

Special Education FormMatrix

User Guide

Quick Access

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For online help, visit <http://www.seformmatrix.com/support>

Introduction

Special Education FormMatrix is a computer system for managing your special education paperwork. The program is optimized for use on a Windows PC with a monitor screen resolution of 800 x 600. It works in Windows 9x, ME, NT, 2000, and XP. When you place the program CD in your CD drive, the installation program automatically will start up. By default, the program will be installed on the computer's C drive. During the installation process you have the option of changing the location for the program files. (You also can install to and run the program from a network folder.)

With this system you can create, edit, print, and store records and forms for each of your students. Much of the information you will need to provide in the forms is available through pop-up lists, check boxes, and radio buttons with predefined values. This reduces the time needed to type in information and helps ensure that all required information is included. State instructional standards, which are required in IEPs, are available with the click of the mouse.

IMPORTANT! In order to comply with federal and state regulations when using this program to create IEPs, you must make it clear to parents at the start of all IEP meetings that you are presenting a draft IEP and that the proposed services are only recommendations for review and discussion with the parents. Parents have the right to bring questions, concerns, and recommendations to IEP meetings. Before the IEP is finalized, there must be a full discussion with the child's parents about the drafted IEP, the child's needs, and the services to be provided to meet those needs.

Getting Started

Special Education FormMatrix has multiple ways for doing the same thing. Within this user guide, the most convenient ways are presented. Most of the program functions you normally will use are included in the **Menu Bar** located at the top of each form. (See Figure 1.) Other functions are available from the Menu at the top of the screen. You can view, add, change, omit, or delete records in your file. The program automatically saves the changes you make to your file as you work.

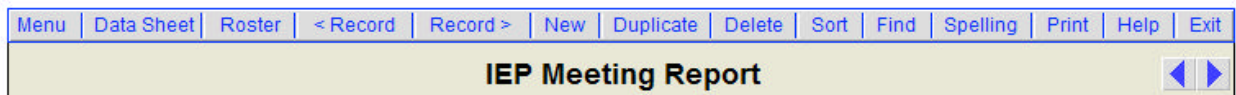


Figure 1 Top menu bar and navigation buttons

A **field** is the basic unit of data entry in a record. A field holds data you type in or select from predefined value lists. Some fields display the results of calculations on data in other fields. You cannot directly enter data into calculation fields. All fields in which you can enter data have a white background. Each set of fields on a form is called a **record**.

Some forms contain **blue text** that, when clicked, opens a window that displays references to relevant federal and state regulations. If the message window does not display all of the information, you can resize it with the mouse, and you can drag it to another location on the screen.

It is a good idea to regularly make a backup of your file. Clicking the **Backup File** button in the **Reference** section of the **Main Menu** will allow you to easily do this. The backup file will be named **Matrix Copy.USR**, and it will be placed in the Special Education FormMatrix folder. If your main file becomes damaged and cannot be repaired, you can delete it and then rename the backup file **Matrix.USR** in order to restore your student records.

Always use the **Exit** button in the **Menu Bar** to close the program in order to ensure that no data is lost. Power failures, hardware problems, or shutting down the program improperly can damage the FormMatrix database. If the database becomes damaged, press the **Ctrl** and **Shift** keys while double clicking the SE FormMatrix desktop icon.

Hold the keys down until you see the **Open Damaged File** window. In the **Look in** window browse to the folder containing the FormMatrix files and select the **Matrix.USR** file. The repair program then will rename the file **Matrix Old.USR** and create a repaired **Matrix.USR** file (if possible).

Navigating Through the Program

You can use the **Main Menu** to access links to all of the special education forms as well as reports, reference information, and other program features. Whenever you move the mouse pointer over a button (link), it will change to a hand cursor. All of the main special education forms have **blue navigation** buttons in the upper right hand corner of the form. When clicked, the **left arrow** button will take you to the previous form in sequence, and the **right arrow** button will take you to the next form in sequence. The **red square** button in the upper right hand corner of each IEP Annual Goals and Objectives form will take you to the Supplemental Goals and Objectives.

The **bottom bar** on each form displays the number of found records, the total number of records, the name or number of the form being displayed, the current student record being displayed and blue navigation buttons. When clicked, the **left arrow** button will take you to the previous form in sequence, the **square** button will take you to the **Main Menu**, and the **right arrow** button will take you to the next form in sequence. (See Figure 3.)



Figure 3 Bottom bar displays of record information and navigation buttons

You can move to the previous or next student record by clicking the **<<Record** or **Record>>** buttons in the **Menu Bar**. Alternatively, you can press the **Ctrl** and **Down Arrow** keys to move to the next student record, and the **Ctrl** and **Up Arrow** keys to move to the previous record. You can move to a field in a record by clicking in the field where you want to enter data. Press the **Tab** key to move to the next field, and press the **Shift** and **Tab** keys to move to the previous field.

To find a student record, go to the form you want to use to find a record. Click **Find** from the **Menu Bar** or press the **Ctrl** and **F** keys. The form will change so there is no information in any of the fields. Click or tab on the appropriate field, type in your request, or select your request from any field that has a popup menu. Click the **Find** button again or press **Enter**. The record or records with data matching your request are added to the found set of records, which is the subset of records being browsed. You then can work with just the records in the found set. To once again show all records, press the **Ctrl** and **J** keys. You also can find records that have the same information in more than one field. For example, if you want to find all students who are in the 6th grade and classified as SLD, go to the **Student Roster**, click **Find**, put SLD in the **Category** field and 06 in the **Grade** field. Click **Find** again, and all of the matching records will be visible.

The icons at the bottom left corner of the document window allow you to switch among the **Browse**, **Find**, and **Preview** display modes. (See Figure 4.) You also can select display modes by pressing the **Ctrl** and **B** keys (Browse), the **Ctrl** and **F** keys (Find), and the **Ctrl** and **U** keys (Preview). The **Zoom in** and **Zoom out** icons enlarge and reduce the screen image respectively. You also can zoom in by pressing the **F3** key, and zoom out by pressing the **Shift** and **F3** keys.

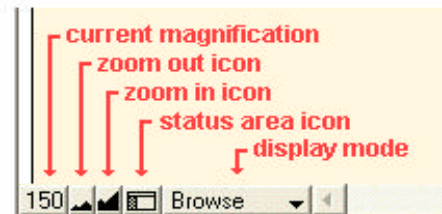


Figure 4 Bottom left icons

An alternative way to display, find, and move through records is by using the **status area**. (See Figure 5.) You can open or close the status area by clicking the status area icon in the bottom left corner of the screen or by pressing the **Ctrl** and **Shift** and **S** keys. The status area appears at the left of the document window and displays a book icon and status information. With the status area open, you can move from one record to another by clicking the book icon. Click the bottom page of the book for the next student record. Click the top of the book for the previous record.

You can conveniently sort records using the **Student Roster**. Click the **Sort** button in the **Menu Bar** or right click any field name in the Student Roster and select **Sort** from the popup menu. The default sort order is displayed in the right window of the **Sort Records** window. To change the sort order, move the mouse over the **up-down arrows** that appear just before the field name. The mouse cursor will change to an up-down arrow symbol. Click the mouse and drag the field name to the top of the sort order list, then click the **Sort** button.

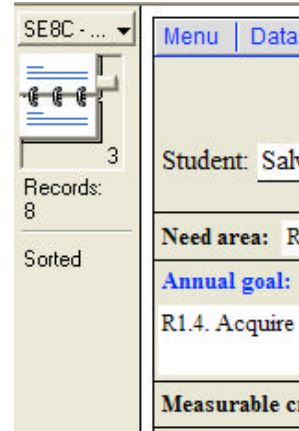


Figure 5 Status area

Entering Information

When you first install the program, you cannot enter student information until you create a new record. Click the **New** button on the **Menu Bar** to add a new student record and the **Delete** button to delete an existing record. You also can add a new record by pressing the **Ctrl** and **N** keys, and delete a record by pressing the **Ctrl** and **E** keys. **IMPORTANT:** You cannot retrieve deleted information, and you cannot

undo the action of deleting records. Before you delete records, consider making a backup copy of your file.

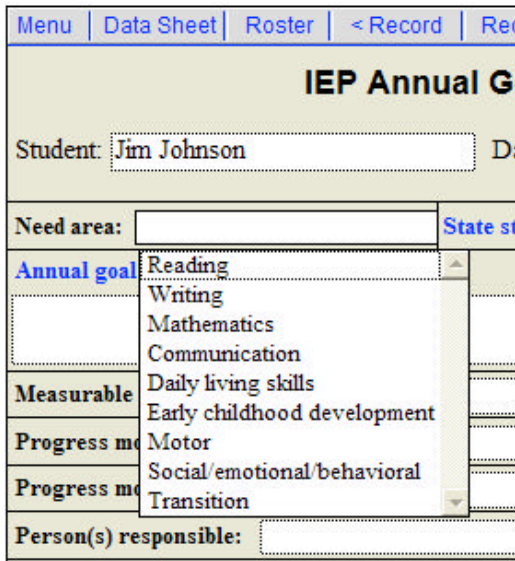


Figure 6 Example popup menu list

You add information to your file by entering data in records. You can type information into fields using the computer keyboard; enter preset information from value lists that appear as **pop-up lists**, **check boxes**, or **radio buttons**; and copy and paste information. (See Figure 6.) It is best to first fill out all of the information about a new student on the **Student Data Sheet**. By doing this, each form that includes that information will display it for you automatically.

For fields that display checkboxes, click each box you want to select to place an **X** in it. Click the box again to remove the **X**. To undo a radio button selection, click the field containing the button, and then press the **Del** key twice. To choose a predefined value from a pop-up list, click the field and then click the value from the pop-up list. To enter a value that isn't included in a value list, click the data field twice and then type in the new information. Deselect a list by pressing **Esc**, clicking the field again, or clicking on the form where there isn't a field.

You must enter dates into fields using a four-digit year, e.g. **1/7/2004**. Enter student names in the following format: **Jane Doe**. The program will automatically determine the student's first and last name.

You also can enter text information from another program into a field. For example, if you have a goal or objective in a Word file, you can copy and paste it into the appropriate field on the goals and objectives form. The IEP Additional Information Form is available for any IEP data that will not fit in the other forms. If the text you enter into a field is a little too long for the field, you can reduce the font size so it will fit. First set the display size to **100%** using the **Zoom** control in the bottom left corner of the screen. (150% is the default setting.) Select the text, click **Format** from the top menu, click **Size**, and select a smaller number. A 9-point font is recommended as the smallest font size to use for readability.

Editing Information

You can edit many of the field popup lists. Open a popup list and scroll to the bottom. If **Edit** is listed, click it to open an edit window. Then, just like in a word processor, you can change or delete any of the menu items, reorder the items, and add new ones.

You can duplicate a record (all of the forms for a student) by using the **Ctrl** and **D** keys or using the **Duplicate** button on the **Menu Bar** when you are viewing that record. If you want to save a student's original records when, for example, you are preparing to write a new IEP and change other forms for the student, first duplicate the original record, rename it, and then export it to a new file. Maintaining duplicate records in your main file is not recommended because it will result in erroneous information in the **Summary Student Records Report**.

By using the **Spell** button on the **Menu Bar**, you can check spelling in a selected field, text in the current record, or text in a found set of records. By clicking **Learn** in the **Spelling dialog box**, you can add words not already in your user dictionary. To edit your user dictionary, go to the top **Edit** menu, select **Spelling - Edit User Dictionary**, and then select the option you want. You also can set spelling options, such as having the program check your spelling as you type, by going to the top **Edit** menu and selecting **Preferences - Document**. Then click the **Spelling** tab and select the options you prefer.

Printing

Special Education FormMatrix prints forms to the default printer configured for your computer. If you want to change the default printer, select **Print Setup** from the top **File** menu, then in the **Name** box, select the new printer. You can print forms by selecting the **Print** button from the **Menu Bar**. A **print dialog box** then will appear. (See Figure 7.) You also can print by pressing the **Ctrl** and **P** keys or, to skip the print dialog box, press the **Ctrl** and **Shift** and **T** keys. To preview a form, choose **Preview** from the **display mode icon** in the bottom left corner of the screen or press the **Ctrl** and **U** keys to see an approximation of how the form will look when printed. You usually will want to select **Print the current record** from the print window. Doing this will print the record currently being displayed.

You also can select two other options: **Records being browsed** will print the displayed form for all of your students; **Blank record, showing fields** will print the current form with no information in the fields. When you print a tabular report, such as the **Student Roster**, you must select **Records being browsed** in order to have all of the student records appear in the report. After printing a report, remember to select **Print the current record** in order to print single forms.

For the IEP forms, you have the option of printing the current form or a set of forms. To do this, select the **Print** button from the **Menu Bar** while displaying any of these forms. Then click the **Current** button to only print the form displayed. Click the **Group** button if you want to print multiple forms. Once clicked, all of the forms that can be printed together will be displayed. Click the box for each form you want to print.

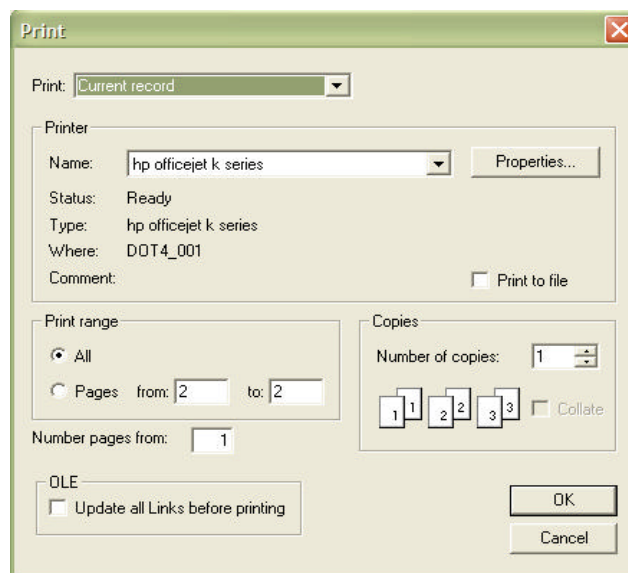


Figure 7 Print dialog box

Importing and Exporting Records

There are many options for importing and exporting records. The following instructions describe the most common use of this feature - importing and exporting entire sets of records to files that can be used by another Special Education FormMatrix program:

Export Records:

1. Use **Find** from the **Menu Bar** to select the records you want to export.
2. Choose **Export Records** from the **File** menu at the top of the screen.
3. In the **Export Records to File** window, select a location for the file in the **Save in** box, and type a name for the file in the **File name** box. (See Figure 8.)
4. Make sure the **Save as type** box says **FileMaker Pro Runtime Files (*.USR)**.
5. Click the **Save** button.
6. In the **Specify Field Order for Export** window, click the **Clear All** button, then click the **Move All** button. (See Figure 9.)
7. Make sure that the **Character Set** box says **Windows (ANSI)** and that the **Don't format output** radio button is checked. (These are the default settings.)
8. Click the **Export** button.

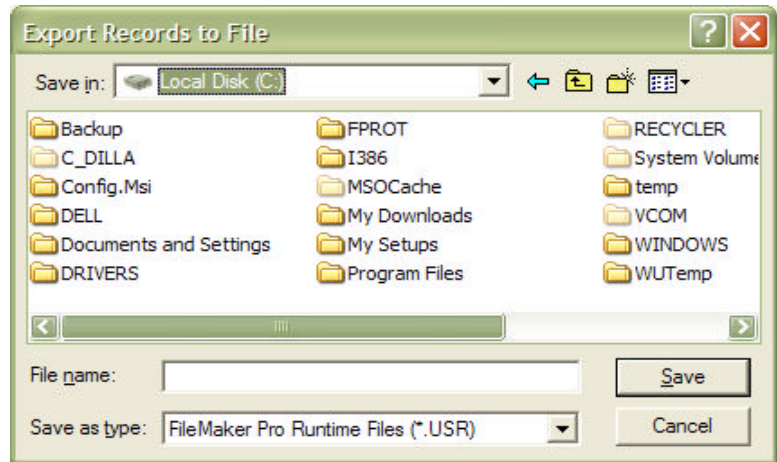


Figure 8 Export records to file window

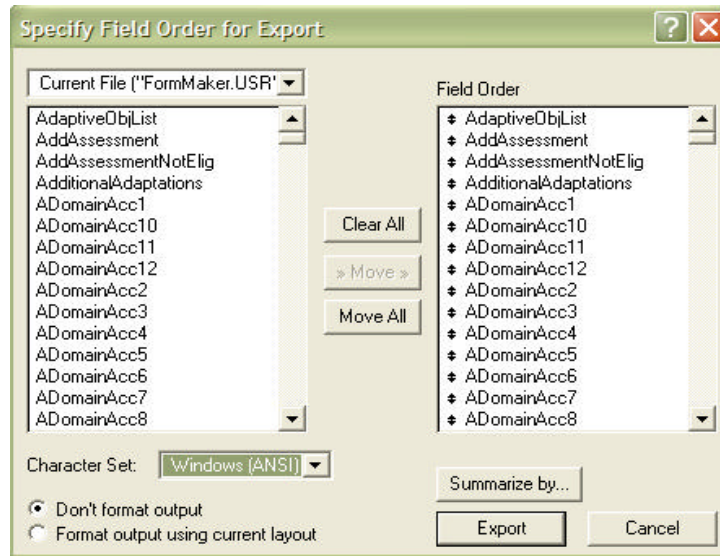


Figure 9 Specify field order for export window

Import Records:

If you are replacing or updating records, first make a backup copy of your database. (Replacing and updating overwrite data in your file and cannot be undone.)

1. Choose **Import Records** from the top **File** menu.
2. In the **Open File** window, make sure the **Files of type** box indicates **FileMaker or FileMaker Runtime Files**. (See Figure 10.)
3. Locate the file to import in the **Look in** box, and then click it to insert it in the **File name** box. Click the **Open** button.

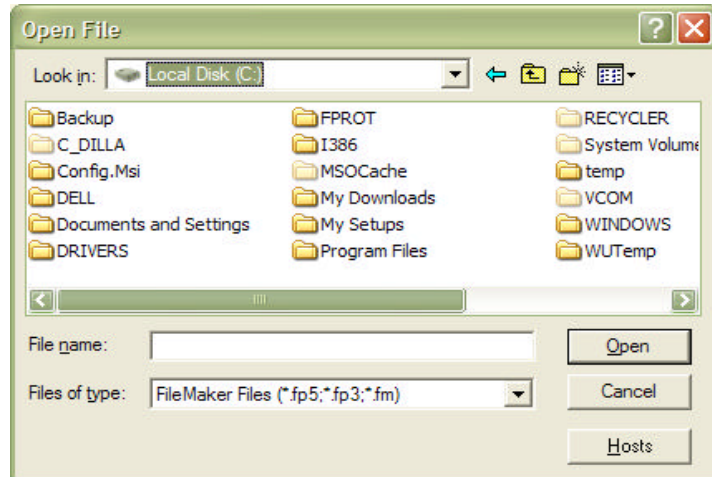


Figure 10 Open file window

4. In the **Import Field Mapping** window, make sure the **View by** box indicates **matching names**. (See Figure 11.) Then for the **Import Action**, choose either **Add new records** to add new records to your database, or **Replace data in current found set** to replace student records in your database with records from the import file.
5. In the **Import Options** window, use the default setting (**Perform auto-enter...** box is unchecked). Click the **Import** button. (See Figure 12.)

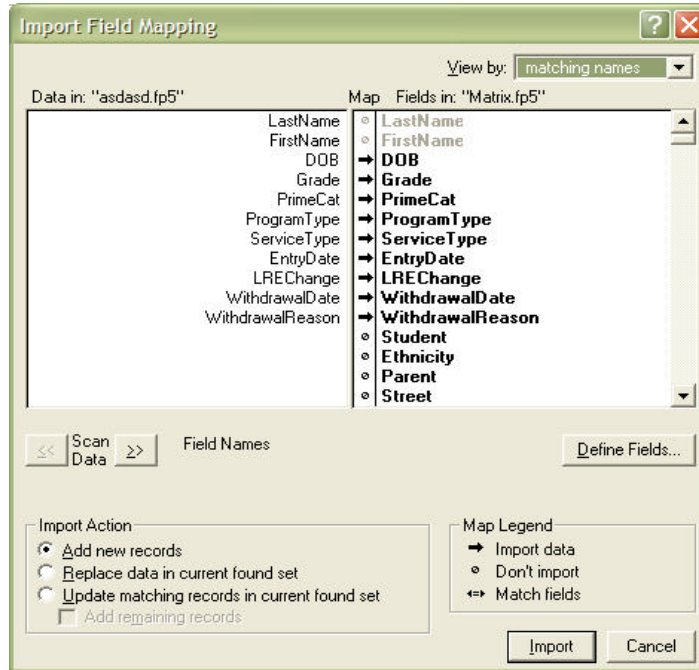


Figure 11 Import field mapping window

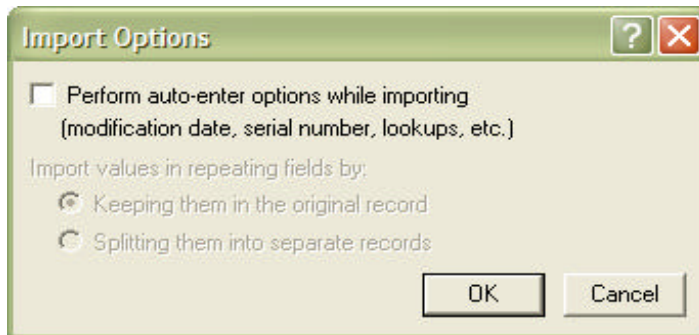


Figure 12 Import options window

Using Arizona Academic Standards

The **Arizona Academic Standards** are a required component in every IEP. **Reading**, **Writing**, and **Math** standards are currently available at all grade levels, and **Early Childhood Education** standards are available for the preschool level. Other standards use the following levels:

- Functional (F)**age 3-21
- Readiness (R)**grade K
- Foundations (FS)**.....grades 1-3
- Low Essentials (E45)**.....grades 4-5
- High Essentials (E68)**.....grades 6-8
- Proficiency (P)**grades 9-12

On the **Goals and Objectives** forms you can use pop-up lists to select goals based on state standards, and objectives based on state performance objectives. State goals and objectives are not available for every need area and for every level. Goals and objectives based on state standards are available as follows:

Need area.....State standard (Levels available)

- Reading.....Reading Process (K – 12)
- Reading.....Comprehending Literary Text (K – 12)
- Reading.....Comprehending Informational Text (K – 12)
- Writing.....Writing Process (K – 12)
- Writing.....Writing Elements (K – 12)
- Writing.....Writing Applications (K – 12)
- Math.....Number Sense and Operations (K – 12)
- Math.....Data Analysis, Probability, & Discrete Mathematics (K – 12)
- Math.....Patterns, Algebra and Functions (K – 12)
- Math.....Geometry and Measurement (K – 12)
- Math.....Structure and Logic (K – 12)
- Communication.....Listening & Speaking (FS, R, F, E45, E68) ¹
- Motor.....Physical Activity (R, F)
- Self-help/adaptive.....Comprehensive Health Education (FS)
- Social/emotional/behavioral.....Workplace Skills (R, F, E45, P)
- Social/emotional/behavioral.....Comprehensive Health Education (R, F, E45, E68, P)
- Transition.....Workplace Skills (R, F, E45, E68, P)
- Early Childhood Development.....American History (preschool)
- Early Childhood Development.....Approaches to Learning (preschool)
- Early Childhood Development.....Civics and Government (preschool)
- Early Childhood Development.....Data Analysis (preschool)
- Early Childhood Development.....Dramatic Play (preschool)
- Early Childhood Development.....Economics (preschool)
- Early Childhood Development.....Geography (preschool)
- Early Childhood Development.....Geometry and Measurement (preschool)
- Early Childhood Development.....Health (preschool)
- Early Childhood Development.....Inquiry (preschool)
- Early Childhood Development.....Knowledge of Self (preschool)
- Early Childhood Development.....Number Sense and Operations (preschool)
- Early Childhood Development.....Oral Language Development (preschool)
- Early Childhood Development.....Patterns (preschool)
- Early Childhood Development.....Physical & Motor Development (preschool)
- Early Childhood Development.....Pre-Reading (preschool)
- Early Childhood Development.....Pre-Writing (preschool)
- Early Childhood Development.....Responsibility for Self and Others (preschool)

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Early Childhood DevelopmentSafety (preschool)
Early Childhood DevelopmentSocial Interactions with Others (preschool)
Early Childhood DevelopmentStructure and Logic (preschool)
Early Childhood DevelopmentVisual Art (preschool)
Early Childhood DevelopmentWorld History (preschool)

¹ State performance objectives are available only at the Functional level.

You can access a set of supplemental goals/objectives in Special Education FormMatrix by clicking the **red square** button in the upper right hand corner of each IEP Annual Goals and Objectives form. The goals/objectives for each need area appear in scrollable windows. You can copy any of these goals/objectives, click the appropriate button to return to the goals and objectives page you were working on, and then paste the goal or objective into the appropriate field. You also can edit the supplemental goals/objectives in order to have a set that suits your preferences. Within each need area window, just like in a word processor, you can change, delete, add, and reorder goals/objectives. The changes you make will remain when you exit the program.

Appendix 1

Keyboard Shortcuts

Command name	Modifiers	Key	Menu
Browse mode	Ctrl	B	View
Duplicate record	Ctrl	D	Records
Copy	Ctrl	C	Edit
Current date	Ctrl	-	Insert
Current time	Ctrl	;	Insert
Current user name	Ctrl Shift	N	Insert
Cut	Ctrl	X	Edit
Delete record	Ctrl	E	Records
Next field	Tab		
Next record	Ctrl	Down arrow	
Omit record	Ctrl	M	Records
Paste	Ctrl	V	Edit
Previous field	Shift	Tab	
Previous record	Ctrl	Up arrow	
Print	Ctrl	P	File
Print (without print dialog)	Ctrl Shift	T	
Print preview	Ctrl	U	View
Quit program	Ctrl	Q	File
Select all	Ctrl	A	Edit
Sort records	Ctrl	S	Records
Status area (open/close)	Ctrl Shift	S	View
Show all records	Ctrl	J	Records
Text (left justify)	Ctrl	[Format
Text (center)	Ctrl	\	Format
Text (right justify)	Ctrl]	Format
Text (full justify)	Ctrl Shift	\	Format
Zoom in		F3	
Zoom out	Shift	F3	

Appendix 2

Ways to Find Information in Data Fields

To find	Example
words that start with specific characters: type in the characters	Har finds Harry and Harold
a phrase: type in the phrase between quotation marks	"SLD resource" finds SLD resource
words with one or more unknown characters: type in @ for each unknown character	Gr@y finds Gray and Grey
words with zero or more unknown characters in a row: type in * for all unknown characters	Jo*n finds Jon and John
values less than a specified value: use <	<12/31/2002
values less than or equal to a specified value: use <=	<=102369
values greater than a specified value: use >	>12/31/2002
values greater than or equal to a specified value: use >=	>=12/31/2002
values within a specified range: use .. or ...	1/1/2003..5/20/2003
empty fields: type = in the field	=
fields that are not empty: type * in the field	*