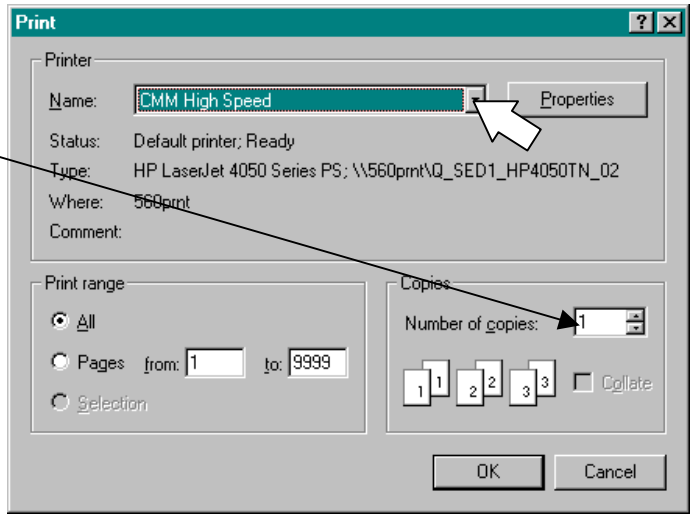
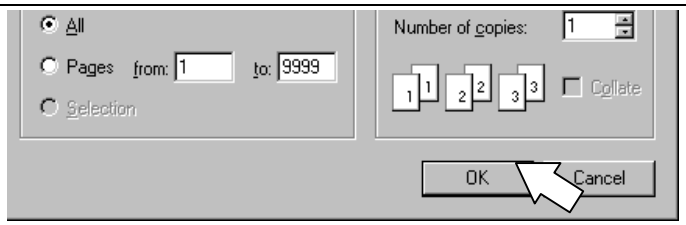
Sample Verification Process Outcomes		
ERRORS 5689 WARNINGS 92 DUPLICATES 2 CERTIFICATION	ERRORS 3 WARNINGS 0 DUPLICATES 0 CERTIFICATION	ERRORS 0 WARNINGS 1 DUPLICATES 0 CERTIFICATION
Errors, Warnings, and Duplicates were found. All three reports are highlighted, therefore, a report for each will be generated. (Certification is dimmed and unavailable.)	Errors only were found. One report will be generated. (Warnings, Duplicates and Certification are dimmed and unavailable.)	Warnings were found. Two reports will be generated. (Errors and Duplicates are dimmed and unavailable.)

How Does the Verification Outcome Impact What I Do?		
Verification Result	**What is required**	**Does it prevent Certification?**
Errors	Must be corrected	Yes
Warnings	Verify that data is correct	No
Duplicates	Must be corrected	Yes

If the Errors, Warnings or Duplicate box is checked, proceed to the sections:
Verified Data Options and **Data Review and Correction.**

Controlling Verification Report(s)		
Action	**What is on the screen**	
Click the adjacent box. Each mouse click in the box will check/uncheck the report. Active reports have a check mark in the adjacent box. Inactive reports do not have a check. Dimmed reports are not available and clicking them has no affect.	Uncheck boxes to deselect reports. Only checked (active) reports respond to the options given. 	Deselected boxes will suspend report preview, print, and exports. Only the Errors Report is active. 

File(s) ready for Certification		
Action	**What is on the screen**	
Click Preview		
Review the Certification Report for accurate Authorization information and number of records processed. Click Magnification  to change the image size. **If the Authorization section is missing or has incorrect information for the Authorized Signature, Title or Position, Contact Person or Telephone Number, go to the Correct the Authorization section of the Certification Report section before proceeding.**		 A magnification option is available in the form of a drop down list for your convenience.
If everything is correct… Click Print		
Click Exit screen		

Print the File Certification Report	
Action	**What is on the screen**
Click Print located at the bottom of the screen	
Select the printer and number of copies (using normal Windows conventions.	
Click the OK button OK.	

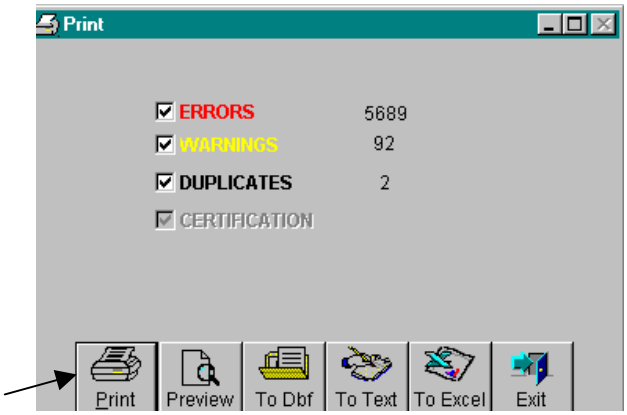
Email the CASEMIS files created during the extraction/verification process to casemis@cde.ca.gov. Include the SELPA number and SELPA name in the email.

A Certification report must be signed by the SELPA director (or other authorized agent) and faxed to the Special Education Division (SED) the same day the files are sent. The files can be processed ONLY if a signed certification is also received. Fax the certification to 916-327-3730. A response will be sent confirming that the files were successfully processed and the certification page received. Do NOT assume your files were received.

**** NOTE: Any reference to Alternate Assessment files should be ignored.***

Using Verification Reports

The associated boxes will be checked when the verification phase locates Errors, Warnings, or Duplicates



An explanation of each icon was provided in Part 1 section **Verified Data Options**.

First, review the magnitude and type of alerts by using the Preview button. Once the problems are reviewed, several options are available to you. Dependent upon the circumstances, you will determine the correct action(s) to take.

A separate report will be available for each highlighted checked areas. For example, if Errors and Duplicates are checked, two reports are generated. You may select which of the available reports you wish to work with by checking or unchecking the adjacent box.

Three choices are available for correcting data.
Choice 1, it is suggested that if there are only a few errors that you will edit the extracted database. Continue with these procedures.
Choice 2, notify your information technology staff who supplied the file or those who maintain the data files (make data entries) to correct the data and then give you the corrected file for processing.
Choice 3, edit the source file then extract the file again. See section titled **Editing Source TEXT and COMMA DELIMITED files**

Corrections to the data may be expedited through effective use of the reports. You may wish to print out the errors to assist those correcting the data. If there are more than a few records with errors or warnings to be corrected, the reports can be sent to Dbf, Text or Excel.

Sample Validation Error Report

Record	Student ID	Name	BirthDate	Error	Message
C:\WINDOWS\DESKTOP\MYDATA\PUTDATAHERE\A_STUERROR.DBF					
Selpa 1200					
District 1262919					
4	4567891234	LITTLE, TYKE	10/16/02	E171	PARTICIP CODE IS IN ERROR
C:\WINDOWS\DESKTOP\MYDATA\PUTDATAHERE\B_INFERROR.DBF					
Selpa					
District					
4		Infant Record, Error	/ /	E201	NO STUDENT RECORD FOR INFANT SERVICES

Understanding the Report Contents

Pathway to the file the report was generated about. (During the extraction phase you were shown a pathway of where to "put the data" extracted. This sample shows two files with errors.

Student information file and an Infant Services File

You must know where the file is to correct it.

Record	Student ID	Name	BirthDate	Error	
C:\WINDOWS\DESKTOP\MYDATA\PUTDATAHERE\A_STUERROR.DBF					
Selpa 1200					
District 1262919					
4	4567891234	LITTLE, TYKE	10/16/02	E171	PARTIC
C:\WINDOWS\DESKTOP\MYDATA\PUTDATAHERE\B_INFERROR.DBF					
Selpa					
District					

SELPA/District related to the error will assist in locating who to contact for correct information.

Some problems will not list a SELPA / District when the Infant Services, or Discipline file does not have a corresponding record in the Student Information file.

C:\WINDOWS\DESKTOP\MYDATA\PUTDATAHERE\A_STUERROR.DBF					
Selpa 1200					
District 1262919					
4	4567891234	LITTLE, TYKE	10/16/02	E171	PARTIC
C:\WINDOWS\DESKTOP\MYDATA\PUTDATAHERE\B_INFERROR.DBF					
Selpa					
District					

Record is a sequential number assigned to the records by the software. This feature allows quick navigation to specific records when correcting problem records.

Next to the record is the Student ID provided by the SELPA/District.

Record	Student ID	Name	BirthDate	Error	Message
C:\WINDOWS\DESKTOP\MYDATA\PUTDATAHERE\A_STUERROR.DBF					
Selpa 1200					
District 1262919					
4	4567891234	LITTLE, TYKE	10/16/02	E171	PARTICIP CODE

Name	BirthDate	Error	Message
OP\MYDATA\PUTDATAHERE\A_STUERROR.DBF			
LITTLE, TYKE	10/16/02	E171	PARTICIP CODE IS IN ERROR
OP\MYDATA\PUTDATAHERE\B_INFERROR.DBF			
Infant Record, Error	/ /	E201	NO STUDENT RECORD FOR IN

The Student's **Name** and **Birth Date** are listed for easy identification.

However, when a corresponding record in the Student Information file is missing a message is substituted.

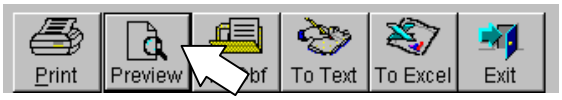
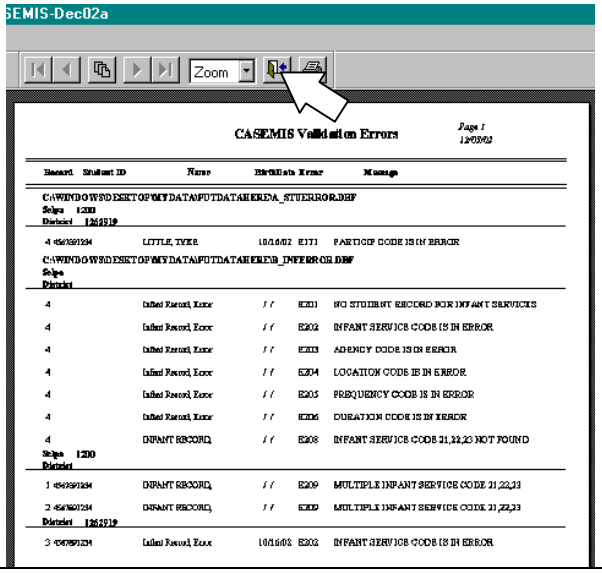
ate	Error	Message
_STUERROR.DBF		
02	E171	PARTICIP CODE IS IN ERROR
_INFERROR.DBF		
	E201	NO STUDENT RECORD FOR INFANT SERVICES

Specific information is provided in the CASEMIS Users' Manual Appendix F for each code and message displayed. Explanations may assist in correcting the problem(s) encountered.

Error/Warning Code and

related Message

Exporting Errors, Warnings and Duplicates Reports	
Action	**What is on your screen**
Click To Dbf , To Text or To Excel	To Dbf To Text To Excel
Locate the data folder (using normal Windows conventions) where you want the new data file. Double click the destination folder to select it as the target folder.	Save As Save in: PutDataHere DeptDataPlan Move My Briefcase MyData PutDataHere Other Stuff phoneInfo profileKeep Tables Save as type: File (*.txt) Save Cancel
Type in the Tables box to Name the file. Click Save Save.	Tables ExportedStu Save as type: File (*.txt) Save Cancel
A message will appear that the export was completed. Press any key to acknowledge the confirmation.	Transfer Complete - press any key

PreViewing Errors, Warnings and Duplicates Reports	
Suggested procedures are as follows. (You may work with printouts or other file format at your option.)	
Action	**What is on your screen**
Click Preview	
Review the report(s) for the types and magnitude of errors. An explanation of each navigation button was previously listed in the section **Verified Data Options** - see the reference to **Print Preview Toolbar and Individual Tool Usage**. If more that one report was checked on the display **Verification Process Outcomes,** you will have an opportunity to preview each report. **Click Exit screen** to close the report. You must do this for each report after reviewing it.	

Sample Scenario: Preview and Review Validation Issues	
Action	**What is on your screen**
Click Preview Preview. Because the Errors and Warnings boxes are checked, both reports will be previewed.	ERRORS 4 WARNINGS 1 DUPLICATES 0 CERTIFICATION Print Previe To Dbf To Text To Excel Exit

You will first review the four Errors detected during the Validation Phase.

In the Error Report … 1) There are no Infant Services records for Tyke Little in the Infant Services file. 2) There are three records for infant services, but no corresponding records in the Student Information Notice that the arrow navigation buttons are dimmed. There is only one page to the report and no other pages to see.	CASEMIS Validation Errors — Page 1 — 12/03/02 Record Student ID Name BirthDate Error Message C:\WINDOWS\DESKTOP\MYDATA\PUTDATAHERE\A_STUDENTZE.DBF Selpa 1200 District 1262919 4 4567891234 LITTLE, TYKE 10/16/02 E200 NO SERVICES RECORD FOR INFANT C:\WINDOWS\DESKTOP\MYDATA\PUTDATAHERE\B_INFANTZE.DBF Selpa 1200 District 1 4567891233 Infant Record, Error / / E201 NO STUDENT RECORD FOR INFANT SERVICES 2 4567891233 Infant Record, Error / / E201 NO STUDENT RECORD FOR INFANT SERVICES 3 4567891233 Infant Record, Error / / E201 NO STUDENT RECORD FOR INFANT SERVICES
Click Exit screen to leave the Errors Report.	100%
Review the Warnings. There was only one warning area detected by the Validation Phase. Once again, the navigation buttons are dimmed, a one-page report.	CASEMIS Warnings Record Student ID Name BirthDate Error Message C:\WINDOWS\DESKTOP\MYDATA\PUTDATAHERE\A_STUDENTZE.DBF Selpa 1200 District 1262935 1 1234567890 MONK, CHIP 05/20/90 W900 RESID_STAT CODE IS 71 OR 72
Click Exit to leave the Warnings report.	100%

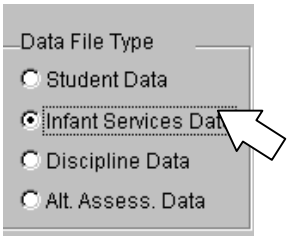
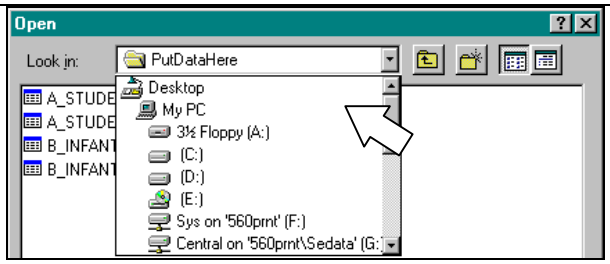
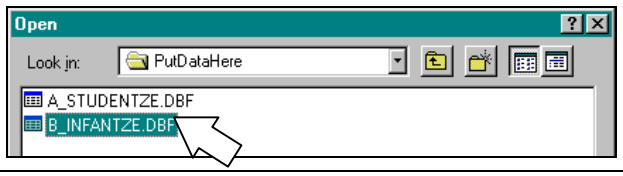
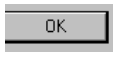
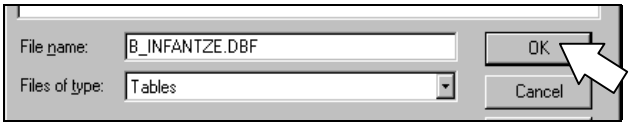
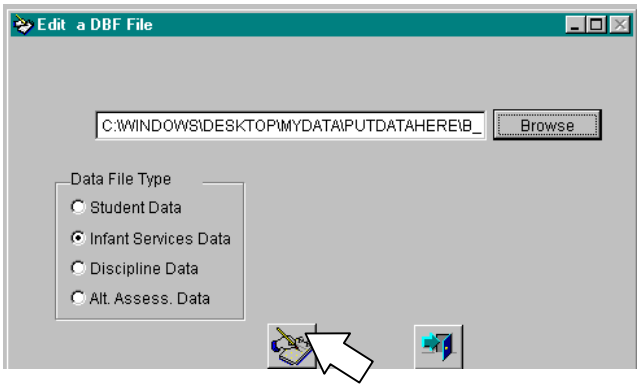
These errors and warnings can be easily corrected on-line. You will have to follow the directives dictated by your situation, as appropriate.

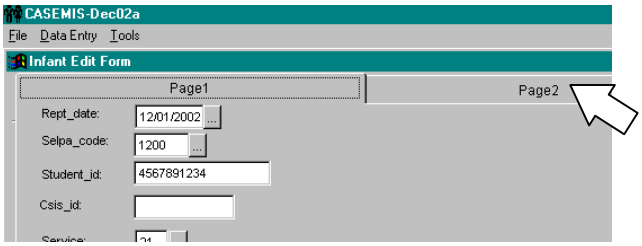
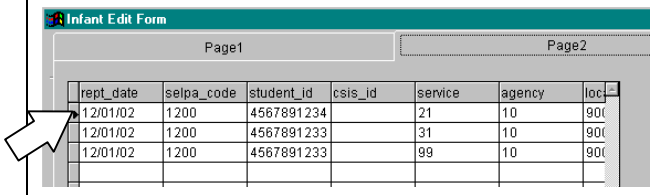
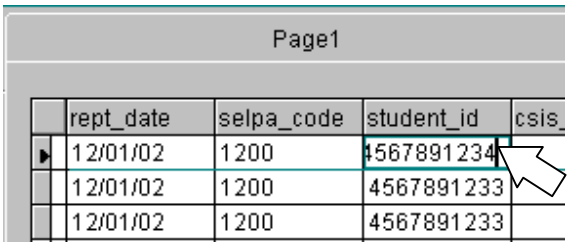
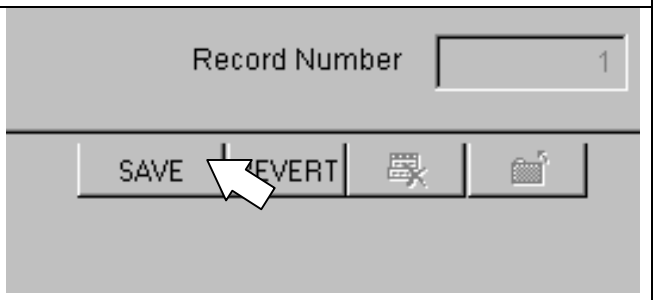
Sample Scenario – On-line Corrections to the Infant Services File

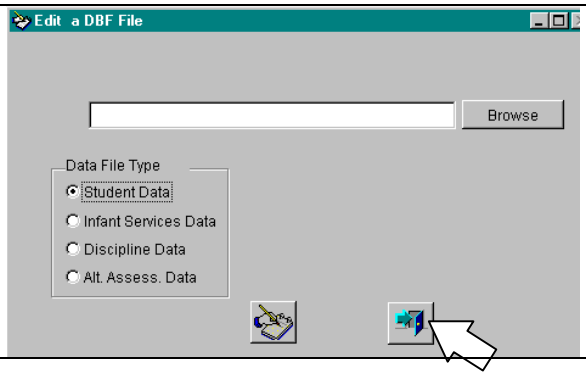
The following is **an example** of how data may be corrected using the CASEMIS software.

Fix Errors / Warnings Using the Edit Button

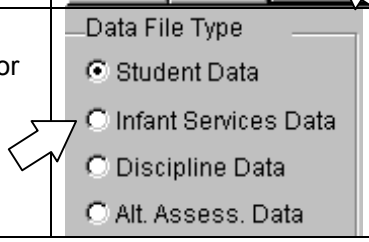
located on the Main Menu screen

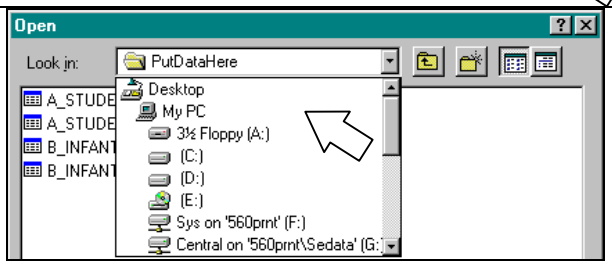
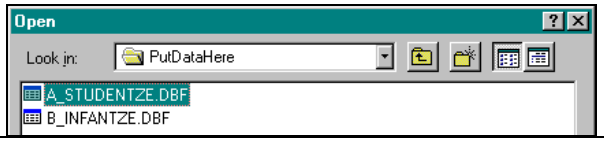
Action	What is on your screen
In this scenario, we discover that the Student ID numbers for the Infant Services were entered as 4567891233 instead of 4567891234. The mismatch of Student IDs caused the Errors. Click Infant Services Data	
Click	
The software will permit errors to be corrected on the extracted file created at the beginning of this documentation. Locate and Select the verified Infant Services data file using normal Windows conventions.	 
Click OK 	
Click Edit to make the corrections.	

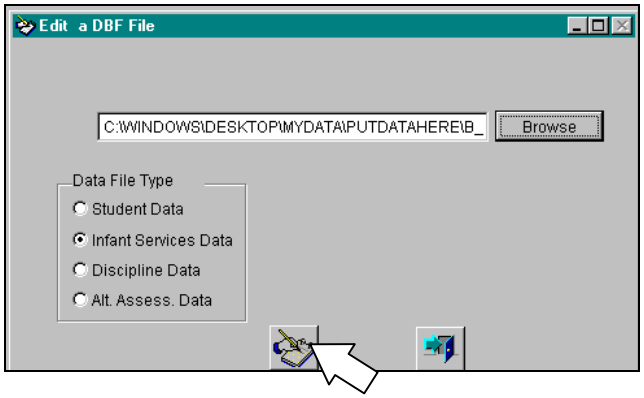
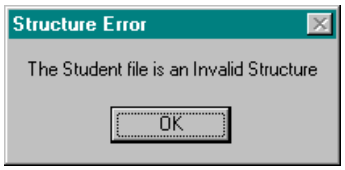
We will be correcting the Student_id for all submitted records. **Click Page 2** Page2. This will expedite corrections by scrolling through records.	
Click into the first grid row of record. A small triangular arrow will appear in the far left column. This is pointing to your active record.	
Click Edit EDIT, located at the bottom right-side of the Infant Edit Form. The options at the bottom of the screen immediately change.	
Make the correction to the student_id for the record/row.	
Click Save to accept the changes SAVE REVERT. The Revert button will cancel the changes made. Repeat this step by clicking to activate the subsequent row, click Edit, make changes, click Save. This screen serves as a quick method of error correction. You should Save changes before moving to another row.	
Click Exit, when infant Services edits are complete. The correction of the Infant Services file also corrects the Student Information file (which lacked services for the infant listed).	

Click Exit located at the bottom of the Edit a DBF File screen.	

On-line Corrections to the Extracted File – Choice 1

Select Data File Type for Editing	
Action	**What is on your screen**
Click Edit located on the upper left corner of the Main Menu screen	
Click the circle adjacent to the Data File Type that contains the Errors, Warnings, or Duplicates to be corrected.	

Locate the Data File for Editing	
Action	**What is on your screen**
Click Browse	
Locate and Select the data file you will be correcting using normal Windows conventions. You may choose to use the extracted	
The software permits changes to the extracted files created at the beginning of this documentation (Choosing a Target or Destination Folder).	
Click OK OK to select the file.	

Editing Data	
Action	**What is on your screen**
Click Edit to make the corrections.	
If the structure of file selected through Browse and the selected Data File Type do not match, an alert message regarding the structure mismatch will appear. Check the Data File Type and the selected file for the error.	

Edit Data Screens – General Features

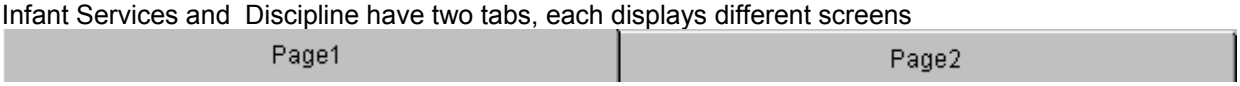
Edit screens are unique for each Data File Type. However, some features are common between them.

Tabs,

, organize the data fields making window scrolling unnecessary.

Student Information files have four tabs or four pages of different data screens. Page1, Page2, and Page3 are record specific, that is, only information for a single student record is displayed at a time. For example, when editing data on Page1 - record 4 and additional data fields are located on Page2 or Page3, clicking the tab Page2 will continue to display record 4 information. Even though the Page changes, the record (student) does not change.

Infant Services and Discipline have two tabs, each displays different screens



Multiple record browse is available for all data type files. Instead of one record per screen, the entire data file can be scanned using the scroll bar. All fields for the data file may be scanned for all records also.

In Student Information files it is the Browse tab,

.

In the Infant Services and Discipline data files it is the Page2 tab,

.

Edit Data Screens – Record Navigation

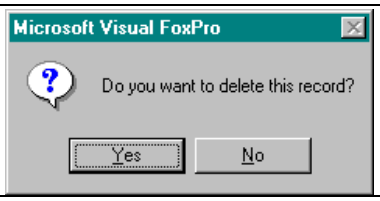
Record Navigation facilitates record location for review or correction. Moving from one record to another can be accomplished two methods, **Recno** or **Button Navigation**. This will assist in data review and correction and is available on all data type screens.

Moving through the records can be incremental using **Recno**,

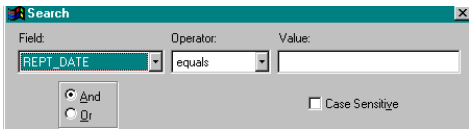
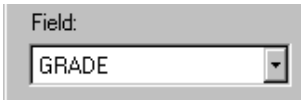
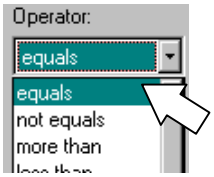
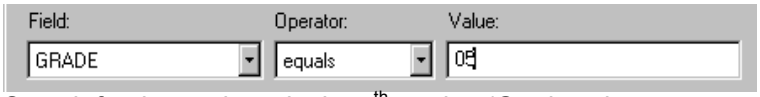
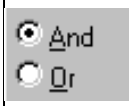
. This feature is located in the lower right corner of each screen. Up and down arrows moves through records in the indicated direction one at a time.

Record Navigation toolbars have several Button features and are located on each screen.

Button Navigation - Click the appropriate navigation button located at the bottom of the screen. The record number currently displayed can be identified by looking at the **Recno** box located in the lower right side of the screen.

Icons	Action
Top <<	Moves you to the first record in that data file
Prev <	Moves you to the previous record that is, one record backward for that data file
Next >	Moves you to the next record, forward one record with each click of the NEXT button
Bottom >>	Moves you to the last record for that data file
Find	A special search screen is activated. The feature searches and locates the data file for records that meet the criteria entered. See the section titled Find Data Feature for details.
Add	Creates a new record in the data file.
Edit	Activates the record so corrections can be made.
Delete	Erases the chosen record from the data file. You will be prompted to confirm prior to the actual record deletion. 
Save	Keeps the changes made to a record.
Revert	Cancels the changes made to a record.
Exit	Closes the window and displays the Edit a DBF selection screen.

Find/Search Data Feature
Record review and correction can be greatly enhanced by using the Find Feature. Searches locate text, numbers, or dates. The Find feature locates specified value(s) that are in the designated field(s). The record(s) located during a search are the only ones that can be seen, called a found set. To once again see all records in the data file visible the All button must be clicked.

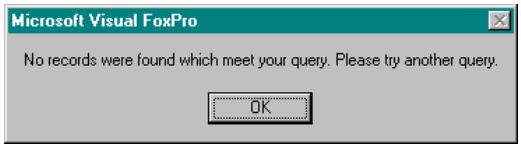
Action	What is on your screen
Click Find [Find] located in the Edit Data toolbar.	
A Search window will appear.	
Select the Field and Operator using the drop down list arrows, [▼], or the keyboard arrow keys to browse and select.	 
Enter the criteria in the Value box. Use the same values are listed in the CASEMIS Users' Manual.	 Search for the students in the 5th grade. (Grade values are two digits using the single digit "5" can produce erroneous results.)
You can make simultaneous find requests with different criteria and then search for records all at once. For example, you may search for students	 AND both criteria for each must match to be included in the found set. OR If either of the two criteria are found in a record it will be included in the found set.
Specifies whether the search is case-sensitive (uppercase and lowercase letters must match exactly	[☐ Case Sensitive]

[Search]	Launches the Search for the records meeting the specified criteria.
[Cancel]	Cancels the Search and returns to the Edit form.
[All]	Finds all records in the data file.

ONLY records matching the entered criteria will display on screen. (Defaults to the screen you were using when the Find button was clicked.)

A message appears when no records match the criteria entered.

rept_date	selpa_code	selpa_from	dist_serv	dist_resi	sch_code	sch_type
12/01/02	1200		1262919	1262919	6008015	10
12/01/02	1200		1262935	1262935	6008031	10



Student Edit Forms

There are four screens for editing student information. Page1, Page2 and Page3 display different data. The Browse tab can be scrolled to access all data fields in that file.

Page1 | Page2 | Page3 | Browse

Rept_date:	12/01/2002	Last_name:	LITTLE
Selpa_code:	1200	First_name:	TYKE
Selpa_from:		Student_id:	4567891234
Dist_serv:	1262919	Csis_id:	1
Dist_resi:	1262919	Ssn:	
		Birthdate:	10/16/2002
		Gender:	F

Page1 | Page2 | Page3 | Browse

Ethnicity1:	500	Home_lang:	00
Ethnicity2:		Plan_type:	1
Ethnicity3:		Refr_date:	12/21/2002
Ethnicity4:		Migrant:	F
Ethnicity5:		Resid_stat:	10
Ethnicity6:		Entry_date:	10/31/2002
Ell:	N	Last_iep:	10/31/2002
Sch_code:	6008031		
Sch_type:	10		

Page1 | Page2 | Page3 | Browse

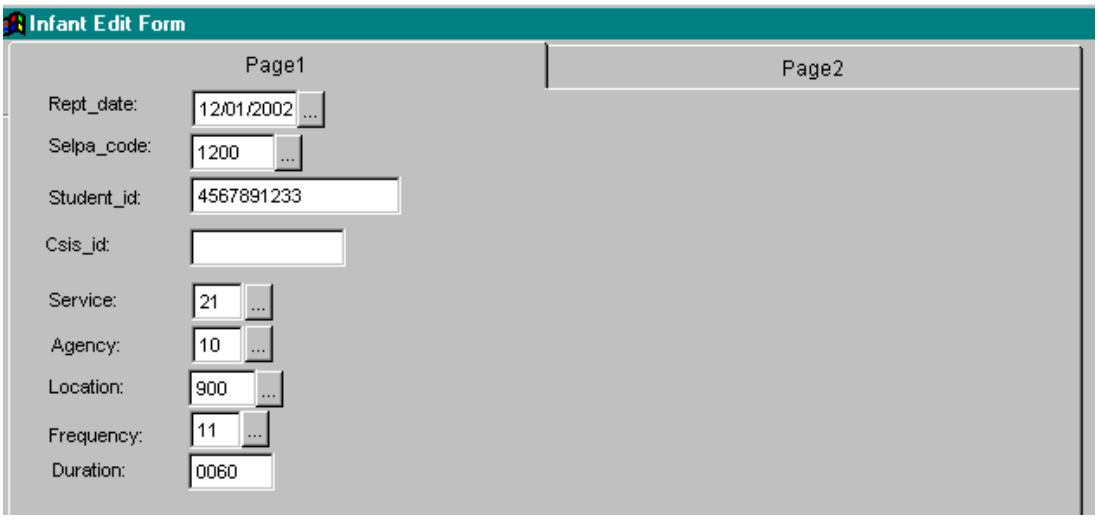
Last_eval:	11/06/2002	Workab:	N	Service6:	
Disability:	090	Tran_lang:		Service7:	
Sole_low:		Service1:	65	Service8:	
Presch_set:		Service2:		Particip:	10
Out_regcls:	000	Service3:		Exit_date:	/ /
Grade:	07	Service4:		Exit_reson:	
		Service5:			

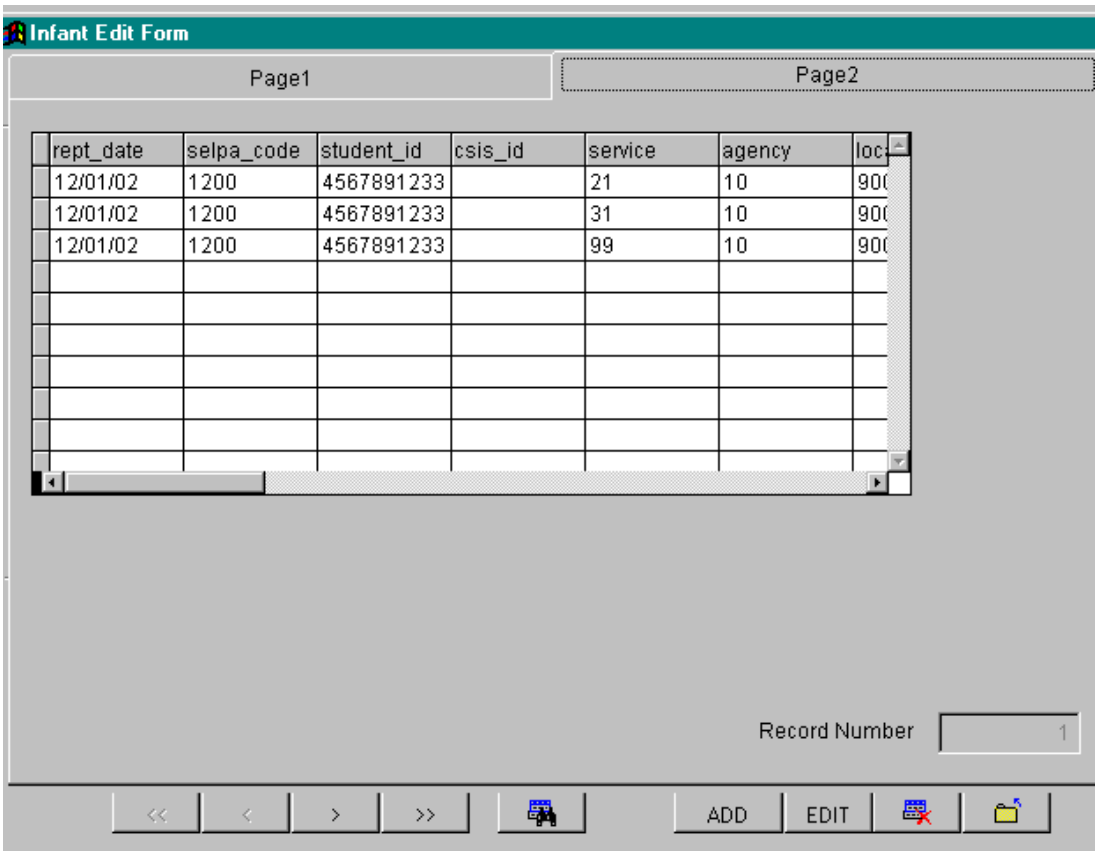
Page1 | Page2 | Page3 | Browse

rept_date	selpa_code	selpa_from	dist_serv	dist_resi	sch_code	sch_type
12/01/02	1200		1262935	1262935	6008031	10
12/01/02	1200		1262919	1262919	6008015	10
12/01/02	1200		1262935	1262935	6008031	10
12/01/02	1200		1262919	1262919	6008031	10

Infant Edit Forms

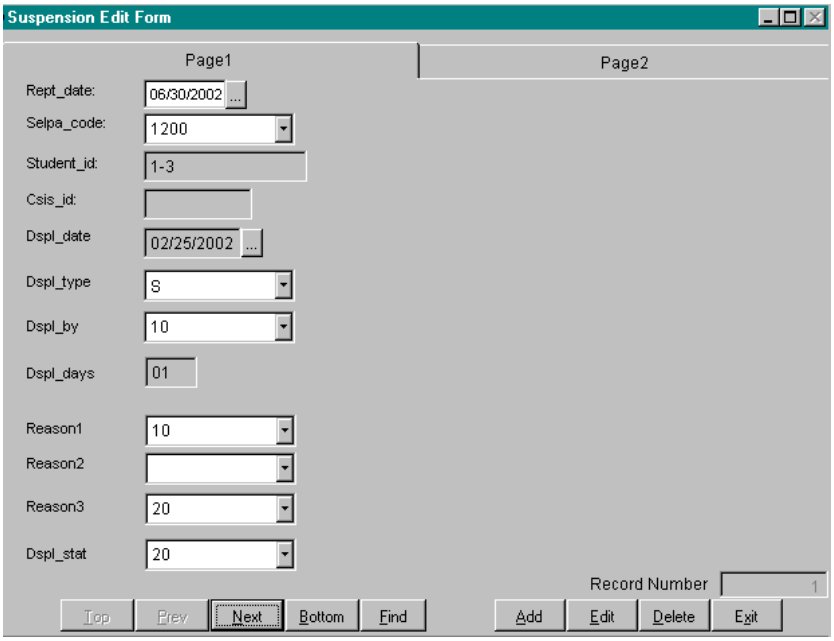
There are two screens for editing infant information. Page1 displays the data field one record at a time. The Page2 (browse) tab can be scrolled to access all data fields in that file and allows scrolling all records for quicker reviewing. Please note that the some navigation icons are slightly different from the other edits screens.

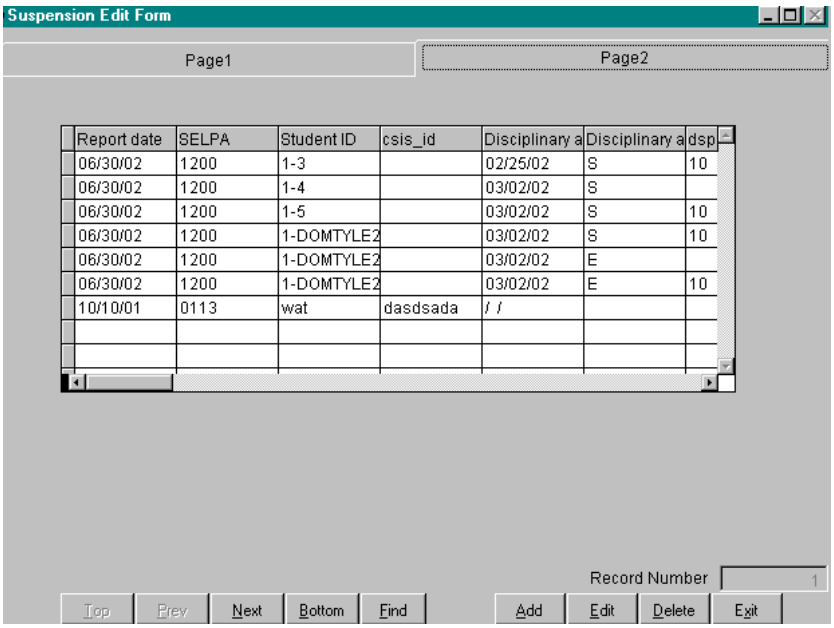




Suspension Edit Forms

There are two screens for editing suspension information. Page1 displays the data field one record at a time. The Page2 (browse) tab can be scrolled to access all data fields in that file and allows scrolling all records for quicker reviewing.





Report date	SELPA	Student ID	csis_id	Disciplinary a	Disciplinary a	dsp
06/30/02	1200	1-3		02/25/02	S	10
06/30/02	1200	1-4		03/02/02	S	
06/30/02	1200	1-5		03/02/02	S	10
06/30/02	1200	1-DOMTYLE2		03/02/02	S	10
06/30/02	1200	1-DOMTYLE2		03/02/02	E	
06/30/02	1200	1-DOMTYLE2		03/02/02	E	10
10/10/01	0113	wat	dasdsada	/ /		

Correcting Data

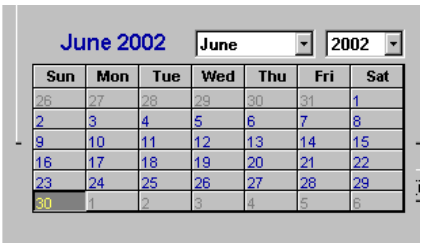
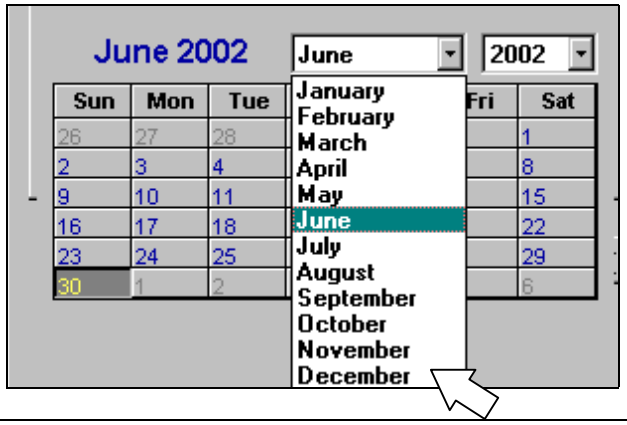
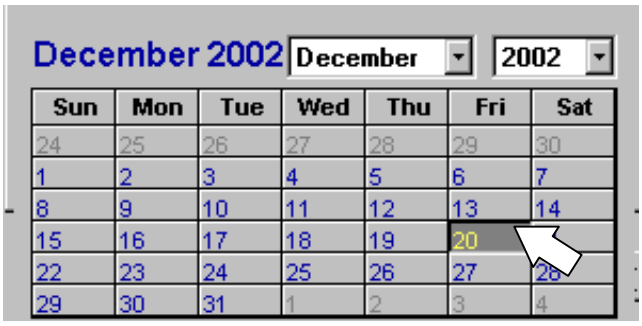
There are three edit methods, drop down lists, free entry and dates. Some fields have toggle buttons which display drop down lists or calendars, ... or ▼. Click the button to display the choices. The selection of data will close the choices display. If you do not wish to make a choice, click the button again and the choices will disappear.

Correcting Data – Drop Down Lists

Action	What is on your screen
Click the view list icon, ... or ▼ directly adjacent to the field to be changed.	Selpa_code: 1300 or Dist_resi: 1262919
Select from the generated drop down list.	Dist_resi: 1262935 Ssn: Birthdate: 05/20/199 Gender: M 0110017 ALAMEDA COUNTY SCHOOLS 0131609 CA SCHOOL FOR THE BLIND, FREMONT 0131617 CA SCHOOL FOR THE DEAF, FREMON 0131633 DIAGNOSTIC CENTER, FREMONT 0161119 ALAMEDA CITY UNIFIED 0161127 ALBANY CITY UNIFIED

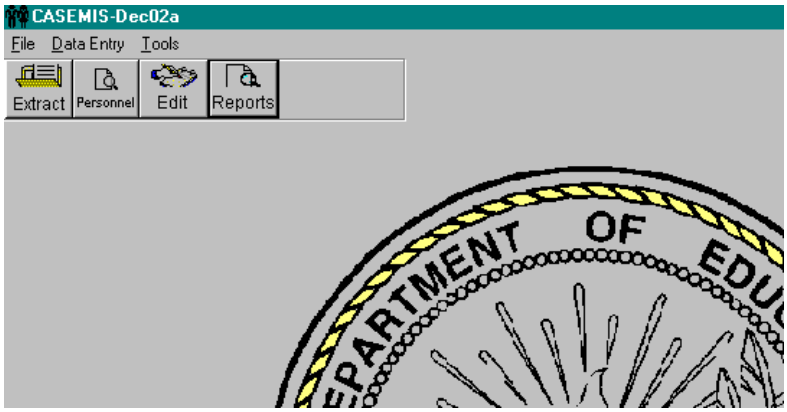
Correcting Data – Free Entry

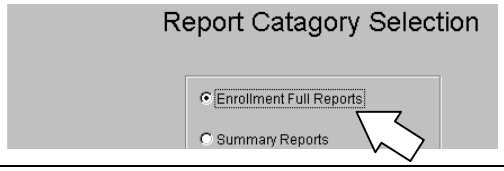
Action	What is on your screen
Click into the field to be changed.	First_name: CHIP
Click Edit Edit located at the bottom of the window.	Edit
Edit the field(s) as needed.	Last_name: MONK First_name: CHIPpy
Click Save Save to accept or **Revert** Revert, to discard the edits.	Save Revert Delete Exit

Correcting Data – Date Fields	
Action	**What is on your screen**
Click the view list icon, directly adjacent to the date to be changed.	
A Pop-Up calendar will appear showing the current data entered in the field.	
If necessary, **Click the down arrow** to correct the month. Choose the month with a single click on the correct month name.	
If necessary, **Click the down arrow** to correct the year. Choose the month with a single click on the correct year.	
Select date with a single click on the correct numeral. The Pop-Up calendar will disappear from view and the selected date entered into the field.	

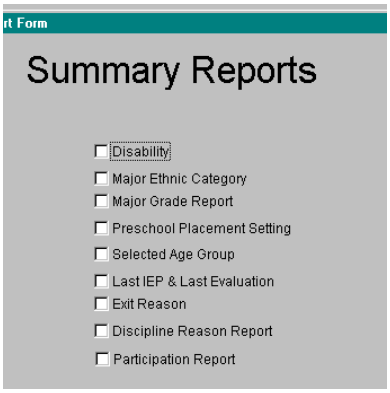
When the data is correct, Extract and Verify the data as outlined in User Guide Part 1.

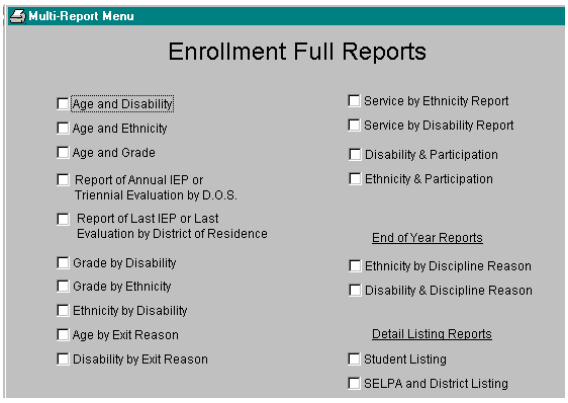
Report Selection



Action	What is on your screen
Click Reports icon	
Select the report category desired.	

Depending on the Report Category Selected one of these two Multi-Report Menus will appear.

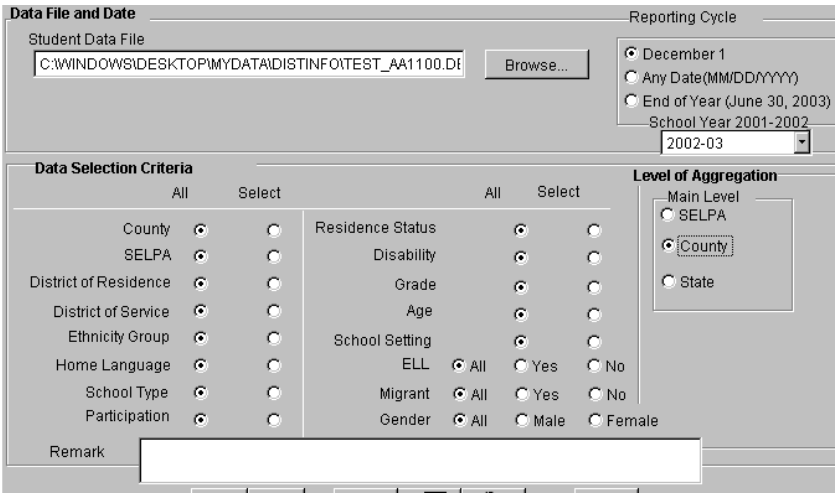


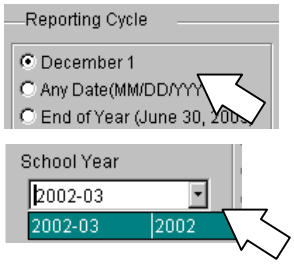
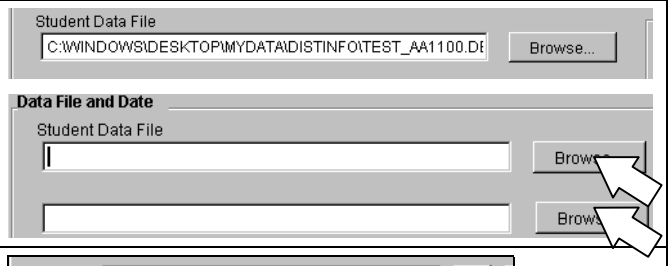
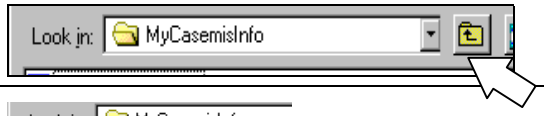
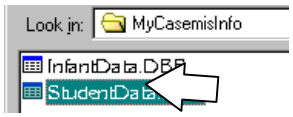
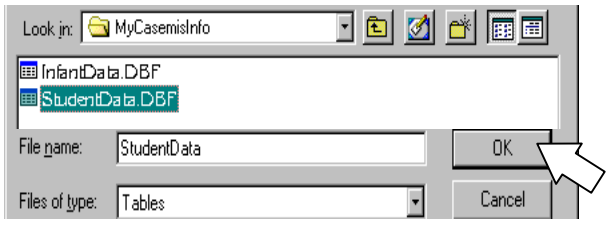


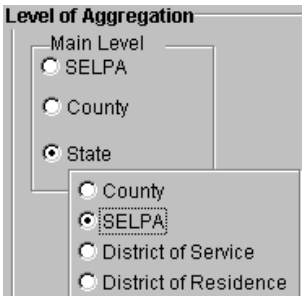
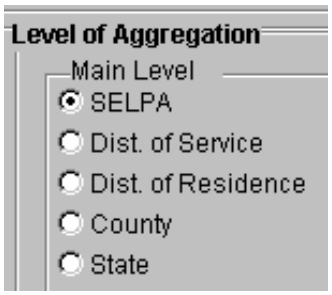
Select the desired report(s) by clicking the report name or the check-box (directly in front of the report name).	
Click Select icon	

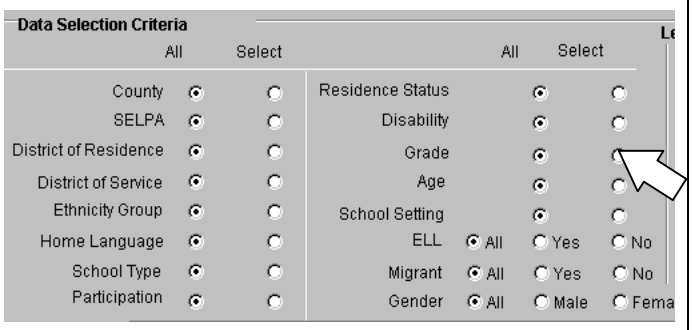
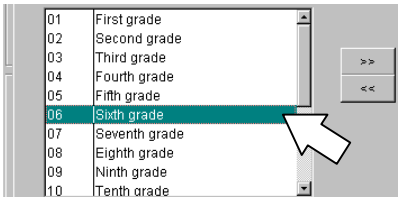
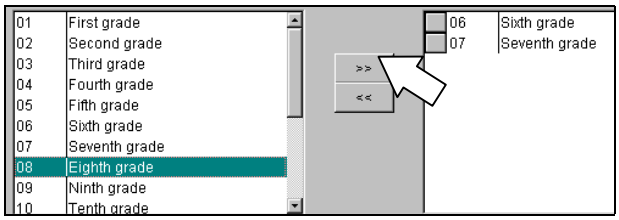
Report Data Source Selection

The Summary and Enrollment Full Reports information selection screens are almost identical.



Action	What is on your screen
Click the Reporting Cycle (adjacent circle to the cycle) **Click the down arrow** . **Select the School Year** from the list that appears	
Only one data selection box will appear, unless a discipline report was chosen. **Click Browse…** Browse... to locate the Student Information file. (Use the 2nd browse button to locate the Discipline file.)	
Locate the data file using normal Windows conventions.	
Double click the file to select it as the data student or discipline source file.	
Click OK OK The pathway (where the data is located) is automatically typed in for you (based on the file you selected).	

Aggregation Level Selection	
The Summary and Enrollment Full Reports aggregation (summaries) are similar. Click the Reporting Level (adjacent circle to the aggregation level)	
A Summary report may be aggregated or totaled at one of three levels.  State level aggregates allows display one additional total level.	An Enrollment Full Report may be aggregated at one of the five levels shown. 

Customizing Reports Through Data Selection	
Automated reports can be tailored to your specific needs. The reports provide a choice of "All" or "Select." The automatic or default report is for "All" data available. However, choosing "Select" will display a screen that lists what information is available for searching. Selecting search criteria narrows what is included in the report (by focusing on the specified data).	
Action	**What is on your screen**
Determine the data for inclusion in the report(s). **Click the circle** in the Select column to the right of the your choice. More than one selection may be made. For example, Grade.	
Highlight the criteria.	
Click the Move button >>. More than one may be selected from the list. The criteria selected in this example will restrict the data to those students who are in 6th or 7th grade.	

Selected choices are listed in the right hand column. These choices may be edited. Highlight the item on the right column to be removed. Click the remove from list button .	
Click OK, to use the criteria or click **Cancel** to discard the criteria .	

SPECIAL EDUCATION PERSONNEL DATA REPORT, 2002-03

Introduction

This file includes the Special Education Personnel Data Report forms and instructions for the 2002-03 school year. These reports are required by the Department of Education in order to comply with the reporting requirements under the Individuals with Disabilities Education Act (IDEA).

Please complete these forms or enter data in the electronic version of the form **as of December 1, 2002.** Read the instructions in this package carefully before completing the forms.

Beginning this year, the CASEMIS software includes a module named Personnel Data Report 2002-03. This module will allow SELPAs to submit their personnel data to state electronically. SELPAs are encouraged to use the electronic format rather than paper forms.

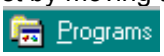
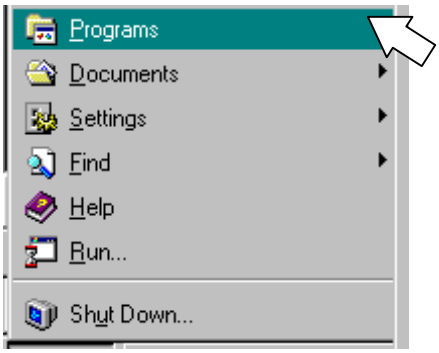
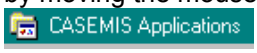
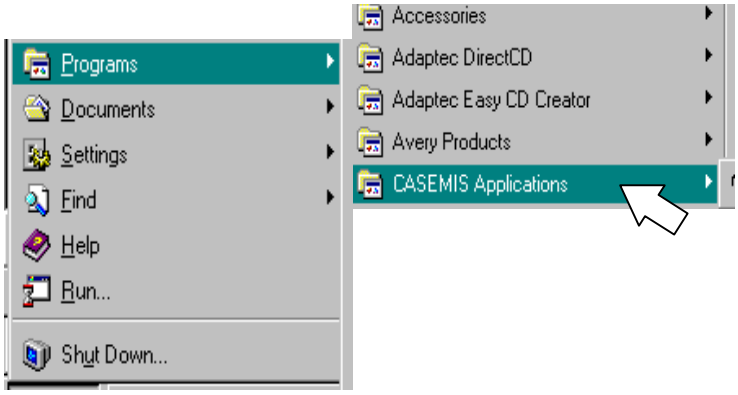
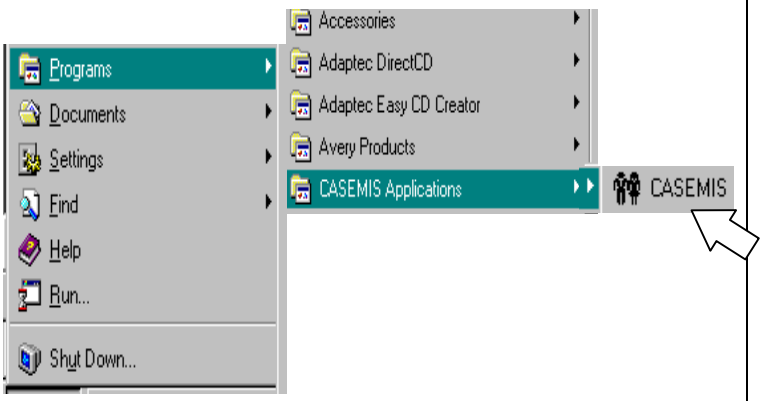
All completed files/forms are due to the Department of Education by **Friday, March 7, 2003.** A complete set shall include one SELPA form and one district form for each district in the SELPA. You may revise your data through **Friday, March 21, 2003.** Make sure that the reported data are accurate. Please send the electronic version of these data to: casemis@cde.ca.gov

You may mail completed and certified paper forms to:

California Department of Education
Special Education Division
Assessment, Evaluation, and Support Unit
660 J Street, Suite 300
Sacramento, CA 95814-3321

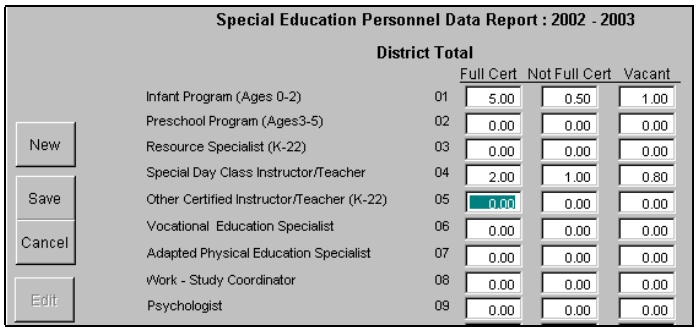
If you have any questions regarding these forms and instructions, please contact Andrew Waskiewicz at awaskiew@cde.ca.gov or (916) 327-3685, or Penny Mak at (916) 327-3651.

Using the CASEMIS Software

Launching the Software	
Action	**What is on the screen**
Click Start on the Windows Task Bar.	
A list of options will display. **Highlight Programs** from the displayed list by moving the mouse arrow over 	
An additional list will display. **Highlight CASEMIS Applications** by moving the mouse arrow over 	
The CASEMIS name will refer to the data cycle the software is programmed for. An sample cycle name is ***CASEMIS December 2002***. **Highlight CASEMIS cycle name** by moving the mouse arrow over …..	

Personnel Reporting Option	
Action	**What is on the screen**
Click Personnel, Personnel (depress the left mouse button rapidly and release).	File Data Entry Tools Extract Personnel Edit Reports
The Personnel Data Report Form will appear. All options are dimmed except for Exit until data is entered.	SELPA List District List Personnel Data Report Special Education Personnel Data Report : 2002 - 2003 District Total Full Cert Not Full Cert Vacant Infant Program (Ages 0-2) 01 Preschool Program (Ages3-5) 02 Resource Specialist (K-22) 03 Special Day Class Instructor/Teacher 04 Other Certified Instructor/Teacher (K-22) 05 New Save
Click the SELPA down arrow, . **Select the SELPA** from the list.	0111 Mid-Alameda County SELPA 0112 North Region SELPA 0113 Oakland Unified
Click the District arrow . **Select the your District** from the list. The New button will darken and is an available option. **SELPAs with SELPA level personnel are to select the SELPA name from the District list. This will create a separate report for these personnel.**	ounty SELPA Special Education Person 2710272 MONTEREY COUNTY SCHOOLS 2765961 ALISAL UNION ELEMENTARY 2765979 BRADLEY UNION ELEMENTARY When a SELPA name is selected for reporting SELPA level personnel a district code of "00000" will display.
Click New, New CAUTION: The software allows data reporting for one district at a time. Selecting a SELPA or District after creating the New data report form will cause an abort of the current data. Data on the screen (other than the SELPA or district) may be changed without losing the information.	New Save Cancel
Print, Exit, and Reset options are always available. However, the remaining options are dimmed (grayed out) until you select a SELPA and district. When a SELPA and a district are selected, the New or Edit option becomes available. New designates that no entries are saved for the district. Edit appears only when there is data saved for the selected district.	

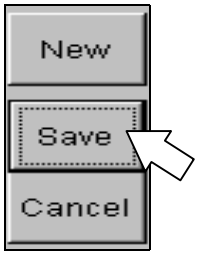
Personnel Entries

Action	What is on the screen
Click into the appropriate box(es) to enter data. CAUTION: Do not TAB key past the last entry box. Any unsaved data will be erased. Refer to the Special Education Personnel Data Report definitions located at the end of this document for term clarification. Column totals are automatic.	 A single click will put a cursor line in the box so you can edit the entry. A double click will highlight the entire contents of the box.

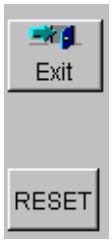
Multi-district SELPAs must create a new data report for each district with special education personnel. S**elect the SELPA**, **select the District**, create a **new** data report, **enter data**, and then **save** the data for each reporting district. Repeat this process until all districts with data are entered.

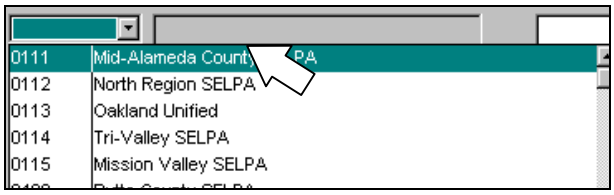
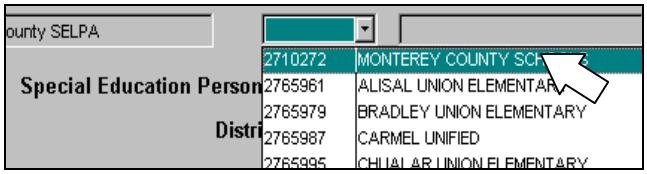
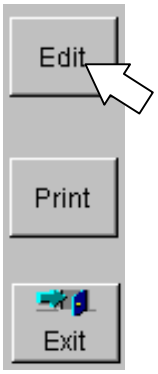
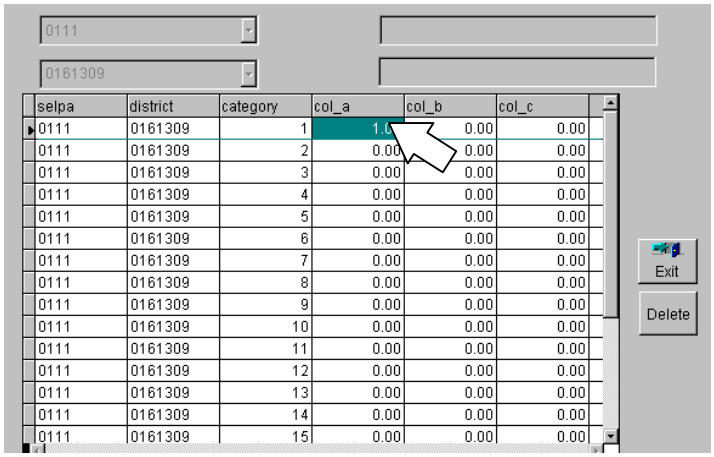
Districts with erroneous entries can be edited before "Saving" the data. See Edit Personnel Entries for editing data after it has been saved.

Save or Discard Personnel Entries

Action	What is on the screen
Click Save, Save, to keep the entries **or** discard the entries by choosing Cancel, Cancel	
Click OK, OK, to close the confirmation screen. All data on the screen will disappear from the current view.	

Starting Over – Destroy All Previously Entered District Data

Action	What is on the screen
Click Reset, RESET, to discard <u>all</u> data on the current screen and previously saved for <u>all</u> districts..	

Edit Personnel Entries	
Action	**What is on the screen**
Click the SELPA down arrow, . **Select the SELPA** from the list.	
Click the District arrow . **Select the your District** from the list. The New button will darken and is an available option.	
Click Edit, Edit, to change saved entries or discard <u>all</u> of the selected district's data. Only one district can be edited at a time. To delete the entire district's information refer to the **Destroy Saved District Data** section.	
Left click the mouse in the box to be corrected. col_a Full Certification col_b Not Full Certification col_c Vacant Refer to the Special Education Personnel Data Report for specific line item number definitions listed under the category column. CAUTION: All edits made on this screen are saved automatically. There is no Cancel option to discard changes.	
Click Exit Exit when done editing the district's data.	

Destroy a Saved District Data	
Action	**What is on the screen**
Click Delete, Delete, to discard all the data currently viewed on the Edit screen. (This does not preclude creation of a New Personnel Data report for the district at a later time.)	Exit Delete
Click Exit Exit when done deleting the district's data.	Exit Delete

Viewing Data	
Action	**What is on the screen**
Click Print, Print, to preview and print the Certification and Personnel report(s). .	Edit Print Exit Work - Study Coordinator 08 Psychologist 09 School Social Worker 10 Occupational Therapist 11 Audiologist 12 Teacher Aide 13 Recreation/Therapeutic Recreation Specialist 14 Diagnostic and Evaluation Staff 15

Print Preview Toolbar and Individual Tool Usage
Toolbar can be moved per Windows protocol.

Print Preview 100%

Show the first page of the report

Move backward one page

GO TO PAGE. Type the page number you wish to view.

Go to Page
Page Number: 1
OK Cancel

Click OK.

Move forward to the next page.

Show the last page of the report.

100% Change the magnification level.

Exit preview.

Print the report.

Click Print, , to print the pages or **Exit** Exit to leave the Print Preview screens.	Print Preview 100%

The software generates a certification page and a one-page report for each district with entered data.

California Department of Education
Form R-30 SE(2002-03)
Certification Page (SELPA)

SPECIAL EDUCATION PERSONNEL DATA REPORT: 2002-03

SELPA REPORT

SELPA Code: 0111 SELPA NAME: **Mid-Alameda County SELPA**

ADMINISTRATIVE UNIT:

CONTACT PERSON : _____ TELEPHONE NO. _____

CERTIFICATION:

I certify that the personnel data on the enclosed pages for the 2001-02 school year for the above SELPA and the districts within the SELPA have been accurately reported following all applicable laws,regulations, and the instructions provided by the

SIGNATURE OF AUTHORIZED OFFICIAL:_____

TITLE OR PERSON:_____ **DATE:** *02/07/03*

IMPORTANT NOTES:

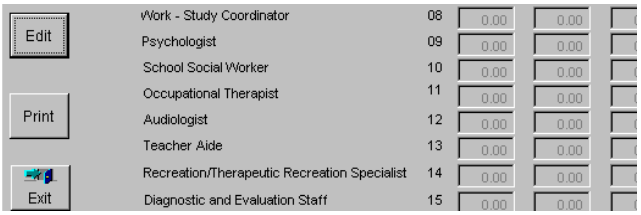
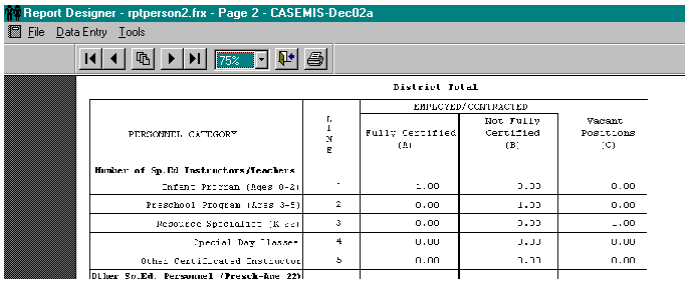
- The data shall be reported as of DECEMBER 1,2002.
- All forms are due to the Department of Education by FRIDAY, March 8,2003.
- Any revision of data must be received by the Department by FRIDAY, March 22,2003.
- SELPA (not the district) shall deliver all forms of the Department as follows:

California Department of Education
Special Education Division
515 L Street, Suite 270
Sacramento,CA 95814-3321

Attn: Assessment, Evaluation and Support Unit

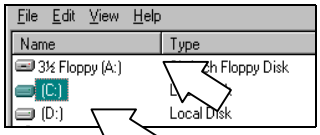
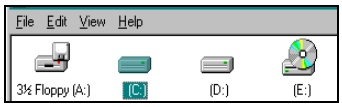
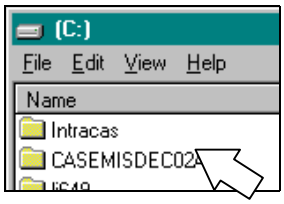
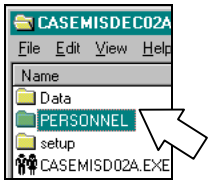
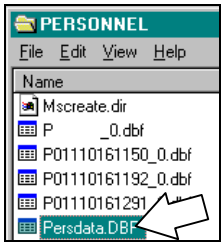
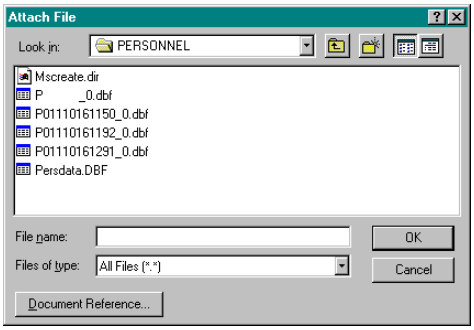
District Total

PERSONNEL CATEGORY	LINE	EMPLOYED/CONTRACTED Fully Certified (A)	Not Fully Certified (B)	Vacant Positions (C)
Number of Sp.Ed Instructors/Teachers				
Infant Program (Ages 0-2)	1	1.00	0.00	0.00
Preschool Program (Ages 3-5)	2	0.00	1.00	0.00
Resource Specialist (K-22)	3	0.00	0.00	1.00
Special Day Classes	4	0.00	0.00	0.00
Other Certificated Instructor	5	0.00	0.00	0.00
Other Sp.Ed. Personnel (Preschool-Age 22)				
Vocational Education Specialist	6	2.00	0.00	0.00
Adapted Physical Education	7	0.00	0.00	0.00
Work-Study Coordinator	8	2.00	0.00	0.00
Psychologist	9	0.00	0.00	0.00
School Social Worker	10	8.00	0.00	0.00
Occupational Therapist	11	0.00	0.00	0.00
Audiologist	12	0.00	0.00	0.00
Teacher Aide	13	0.00	0.00	0.00
Recreation/Therapeutic Recreation	14	0.00	0.00	0.00
Diagnostic and Evaluation Staff	15	0.00	0.00	0.00
Physical Therapist	16	0.00	0.00	0.00
Counselor	17	0.00	0.00	0.00
Speech Pathologist	18	0.00	0.00	0.00
Supervisor/Administrator	19	0.00	0.00	0.00
Interpreter	20	0.00	0.00	0.00
Rehabilitation Counselor	21	0.00	0.00	0.00
Other Professional Staff	22	0.00	0.00	0.00
Non-Professional Staff	23	0.00	0.00	0.00
Total (Lines 1-23)		13.00	1.00	1.00

Printing the Data	
Action	**What is on the screen**
Click Print, Print, to preview the Certification and Personnel report(s). .	
Use navigation icons **to review the entered data.** Refer to earlier procedures to correct any erroneous data.	
Click the Print icon, , to print the Certification and Personnel report(s).	
Click Exit Exit when done.	

- SELPAs are requested to email the electronic version of these data to casemis@cde.ca.gov. (See the following section, **Locating Personnel File**.)
- SELPAs may also fax the completed forms and certification page to (916) 327-3730. NOTE: ONLY the SELPA shall send one certification page for all reporting districts and the SELPA.
- Blank electronic copies of the certification page and personnel report are attached.

Submitting Personnel Data

Locating Personnel File	
The following are general directions to locate the electronic personnel data file for submission through email. Your own email system may differ to attach the file.	
Action	**What is on the screen**
Double click the desktop icon that represents **Your PC.**	
A list of your PC drives . **Double click** on the desktop icon that represents **Your C: drive.**	 OR  Drives are shown in a list or as icons.
Double click the folder where the software was installed. If you used the software default it is on your C: drive. .	 In this example it is named: **CASEMISDEC02A**
Double click the Personnel folder, PERSONNEL.	
Double click the Persdata.DBF file, Persdata.DBF	
Click OK, OK to attach the Persdata.DBF file, or as appropriate for your email system.	

Submitting SELPA Personnel Data and Electronic District Data
Print out the Special Education Personnel Data Report 2002/03 SELPA Total form R-30 SE (2002-03), SELPA Total and Certification Page. Fill-out, sign and fax these to: (916) 327-3730. SELPAs are requested to email the electronic version of the database to casemis@cde.ca.gov (see instructions in the "Submitting the Data" section located in this manual for details).

Form R-30 SE (2002-03)
Certification Page (SELPA)

SPECIAL EDUCATION PERSONNEL DATA REPORT: 2002-03

SELPA REPORT

SELPACODE: __ __ __ __ SELPA NAME: _____

ADMINISTRATIVE UNIT:_____

CONTACT PERSON: _____ TELEPHONE NO: _____

CERTIFICATION:

I certify that the personnel data on the enclosed pages for the 2002-03 school year for the above SELPA and the districts within the SELPA have been accurately reported following all applicable laws, regulations, and the instructions provided by the California Department of Education.

SIGNATURE OF AUTHORIZED OFFICIAL: _____

TITLE OR PERSON: _____ DATE: _____

IMPORTANT NOTES:

- The data shall be reported as of **DECEMBER 1, 2002**.
- All forms are due to the Department of Education by **FRIDAY, MARCH 7, 2003**.
- Any data revision must be received by the Department by **FRIDAY, MARCH 21, 2003**.
- SELPA (not the district) shall deliver all forms of the Department as follows:

California Department of Education
Special Education Division
660 J Street, Suite 300
Sacramento, CA 958144

Attn: Assessment, Evaluation, and Support Unit

California Department Of Education
Form R-30 SE (2002-03)
Page 1 of 1

SELPA Code: __ __ __ __ SELPA Name: _____

SPECIAL EDUCATION PERSONNEL DATA REPORT: 2002-03

SELPA Total

PERSONNEL CATEGORY	LINE	EMPLOYED/CONTRACTED		Vacant Positions (C)
		Fully Certified (A)	**Not Fully Certified** (B)	
Number of Sp. Ed. Instructors/Teachers				
Infant Program (Ages 0-2)	01			
Preschool Program (Ages 3-5)	02			
Resource Specialist (K-22)	03			
Special Day Class Instructor/Teacher (K-22)	04			
Other Certificated Instructor/Teacher (K-22)	05			
Other Sp. Ed. Personnel (Presch – Age 22)				
Vocational Education Specialist	06			
Adapted Physical Education Specialist	07			
Work-Study Coordinator	08			
Psychologist	09			
School Social Worker	10			
Occupational Therapist	11			
Audiologist	12			
Teacher Aide	13			
Recreation/Therapeutic Recreation Specialist	14			
Diagnostic and Evaluation Staff	15			
Physical Therapist	16			
Counselor	17			
Speech Pathologist	18			
Supervisor/Administrator	19			
Interpreter	20			
Rehabilitation Counselor	21			
Other Professional Staff	22			
Non-Professional Staff	23			
TOTAL (Lines 1-23)	24			

California Department of Education
Form R-30 SE (2002-03) District
Page 1 of 1 (District)

SELPA Code: __ __ __ __ SELPA Name: _____

District Code: __ __ __ __ __ __ __ District Name: _____

SPECIAL EDUCATION PERSONNEL DATA REPORT: 2002-03

District Total

PERSONNEL CATEGORY	LINE	EMPLOYED/CONTRACTED		Vacant Positions (C)
		Fully Certified (A)	**Not Fully Certified** (B)	
Number of Sp. Ed. Instructors/Teachers				
Infant Program (Ages 0-2)	01			
Preschool Program (Ages 3-5)	02			
Resource Specialist (K-22)	03			
Special Day Class Instructor/Teacher (K-22)	04			
Other Certificated Instructor/Teacher (K-22)	05			
Other Sp. Ed. Personnel (Presch – Age 22)				
Vocational Education Specialist	06			
Adapted Physical Education Specialist	07			
Work-Study Coordinator	08			
Psychologist	09			
School Social Worker	10			
Occupational Therapist	11			
Audiologist	12			
Teacher Aide	13			
Recreation/Therapeutic Recreation Specialist	14			
Diagnostic and Evaluation Staff	15			
Physical Therapist	16			
Counselor	17			
Speech Pathologist	18			
Supervisor/Administrator	19			
Interpreter	20			
Rehabilitation Counselor	21			
Other Professional Staff	22			
Non-Professional Staff	23			
TOTAL (Lines 1-23)	24			

Manually Filling-Out the Personnel Data
Each special education local plan area (SELPA) and state-operated program (SOP) for the disabled completing these forms shall follow these instructions. Unless otherwise specified, these instructions apply

to both forms in this package. Any reference to SELPA in these instructions includes SOP as well. Specific instructions for completing these forms are provided below.

A. GENERAL

1. Procedures for gathering data for these forms shall be documented and maintained in the SELPA or SOP offices for on-site verification by the California Department of Education or other state and federal agencies.

2. This package contains one form for the SELPA and one for the district/site. Please be sure to write the four-digit SELPA code on each page and the seven-digit district/site code on the district/site pages.

3. A SELPA may report personnel in the SELPA central office using a district form. In such case the seven-digit district code in the form shall be two-digit county code, followed by five zeros.

4. The ***SELPA Total*** form must be the total of all district forms.

5. Questions on these forms shall be directed to Assessment, Evaluation, and Support Unit at (916) 327-3685 or (916) 327-3651.

B. Timelines and Delivery of Forms or Data File

1. The completed forms shall be received by the Department of Education by **FRIDAY, MARCH 7, 2003.**

2. All completed forms must accompany the Certification Page, duly completed by an authorized official of the SELPA.

3. SELPAs may revise their data through **FRIDAY, MARCH 21, 2003.** Note that all revisions must be **received** (not postmarked) by the Department by that date. No revisions will be accepted after this date.

4. SELPAs (not districts) shall mail or deliver all completed and certified forms to:

   California Department of Education
   Special Education Division
   Assessment, Evaluation and Support Unit
   660 - J Street, Suite 300
   Sacramento, CA 95814-3321

   The forms may be faxed to the Department at (916) 327-3730.

5. Data from these forms may also be send as a data table or file according to the following structure (DBF file format) for each category of personnel, including TOTAL (line 24).

Field	Field Name	Type	Width	Decimal
1	SELPA	Character	4	
2	DISTRICT	Character	7	
3	CATEGORY	Numeric	2	
4	COL_A	Numeric	8	2
5	COL_B	Numeric	8	2
6	COL_C	Numeric	8	2

The SELPA may submit one file containing personnel data from all districts or sites within the SELPA. The file may contain data for only those line numbers or **Personnel Category** that have a non-zero entry in the form.

6. The 2002-03 version of the CASEMIS software contains a shell of the Personnel data table for creating and submitting the Personnel Data for a SELPA and the districts in the SELPA. You may access this feature from the ICON toolbar by selecting the button labeled "Personnel." Next, by using the pull-down menus select the SELPA/district for which you will be entering data. For first time data entry for the SELPA or district, select the button labeled "NEW" along the left margin. Data may now be entered as appropriate. When all data for the particular district has been entered, press the "SAVE" button. For additional SELPAs/districts use the pull-down menus and repeat the process. When all data have been entered and are ready to be sent to the State, press the "EXIT" button. The electronic file to be emailed is labeled "PERSDATA.dbf"; which can be located in the CASEMIS??\PERSONNEL directory.

7. The electronic version of the personnel data shall be sent via e-mail to: casemis@cde.ca.gov.

C. Specific Instructions for Columns

Report the number of personnel under appropriate column headings as defined below in full-time equivalent (FTE) of assignment by each type listed under the **Personnel Category**. You may use **up to two decimal places** for each number.

Column A: **Fully Certified.** Report the number of FTE personnel employed or contracted to provide special education and related services **on or about December 1, 2002** who had appropriate State certification, credential or licensure for the position held. Use this column to report staff in personnel categories that do not require certification, credential or licensure, if the staff meet existing State standards or requirements for the position held. This may include persons who hold preliminary credential to provide instruction. Also use this column if No State requirements exist for a particular position

Column B: **Not Fully Certified.** Report the number of ***not fully certified FTE personnel employed or contracted*** to provide special education and related services **on or about December 1, 2002**, who were employed on an emergency, provisional, waiver or other basis, if they did not hold standard State certification, credential or licensure for the position to which they were assigned, or if they did not meet other existing state requirements for the position. This includes persons who do not hold a credential or license to provide instructions. This includes long-term substitutes.

Column C: **Vacant Positions.** Report the number of unfilled vacancies in ***funded*** positions that existed **on or about December 1, 2002**. Do not count personnel included as employed/not fully certified. Do not count vacancies for which funds were not available.

D. Specific Row Instructions

Special Education Instructors/Teachers:

Enter the total number of special education teachers or instructors providing special education services to children in specific program or age group in the district/site. This includes personnel who are employed or contracted, including contracted service providers such as, nonpublic agencies (NPA). It does not include employers of other agencies such as, CCS and Mental Health.

Line 01: Infant Program (Ages 0-2): Enter the total number of teachers or instructors employed or contracted to work with children with disabilities in infant program, primarily for ages 0-2.

Line 02: Preschool Program (Ages 3-5): Enter the total number of teachers or instructors employed or contracted to work with children with disabilities in preschool program, primarily for ages 3-5.

Line 03: Resource Specialist (K-22): Enter the total number of resource specialists employed or contracted to provide special education and related services to children with disabilities from kindergarten through age 22. ***Do NOT include regular education teachers who work with disabled children.***

Line 04: Special Day Class Instructor/Teacher (K-22): Enter the total number of special day class teachers/instructors employed or contracted to provide special education and related services to children with disabilities from kindergarten through age 22. ***Do NOT include regular education teachers who work with disabled children.***

Line 05: Other Certificated Instructor/Teacher (K-22): Enter the total number of other certificated instructors/teachers employed or contracted to provide special education and related services to children with disabilities from kindergarten through age 22. This may include home/hospital instructor, severe disorder of language teacher, inclusion specialist, integration resource teacher, and any other teacher involved in direct instruction. ***Do NOT include regular education teachers who work with disabled children.***

Line 06: Vocational Education Specialist: Enter the total number of vocational education specialists employed or contracted to provide special education and related services to children with disabilities from preschool through age 22.

Line 07: Adapted Physical Education Specialist: *Enter the total number of adapted physical education specialists employed or contracted to provide special education and related services to children with disabilities from preschool through age 22.*

Line 08: Work-study coordinator: Enter the total number of work-study coordinators employed or contracted to provide special education and related services to children with disabilities from preschool through age 22.

Line 09: Psychologists: Enter the total number of psychologists employed or contracted to provide special education and related services to children with disabilities from preschool through age 22. This shall include only non-counseling services provided by a school psychologist.

Line 10: School Social Worker: Enter the total number of social workers employed or contracted to provide special education and related services to children with disabilities from preschool through age 22.

Line 11: Occupational Therapist: Enter the total number of occupational therapists employed or contracted to provide special education and related services to children with disabilities from preschool through age 22.

Line 12: Audiologist: Enter the total number of audiologists employed or contracted to provide special education and related services to children with disabilities from preschool through age 22.

Line 13: Teacher Aide: Enter the total number of teacher aides employed or contracted to provide special education and related services to children with disabilities from preschool through age 22. Do not include teacher aides in infant programs. This shall include all classified aides (e.g., health, behavior, RSP, SDC, in-home, etc.) who provide services to students with disabilities.

Line 14: Recreation / Therapeutic Recreation Specialists: Enter the total number of recreation/therapeutic recreation specialists employed or contracted to provide special education and related services to children with disabilities from preschool through age 22.

Line 15: Diagnostic and Evaluation Staff: Enter the total number of diagnostic and evaluation staff employed or contracted to provide special education and related services to children with disabilities from preschool through age 22.

Line 16: Physical Therapist: Enter the total number of physical therapists employed or contracted to provide special education and related services to children with disabilities from preschool through age 22.

Line 17: Counselor: Enter the total number of counselors employed or contracted to provide special education and related services to children with disabilities from preschool through age 22. This shall include counseling services in special education or services related to IEP provided by a counselor, psychologist, social worker, and others.

Line 18: Speech Pathologist: *Report the number of speech pathologists providing speech services to children with disabilities from preschool through age 22. Note that this category does not include severe disorder of language teachers.*

Line 19: Supervisor/Administrator: Report the number of LEA supervisors or administrators providing special education and related services to children with disabilities from preschool through age 22.

Line 20: Interpreter: Enter the total number of interpreters employed or contracted to provide special education and related services to children with disabilities from preschool through age 22.

Line 21: Rehabilitation Counselor: Enter the total number of rehabilitation counselors employed or contracted to provide special education and related services to children with disabilities from preschool through age 22.

Line 22: Other Professional Staff: Enter the number of other professional staff providing special education and related services to children with disabilities from preschool through age 22. This may include program specialists, classified DIS provider, mobility specialists, other certificated DIS provider, and any other licensed personnel who work with students with disabilities. This category shall include other certificated staff not specifically identified otherwise. Include personnel who provide specialized health services (nurses, psychiatrists, etc.), specialized food service, specialized pupil transportation, etc., and other occupational technicians for children with disabilities.

Line 23: Non-professional staff: Enter the total number of non-professional personnel not already reported and who provide special education and related services to children with disabilities from preschool through age 22. This shall include all classified staff not specifically identified otherwise and are paid out of special education funding.

Line 24:Total: Enter the total number of personnel providing special education and related services for children with disabilities in lines 01-23.