

PSSP Quick Tips: Creating an IEP Invite

- Select a **Student**.
- Click on **Documents** icon next to student's name (looks like pages).
- Once you are on the student's documents page you will see a list of documents for the student and also the option to **Create a New Document**.
- To Create a New Document you can see a list of documents by:
 - Hovering over the drop down menu
 - Clicking on downward arrow
 - Typing the document you want
- Select **Invitation to Attend IEP Team Meeting** and Click **GO**.
- Select **New**—You can add a Label/Comment such as “Moved from _____”, “Transition”, or none.
- Fill out **Contacts, Method of Contact, Result of Contact** with drop down menus.
- **Insert Statements** are statements that can be used to fill in areas of the document. When you select an insert statement it will cross out in the list. You can choose more than one. Click the close window box at the right hand corner to exit and go back to your document.
- **Lookup/Non-Lookup**—**Lookup** are PSSP staff that can be looked up and added to the document from PSSP database. **Non-Lookup** are staff that are not in the PSSP database and need to be typed in.
- Check the box next to the parent or parents that you would like to invite.
- Select **Purpose of the IEP**.
- Select other **Invitees**.
- When finished Click **Save, Done Editing**.
- You have the option to **Edit, Print, Send Message**.
- **Send Message** will send the invite via PSSP email. There is an option to select staff referenced in the document to send the invite with a message.
- Set **Document Status** is a drop down menu to set the status for Review or Final. *Once a document is final, it can't be edited.