IEP Direct Listings

Making Listings in IEP Direct that are accurate and useful can seem daunting at first. The interface can sometimes be confusing and difficult to understand. But you can learn to make amazingly useful listing by answering two simple questions:

Question 1
What do you want the listing to **find** for you? Be as specific as possible. For instance: "I want this listing to find all of the students in middle school who have a behavior plan."

Question 2
What do you want the listing to **tell** you? For instance: "I want to know the students' name, ID number, grade, what school they go to, and their classification."

Once you can answer those two questions, you're ready to make a listing!

Click on the "Listings" tab and choose "New".

Step 1: Select Display Fields
Start with Question 2 – what you want the listing to tell you. Click on the following items and choose *Add.*
> Student Last Name
> Student First Name
> Student Local ID
> TR Expected Grade
> TR Placement Location 1
> TR Classification

Click *Next Step.*

Step 2: Listing and Field Layout
Choose a name for your listing. Make it as basic and obvious as possible so that you can find this listing again later. We'll name this one Middle School Behavior Plans

You can choose whether it prints as landscape or portrait.

You can change the names of the column headings if you wish.

Click *Next Step.*

Step 3: Grouping and Sorting Layout
In the "Group By" column choose the ONE way you want the information organized – such as: by school, by grade, by student last name, etc.

Click *Next Step.*

This is the complicated step! Once you understand this step, you'll be able to make listings like a pro.

(In this step, you tell the program which students to include and which students to exclude from your listing. The list of criteria to choose from is quite long, and items can be difficult to find. Refer to Appendix A for a complete list of criteria, which section, and helpful notes about the criteria.)

BOX A: The first thing you have to tell it is which year is it looking at?
Equal To: Choose a specific school year from the drop down menu under Criteria. This will tell you all the students who had behavior plans during that school year.

Between: Any two school years. This will tell you all the students who had behavior plans between, for instance, 2014-2018.

Or, if you want to easily and quickly change the listing to display different years, click the box under **Prompt**. This means that before running the listing, the program will ask you which year you want information for.

Now you'll have a listing that will include every single student who has or had an IEP or draft in the year you specify. But you don't want that! You only want the students who currently have an active IEP. So click the *top And* button.

This is where we tell the program to look for only current students. In the dropdown lists, choose SDP Latest Status – Equal to – Receiving Services.

So far your listing looks like this:

Field		Operator	Criteria	Prompt	Remove
School Year *Required		Equal To ▼	Prompt	☑	
	and				
SDP Latest Status ▼		Equal To ▼	Receiving Services ▼	☐	Remove
	[And] [Or]				

[And] [Or]

You have told the program: Look for all students in the year I choose who have active IEPs (they're receiving services.) But that's still too many students. You only want the middle schoolers who have behavior plans.

Click the *bottom And* button. In the dropdown lists, choose: TR Expected Grade – Equal To – Grade 6.

BOX B: Here's the complicated part. You want to find students who are in Grade 6 OR Grade 7 OR Grade 8, right? Click the *top Or* button and in the dropdown lists, choose: TR Expected Grade – Equal To – Grade 7. Repeat for Grade 8. See how the different grades are in their own box?

Now your listing looks like this:

You've told the program: "Find all of the students in the year I choose who have active IEPs **and** are in either Grade 6, 7, or 8."

You're doing great! But we still don't want all of those kids. We only want the ones who have Behavior Plans. Click the *bottom And* button.

BOX C: In the dropdown lists, choose: SC Requires Behavioral Interventions – Equal To – Yes.

Your listing looks like this:

Notice that the three areas are divided into boxes.
Box A: Tell me all the students in the year I choose who have active IEPs …
Box B: … and are in grade 6, or 7, or 8 …
Box C: … and require behavior interventions.

PRO TIP: You cannot put **AND** and **OR** in the same box!

Click *Process.* The program will ask you which year you want to look at (because you chose "Prompt.")

Click *Next.*

Click the little disk icon right away to save your listing!

Click the Excel icon to open your listing.

BAM! Here's a list of all middle schoolers who have behavior plans. The list tells you the students' name, ID, grade, school, and classification. Amazing!

	A	B	C	D	E	F	G
1	Student Last Name	Student First Name	Student Local ID	Expected Grade	Placement Location 1	Classification	
2	BMTMN	FAMDI	2416501	Grade 6	Dr. Ulysses S. Wiggins College Preparatory Lab Family School	Specific Learning Disability	
3	SJNTIIGO-BOUTDIN	MICHJMT	2419708	Grade 6	Dr. Ulysses S. Wiggins College Preparatory Lab Family School	Other Health Impaired	
4	STJNTMY	JMAMJINM	2411493	Grade 6	Henry H. Davis Family School	Specific Learning Disability	
5	AODAIGUMZ	NJ'SIA	2312523	Grade 6	Cooper's Poynt School	Multiply Disabled	
6	POTTJAD	M'ICJH	2312323	Grade 6	Cooper's Poynt School	Multiply Disabled	
7	AICHJADS	JUTMZ	2429199	Grade 6	Yorkship Family School	Other Health Impaired	
8	AJMOS	ISJI	239907	Grade 6	Octavius V. Catto Community Family School	Specific Learning Disability	
9	COAAMJ	SHJKIAJ	249880	Grade 6	Yorkship Family School	Other Health Impaired	
10	GAJHJM	NJSHJWN	2311103	Grade 6	Henry H. Davis Family School	Emotionally Disturbed	
11	MJSSJ	JTMXIS	2412035	Grade 6	Yorkship Family School	Other Health Impaired	
12	STMPHMNS	TJ'QUJN	2411192	Grade 6	Yorkship Family School	Other Health Impaired	
13	WMJAING	ZJMIA	236823	Grade 6	Harry C. Sharp Elementary School	Specific Learning Disability	
14	AMYMS	AMINJTDO	239764	Grade 6	Dr. Ulysses S. Wiggins College Preparatory Lab Family School	Communication Impaired	
15	AUSSMTT	TYDMTT	2412395	Grade 6	Archway Upper School	Multiply Disabled	
16	QUMZJDJ	KMATINM	2326669	Grade 6	Thomas H. Dudley Family School	Specific Learning Disability	
17	VJTM-AOMJN	JDAIJN	239731	Grade 6	Thomas H. Dudley Family School	Specific Learning Disability	
18	FTOAMS	JAJMNIMS	2412478	Grade 6	Charles Sumner Elementary School	Specific Learning Disability	
19	COTON-MJATIN	YJZIA	2312563	Grade 6	Yorkship Family School	Other Health Impaired	
20	OATIZ	AMYNJTDO	2411194	Grade 6	Henry H. Davis Family School	Emotionally Disturbed	
21	SJNCHMZ	GMOAGM	267863	Grade 6	YALE School- Voorhees	Autistic	
22	GOGGINS	MJKJYTJ	229817	Grade 6	R.T. Cream Family School	Specific Learning Disability	
23	CTJSS	JOHN	267843	Grade 6	Thomas H. Dudley Family School	Specific Learning Disability	
24	CTJSS	JJVIMA	218755	Grade 6	Thomas H. Dudley Family School	Specific Learning Disability	
25	KIAKTIND	JIAON	2411451	Grade 6	Dr. Ulysses S. Wiggins College Preparatory Lab Family School	Visually Impaired	

One thing to keep in mind: If you ask the Listing to tell you something like all of the related services the students have, students will be listed once for each related service. If James Jones has speech, OT, and counseling he will be listed 3 times.

IEP Direct Listings Worksheet

Question 1: What do you want the listing to **find** for you?

Find all of the students who:

☐ Are in grade(s): _____   ☐ Have the classification: _____   ☐ Attend school: _____
☐ Case Manager: _____   ☐ Have the related service: _____   ☐ Have a reeval date of: _____
☐ Have an annual review due: _____   ☐ Had a planning meeting on: _____   ☐ Had evaluations completed: _____
☐ _____   ☐ _____   ☐ _____
☐ _____   ☐ _____   ☐ _____

Question 2: What do you want the listing to **tell** you?

☐ First and last name   ☐ Student ID #   ☐ DOB
☐ School   ☐ Case Manager   ☐ Classification
☐ _____   ☐ _____   ☐ _____
☐ _____   ☐ _____   ☐ _____
☐ _____   ☐ _____   ☐ _____

Step 1:
☐ Check each thing that is listed under Question 2 and click *Add.*
☐ Click *Next Step.*

Step 2:
☐ Enter a name for your listing: _____
☐ Choose landscape or portrait (Optional)
☐ Change the names of the column headings (optional)
☐ Click *Next Step*

Step 3:
☐ Choose the way you want the information organized
☐ Click Next Step

Step 4:
☐ Choose the year you want to see, or choose PROMPT (recommended)
☐ Choose the *top AND*
☐ Choose SDP Latest Status -> Equals -> Receiving Services
☐ Choose the *bottom AND*
☐ Enter the information from Question 1. Remember, you can never have **AND** and **OR** in the same box! (The *top And/Or* puts information in the **same** box; the *bottom And/Or* creates a **new** box.)
☐ Click Process

Last Steps:
☐ Click the Save/Disk icon
☐ Click the Excel icon

IEP Direct Listings Worksheet

Question 1: What do you want the listing to **find** for you?

Find all of the students who:
- ☐ Are in grade(s): _____
- ☐ Case Manager: _____
- ☐ Have an annual review due: _____
- ☐ _____
- ☐ _____

- ☐ Have the classification: _____
- ☐ Have the related service: _____
- ☐ Had a planning meeting on: _____
- ☐ _____
- ☐ _____

- ☐ Attend school: _____
- ☐ Have a reeval date of: _____
- ☐ Had evaluations completed: _____
- ☐ _____
- ☐ _____

Question 2: What do you want the listing to **tell** you?

- ☐ First and last name
- ☐ School
- ☐ _____
- ☐ _____
- ☐ _____

- ☐ Student ID #
- ☐ Case Manager
- ☐ _____
- ☐ _____
- ☐ _____

- ☐ DOB
- ☐ Classification
- ☐ _____
- ☐ _____
- ☐ _____

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- ☐ Choose landscape or portrait (Optional)
- ☐ Change the names of the column headings (optional)
- ☐ Click *Next Step*

Step 3:
- ☐ Choose the way you want the information organized
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- ☐ Click the Save/Disk icon
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