

ECATS™ Quick Reference Card

A resource for EC Teachers and Related Service Providers

Logging In

1. To login to ECATS, go to the NCEdcloud IAM Service and select the icon for ECATS.
2. *Note: If you do not have a login to NCEdcloud IAM Service, you need to claim your account or have an NCID account created. Contact your local NCID representative.*

Main Menu & Messages

1. The Main Menu Announcements can be used by your district and NCDPI to post messages and add information regarding updates or scheduled site maintenance.
2. The Resources section at the bottom of the page has school district and PCG reference materials that you can download.
3. The “Send Us a Message” link is the most secure way to ask questions, give suggestions, or report issues. Simply click the “Send Us a Message” link at the top of the page and you will then be taken to the ticket submission process.
4. Due to FERPA/HIPAA requirements, please always use ECATS Messages when needing to exchange confidential information. *DO NOT use email to send student information.*
5. To review submitted messages, click the Message Board link.

Adding Multiple Student(s) to Your Caseload

1. Click the “Wizard” tab at the top of the page.
2. Click the ‘Caseload Setup Wizard’ link.
3. Click the ‘Add More Students to Caseload’ button.
4. Search for students by providing criteria such as Last Name or Student ID. Click ‘View Students’.
5. Select the student(s) to add to the caseload by checking appropriate box.
6. Scroll to the bottom and click the appropriate button to save your selection(s).
7. To remove a student from your caseload, follow steps 1 & 2 above, then uncheck the box next to the student’s name and click the ‘Update the Database’ button.

Completing a Student’s IEP

1. From the Main Menu, click the “Students” tab.
2. Either search for a specific student by entering their Last Name, Student ID or other information *or* scroll to bottom and click ‘View My Caseload’.

- The student’s name will not appear on your caseload unless you have been added as IEP Team Member for that student. To add yourself to a student’s IEP Team, follow the “Team Tab” instructions below.
3. Choose the specific student by clicking on their blue hyperlink name.
 - *From here, an additional menu will appear!*
4. Fill out the following tabs to complete the IEP Process for the specific student.

Adding Users to IEP Team:

1. Select the “Team” link from the Student Information dropdown
2. Select the Case Manager (if you have permission) from the dropdown menu. If you are the Case Manager, your name will appear here.
3. Click the ‘Select IEP Team’ button to add IEP Team Members.
4. To add an IEP Team Member, simply check the box next to the left of the name.
 - Parents associated with the student will appear in the first table. Staff members directly associated with the school will appear in the second table. Other potential team members will appear in the third table.
5. Click the ‘Update the Database’ button.

Student Profile Tab:

1. From the “EC Process” dropdown menu, select the “IEP” link.
2. Document the student specific information in the text fields provided on the *Student Profile* screen.
3. Always click “Save & Continue” before moving to the next screen.

Present Levels Tab:

1. Click the ‘Present Levels’ button.
2. Enter the text of the specific present level(s) into the text box(es).
3. Enter any additional information in the boxes.
4. Click ‘Save & Continue’.

Special Factors Tab:

1. Select the appropriate responses from the dropdowns and checkboxes provided on the Consideration of Special Factors screen.
2. If the student is deaf or hard of hearing, create a communication plan by clicking the ‘Communication Plan Worksheet’ button.

Secondary Transition Tab: (Beginning at Age 14)

1. Enter the student specific information in the *Secondary Transition* table.
2. Enter the student specific information in the *Postsecondary Goals and Supports* table.
3. In the *Transition Area* section, select each appropriate tab and add the student specific services, documenting each required field.
4. Click ‘Save & Continue’ once more.

Annual Goals Tab:

1. Click the 'Annual Goal' button.
2. Note that the area(s) of need and present level(s) are here.
3. Click the 'Add/Delete Goals' button under Details.
4. Click 'Add Goals' and enter the area specific goal(s).
5. Click 'Save & Continue'.
6. For each goal entered, click 'Goal Details/Objectives' to enter required information.

Services Tab:

1. Click the 'Services' button.
2. Enter all information regarding service delivery, related service delivery, special transportation, Least Restrictive Environment, etc.
3. Click 'Save & Continue'

Accommodations Tab:

1. Click 'Add Classroom Activity' and select each area needed. Then scroll down to select the correct participation level.
2. Click 'Save & Continue'. Then select the appropriate accommodation(s) and click 'Save & Continue' again.
3. Select the appropriate location (for class activities only).
4. Follow the same process for district and state.
5. After all accommodations are added, if any require implementation specifications, click 'Add Implementation Specifics' and add required detail.
6. Click 'Save & Continue' and then click 'Save & Continue again'.

Services Goal Integration Tab:

1. Enter the date and select the services that apply.
2. Complete the remaining fields.
3. Click the 'Save & Continue' button.

ESY Services Tab:

1. Check the top box to have this print at the end of the IEP when a decision is made.
2. Select the appropriate circles 'Yes' or 'No' in response to the ESY Eligibility questions.
3. Enter eligibility information including determination date, participation start date, and end date (if eligible).
4. Click either 'Add ESY Special Ed Service' or 'Add ESY Related Services' based on the student's needs.
5. Select the service the student will require during ESY. Click the 'Save & Continue' button.
6. Choose the *Number of Sessions* and *Session Length*.
7. Choose the *Service Location* from the dropdown menu.
8. Click the 'Save & Continue' button.

ESY Services Goal Integration Tab:

1. Follow the same steps found for *Service goal integration tab*.

Create Draft and Create Final:

1. Enter all appropriate dates as per your district's policy.
2. Select the appropriate meeting purpose.
3. Fill out any necessary remaining information.
4. Click 'Create IEP Draft'.

- A Draft document with no system errors must be completed before Final document can be created.
 - All Drafts will print with a 'Proposed' watermark on each page except for the signature page. Draft PDFs are saved in ECATS for 30 days.
5. Once an error free draft is created, a final can be created through the 'Create Final' link. Final documents remain in the system permanently. Contact district administrators for deletion requests.

Documents Tab:

1. Click the radio button next to the document name to select the type of document you would like to create.
2. Click 'Create Draft' or 'Create Final Document'.
3. Complete all custom data information pertaining to the specific document.
4. At the bottom of page, click 'Create Draft Document' or 'Create Final Document' button. The document will appear in the *Documents Created* list on the student's *Documents* tab.
5. To view a document, click the blue hyperlink label, which will open the viewable, non-editable file.
 - To print the document, choose the *Print* icon in the toolbar.
6. To exit the PDF, click any of the menu buttons at the top of the screen. DO NOT close your browser.

Logging Out

****Always Log Out and Exit the Browser ****

1. Click the "Log Out" tab on the menu bar.
2. After you log out, close your browser.
 - Click *File* in the upper left hand corner of your screen and then choose *Exit*.
 - Mac users - Click the in upper left hand corner of screen.
 - PC users - Click 'X' in upper right hand corner of screen.
 - ***If you do not log out and close your browser, anyone can access information or record information under your log-in name.***