

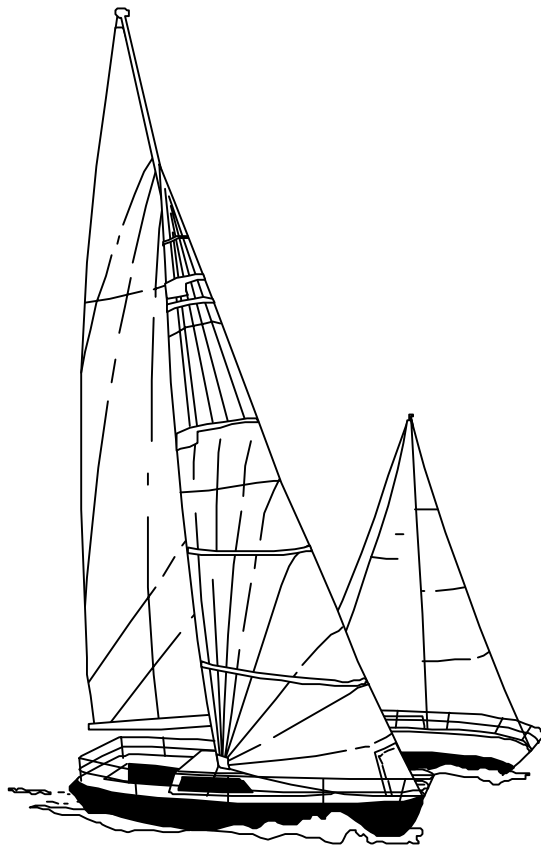
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*Tranquility*<sup>®</sup>

# **Special Education Case Management Training Manual**

**For Software Version 5.0**

**Tranquility Solutions, Inc.**



# ***Tranquility***<sup>®</sup>

## **Special Education Case Management Training Manual**

Published by Tranquility Solutions, Inc.  
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# 1. Training Agenda

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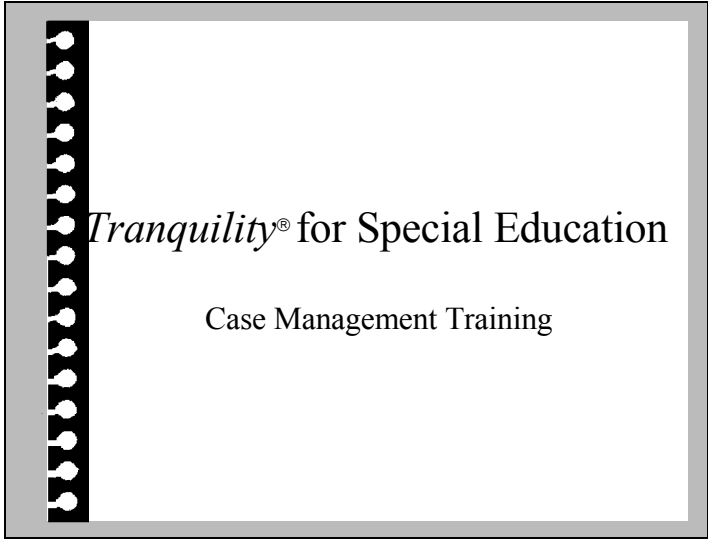
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## Trainee Agenda

1. **Tranquility Portfolios**
  - a) What is *Tranquility*?
  - b) How does *Tranquility* work?
  - c) What is a portfolio? questionnaire? document?
  - d) Why use *Tranquility* to generate documents/forms?
2. **Overview of the System**
  - a) Starting *Tranquility*
  - b) Electronic Filing System - Directory Structure
  - c) Creating a New Portfolio
  - d) Working in the Portfolio
    - i) Navigating through the Questionnaire
    - ii) Providing Answers
  - e) Previewing and Printing the Completed Document
  - f) Opening an Existing Portfolio
    - i) Modifying Answers to the Questionnaire
    - ii) Selecting Different Questionnaires
3. **Hands-On Experience - Chapters 4, 5 and 7 as needed**
  - a) Create a New Portfolio
    - i) Provide Answers to a Questionnaire
    - ii) Preview the Completed Document
  - b) Open an Existing Portfolio
    - i) Modify Answers to the Questionnaire
    - ii) Preview the Completed Document
    - iii) Selecting Different Questionnaire
4. **Questions and Discussion**
  - a) Review of Overall Process
  - b) "Quiz" over program
  - c) Evaluation of Training



## 2. PowerPoint Handouts



Notes:

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## ***Tranquility Case Management***

### ***Purpose of Workshop.....***

The purpose of this training is to develop your ability to use the *Tranquility Case Management* software so that you can easily and quickly create and maintain documentation (e.g., letters, IEPs, etc.) for special education.

**Notes:**

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## ***What is Tranquility?***

### ***Tranquility....***

- + Is a Microsoft windows-based document generation system
- + Interfaces with your compatible student information system (SIS)
- + Permits you to easily store and retrieve completed documents
- + Allows district to easily transfer and retrieve data across networks
- + Sequences you through the entire special education process from referral to exit

**Notes:**

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### ***Tranquility Case Management***

*Tranquility benefits you by....*

- \* Eliminating the need to complete a form by hand.
- \* Producing more complete, easier to read and fully documented reports.
- \* Eliminating the need to key duplicate information into your reporting program

**Notes:**

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### ***Tranquility Case Management***

*Tranquility benefits you by (continued)....*

- \* Allowing you to create multiple forms and documents from one set of questions and answers.
- \* Allowing you to make minor touch-ups and modifications using Microsoft Word.
- \* Saving you time

**Notes:**

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## Tranquility Case Management Training Overview

### Day One

- ✓ Program introduction and description
- ✓ Overview of the system
- ✓ Hands-on experience

### Day Two

- ✓ Share questions and experiences
- ✓ Review techniques
- ✓ Continue hands-on experience using an actual IEP
- ✓ Gain greater insight into program details

Notes:

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## Tranquility Case Management

### Specific Goals for Day One

- Learn the basic concepts (portfolio, questionnaire, document) of the case management program
- Learn the different types of questions you will see in your questionnaires
- Learn how to create and maintain portfolios
- Learn how to generate forms/documents
- Learn common user errors

Notes:

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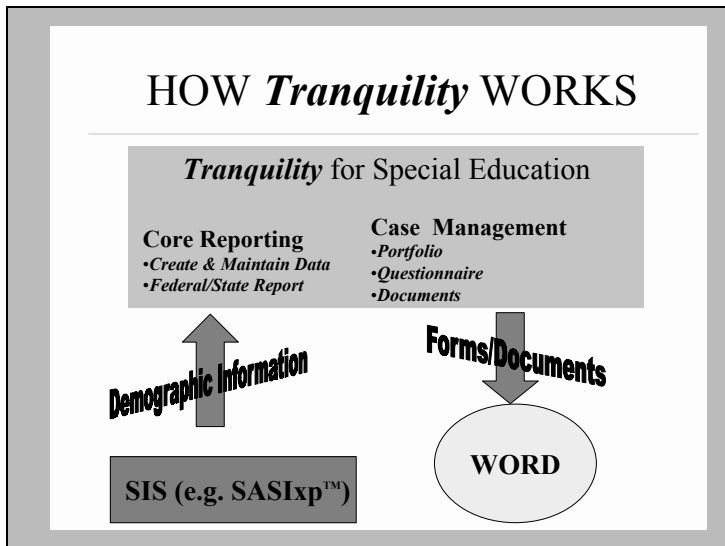
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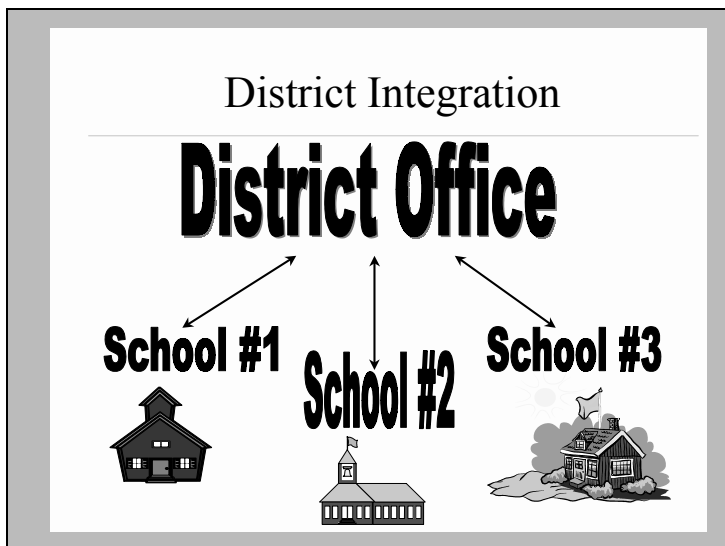
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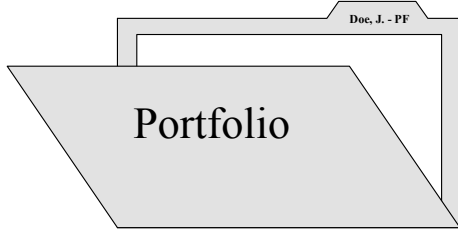
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## Tranquility Case Management

### ✓ What is a **PORTFOLIO**?

- Online version of your paper-based file folder
- Contains information about a student



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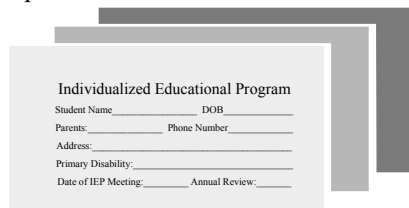


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## Tranquility Case Management

### ✓ What is a **QUESTIONNAIRE**?

- A series of questions answered by user
- Sequenced according to your forms and compliance laws



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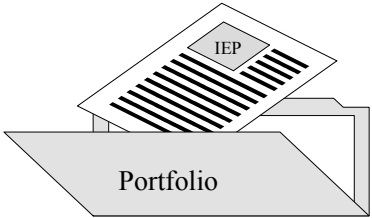


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**Tranquility Case Management**

**✓ What is a *DOCUMENT*?**

- Online form based on your paper-based form
  - Generated in Microsoft Word format
  - Creates an online historical paper trail



**Notes:**

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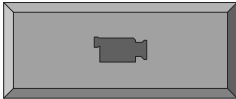
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**Overview of the System**

An overview demonstration of the Case Management front-end will now begin.  
(Agenda item 2)



**Notes:**

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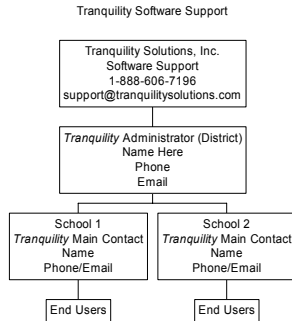
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## Support Questions

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**Notes:**

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*Special Education  
Case Management Training Manual*

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## 3. Describing Question and Answer Screens

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### Question Types

During the documentation processes of special education, you provide responses to questions in a variety of ways. Some of your responses are in the format of a date, narrative, list, etc. In *Tranquility* you will notice the same flexibility as you are prompted for information.

There are a variety of question types that may exist within any questionnaire in *Tranquility*. The five question types are:

- Date,
- Text (open-ended narrative),
- Multiple Choice (one selection allowed),
- List (multiple selections allowed), and
- Informational Only (no selections allowed), and
- External programs (screens which contain special/multiple functions).

A description and screen shot of each question type will follow in this chapter to assist you in becoming familiar with the different question types and how to respond to each.



## The Question and Answer Screen (Date, Text, Multiple Choice, and List)

**Note:** External questions are documented in the next section.

The question and answer screens for date, text, multiple choice and list questions are composed of three basic areas.

The screenshot displays the Tranquility software interface for a questionnaire. At the top is a menu bar with 'File', 'Edit', 'Maintenance', 'Options', and 'Help'. Below the menu bar is a title bar that reads 'Tranquility' and a window title bar that reads 'Questionnaire'. The main content area is divided into three sections: 'Question:', 'Answer:', and 'Navigational Buttons'. The 'Question:' section contains a text input field with the prompt 'Please enter your name.' and is labeled 'Question Area'. The 'Answer:' section contains a large text input field and is labeled 'Answer Area'. Below the answer field are buttons for 'Spell Check' and 'Attach...'. At the bottom, there are 'Question' and 'Person' tabs. The 'Question' tab has buttons for 'Next >', '< Previous', and 'Goto...'. The 'Person' tab has buttons for 'Next >', '< Previous', and 'Review...'. Below the tabs is a status bar showing 'Questionnaire: Sample Question Types' and 'Dawber, Kim'. An 'End' button is located at the bottom right.

### The Question Area

Located near the top of the screen, the question area is read-only. This area prompts the user for some specific information. In addition, a brief informational paragraph can be included to help guide the user to appropriately respond.

## The Answer Area

Located near the middle of the screen, the answer area allows the user to respond based on the question type. Following is an example of each:

**Answer:**



### Date

The “date” question type allows the user to enter a date in the MM/DD/YYYY format. The answer area is populated as the user enters the date.

### Text

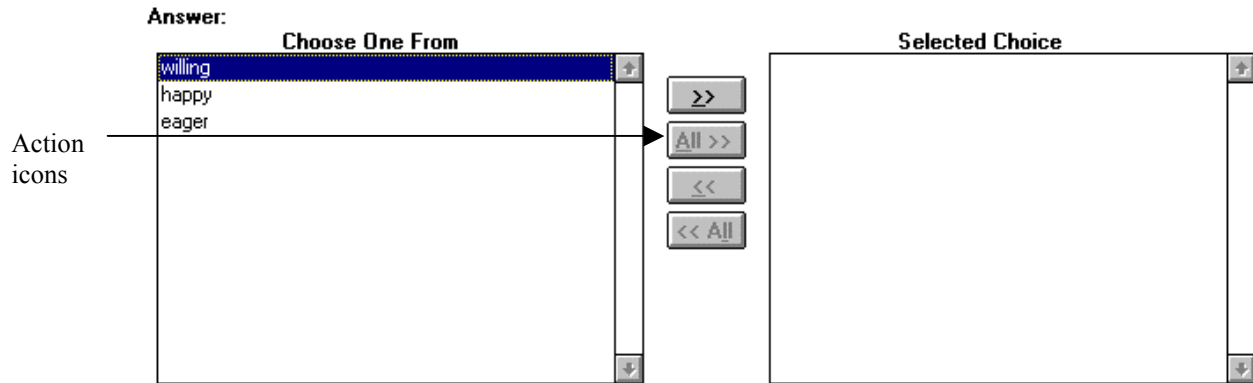
**Answer:**



The “text” question type allows the user to respond in an open-ended text format. In other words, the response is not limited to a few lines. The user can expand upon his/her answer as needed.



## Multiple Choice



The “multiple-choice” question type allows the user to select an answer from a predefined\* list of choices. Users are only allowed to select an answer that appears in the **Selected Choice** area when chosen.

You can select a choice by:

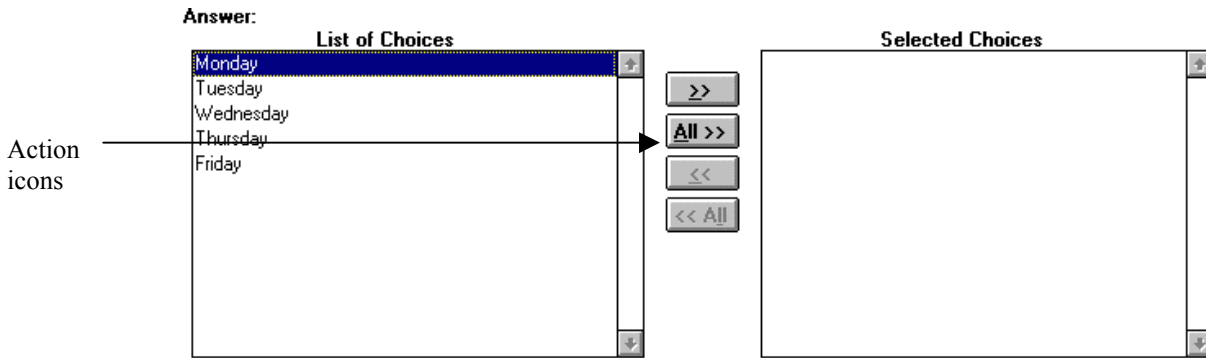
- Highlighting a choice and pressing **Enter**, or
- Double-clicking on a choice, or
- Clicking on the **action icons** between the **Choose One From** and **Selected Choice** boxes.

**Note:** The length of some options may exceed the width viewable on the screen. To see the entire option, simply highlight it and press F5. You will see the entire option displayed in the upper right-hand corner of the screen. Pressing any key will release the display.

---

\* The school district informs Tranquility Solutions of the desired picklist. Users are only “locked” into a set of answers if deemed appropriate by the district. An “Other” option allows for a user to provide information beyond the list of choices.

## List



The “list” question type allows the user to select multiple answers from a predefined\* list of choices. The answer(s) appear in the order chosen in the **Selected Choices** area. This order is also reflected in the generated documents.

You can select a choice by:

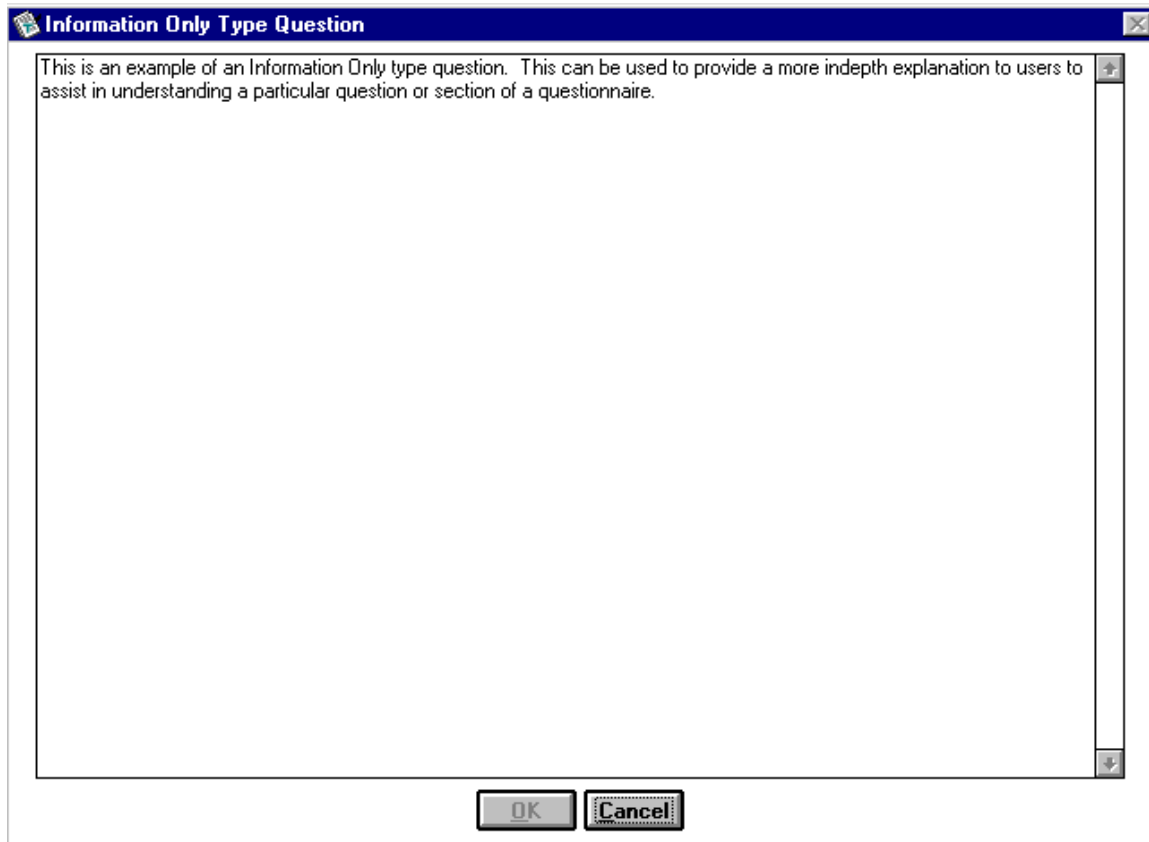
- Highlighting a choice and pressing **Enter**, or
- Double-clicking on a choice, or
- Clicking on the **action icons** between the **Choose One From** and **Selected Choice** boxes.

**Note:** The length of some options may exceed the width viewable on the screen. To see the entire option, simply highlight it and press F5. You will see the entire option displayed in the upper right-hand corner of the screen. Pressing any key will release the display.

\* The school district informs Tranquility Solutions of the desired picklist. Users are only “locked” into a set of answers if deemed appropriate by the district. An “Other” option allows for a user to provide information beyond the list of choices.

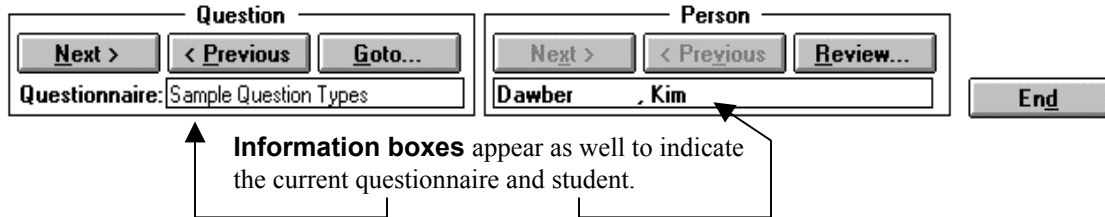


## Information Only



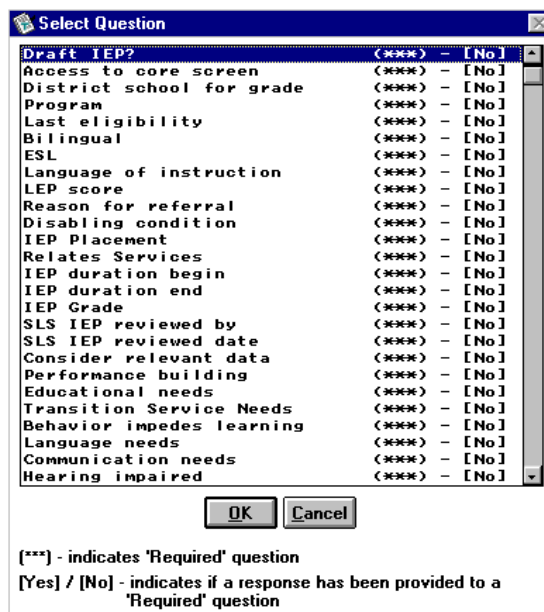
The "information only" question type allows the user to gain greater knowledge as to how the district wants him/her to respond to upcoming questions. In addition, it can be used for general reminders as well. This is a read-only screen and thus does not allow for any inputting of information from the user.

## The Navigational Buttons



## Question

- Next: Moves user to the next question in the questionnaire, one question at a time. The “next” question may be contingent on how you respond to the current question. In other words, if you have a Yes/No question, selecting “Yes” may take you to one question, while selecting “No” takes you to another. *Tranquility* eliminates the need for the user to be concerned with compliance from a sequencing of questions perspective.
- Previous: Moves user to the previous question in the questionnaire, one question at a time.
- Goto: Allows user to randomly select which question to jump to in the questionnaire. The Goto list is comprised of unindented questions. Unindented question (e.g., Does this student need an ITP?) may have a series of indented questions contingent on your response. These indented questions do not appear on the Goto list. The following is a sample screen shot of a Goto list of questions with an explanation of each column.



- Questions: The first column displays the list of questions that you may jump to.
- Required Questions: The second column (asterisks) indicates if the question is ‘required.’ *Tranquility* informs you which required questions you did not respond to during the Generate process, but does not force you to provide an answer. Forcing you to answer questions would prevent you from creating a draft IEP.
- Yes/No Indicator: The third column indicates if a response is present for the question. This visual indication allows the user to quickly review if any ‘required’ questions have not been answered. Keep in mind that indented questions are not displayed and may not have been answered.



- End: Terminates the question and answer interactive session for this questionnaire. Please note that answers are saved\*\* when you move from one question to the next.

### **Person**

- Next: This feature is not available in *Tranquility for Special Education*.
- Previous: This feature is not available in *Tranquility for Special Education*.
- Review: Provides a read-only view of basic demographics for a student.

---

\*\* External program questions require a **Save** on the screen. You will notice a Save button for this function. All other questions perform an auto-save upon leaving the screen.

## The Question and Answer Screen (External Program Questions)

The external program questions, which are more comprehensive in their functions, access the core reporting screens.

Sample Core Reporting Screen

**Ellipsis lookup buttons – Access lookup codes and descriptions to assist in data entry.**

**Demographic Information**

**Data Entry Fields**

**Student Placement Information**

Student ID #: 001 SS#: 123-45-6789 Grade: 06 Gender: Male  
 Name - Last, F/M: Student Sample Middle Date of Birth: 12/01/1990  
 Enrollment School: 002: Sample High School Home School: 001: Sample School

HOURS PER WEEK IN: General Ed - 11.00 Special Ed - 19.00 % Mainstreamed: 37  
 MINUTES PER WEEK IN: General Ed - 0 Special Ed - 0 % Special Ed: 63

Disability ID	Disability Rank	School Number	Beg Date	End Date
03	SEC: Secondary	001	10/03/2001	/ /

Disability ID #: 03 Mentally Disabled/Profound Effective Date-Begin: 10/03/2001  
 Disability Rank: SEC Secondary Effective Date-End: / /  
 Teacher of Record: 9999 UNDEFINED Hours per Week: 0.00  
 Teacher of Service: Minutes per Week: 0  
 School ID #: 001 Sample School Cost: 0.00  
 Placement Status: A Active Fed Pgm:  
 Progress:  
 Placement Type:  
 Termination Reason:  
 In/Out of Dist. Serv:  
 Least Restrict Env: 27 Itinerant Service Outside the Home  
 Duration/Frequency: 0.00 /  
 Location:  
 Funded By:  
 Source:

Reason...  
 Comments...  
 Spec Needs...  
 Include in CM

The core reporting screens are consistent in functionality and layout but differ in content as reporting and goals and objectives screens as appropriate.



* Obj. ID:	Description:	* Criteria for Mastery	* Evaluation Method:
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

### Sample Goals & Objectives Screen:

**Note:** When providing information for the Goals & Objectives screen, **do not use double quotes** (“”). Doing so will not effect the saving of your data, but may result in partial display of the data upon generating a document.

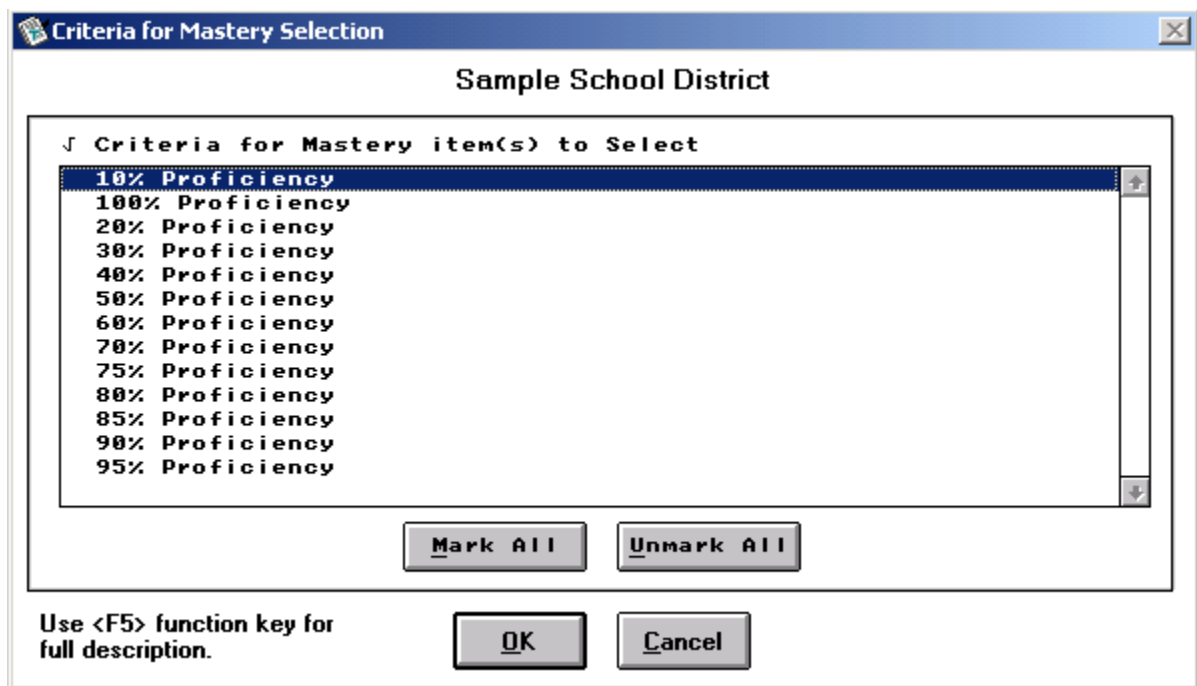
The length of some objectives may exceed the width viewable on the screen. To see the entire objective, simply highlight it and press F5. You will see the entire objective displayed in the upper right-hand corner of the screen. Pressing any key will release the display.

## Multi-Select Functionality for Goals and Objectives Screen

The multi-select functionality is available to all appropriate lookup tables associated with the Goals and Objectives screen. This will allow users to more efficiently populate the Goals and Objectives screen.

**Note:** Certain tables are still single select. For example, *Tranquility's* Goals and Objectives page is designed to document one goal and all of the supporting data for that goal. Therefore, a user is able to select only one goal from the lookup table. Additionally, if your state has other fields where business rules indicate that only one selection is allowed, then *Tranquility* has maintained those lookups as single selection as well. If your district feels any of your tables should be multi-select that are not, please contact Tranquility Solutions' Support.

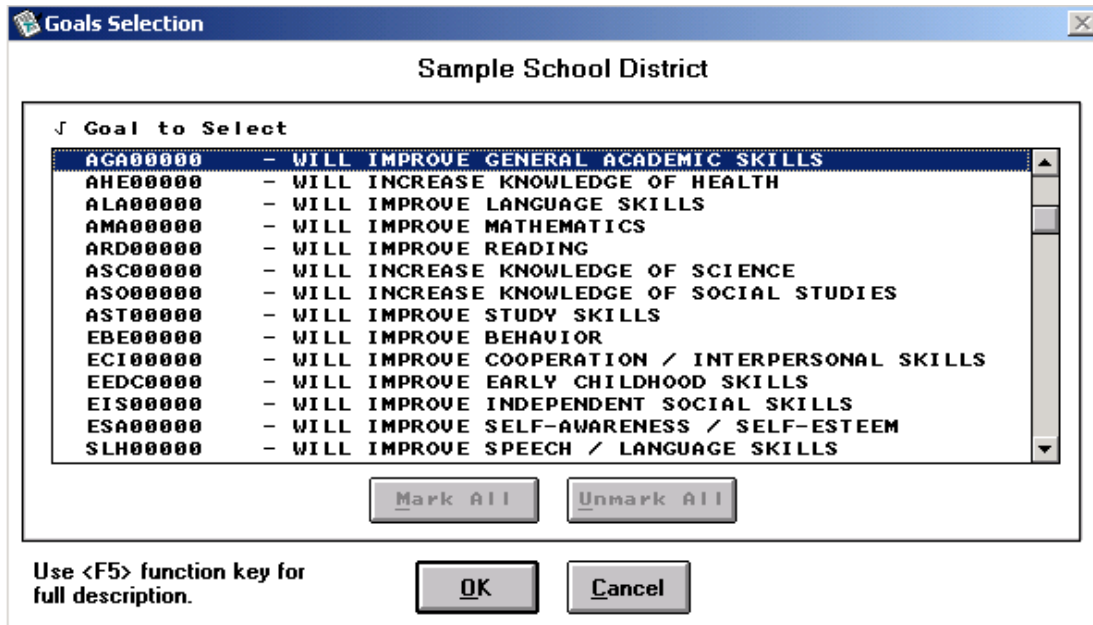
The lookup window title bar now displays the corresponding table name as displayed on the **Maintenance-Special Ed. Tables** menu. This assists those staff members responsible for maintaining the lookup lists for the entire district.



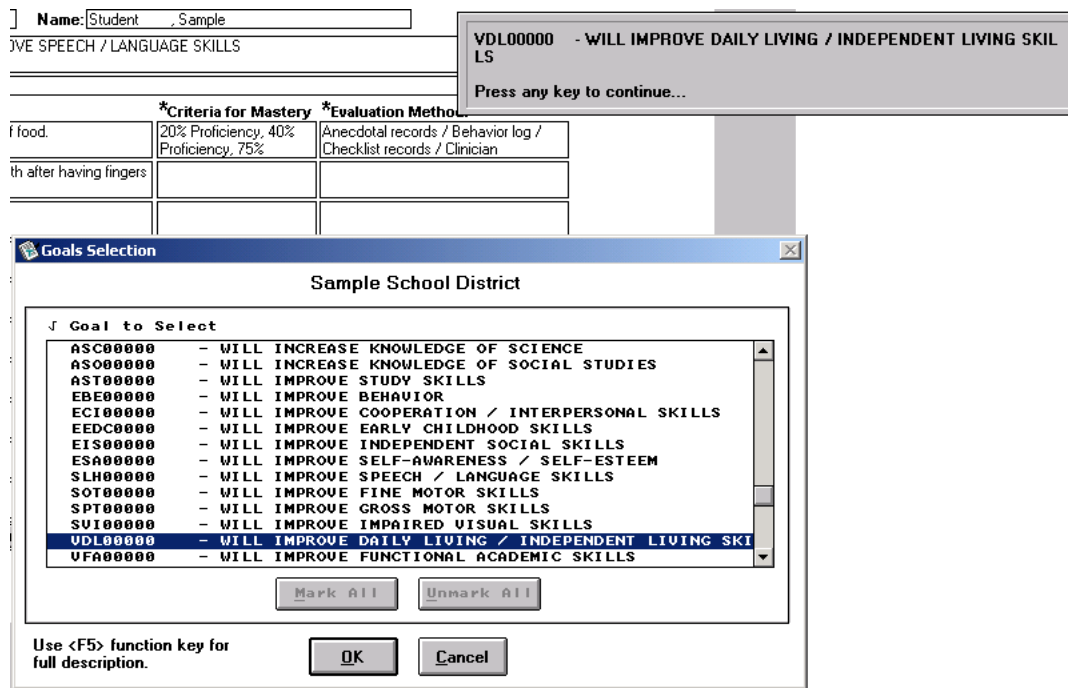


## Selecting Goals

1. To select a goal, you still press **F5** within the Goal ID field. Now, the following window appears:



2. To see a full description of a goal highlight the goal and press **F5**. Pressing F5 will display the entire description in a pop-up window in the upper-right-hand corner of your screen. Touching any key will release the pop-up window.



3. Although the screen appears to allow multi-select of goals, notice that the **Mark All** and **Unmark All** buttons are not activated. This indicates the goal selection is a single select function. To select a goal, use one of the following methods:
  - a. Double click on the goal.
  - b. Highlight the goal and press **Enter**.

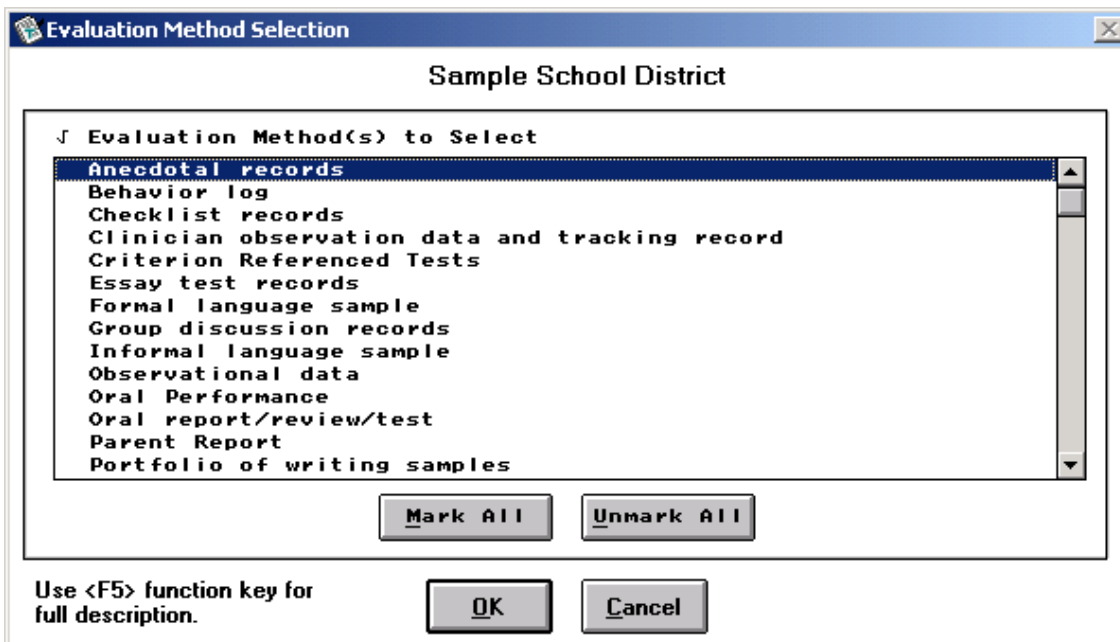


## Selecting Additional Goal and Objective Fields (except Objectives)

The ability to multi-select objectives has been a favorite of Case Management users. Therefore, Tranquility Solutions has expanded this concept to additional lookup lists on the screen. The selection of objectives remains as it was in Version 4.5.

An example of this expanded functionality is below, using the **Evaluation Methods** lookup list.

1. With your cursor placed inside the desired lookup field, press **F5**. The following window appears:



2. To select a record or item from the list,
  - a. Double click on the item
  - b. Highlight the item and press **Enter**.
3. You may use the **F5** key to pop-up the entire description of an item as described above in the Goals selection area.
4. Once an item has been selected, you will see a checkmark (✓) appear to the left of the item. To deselect an item, simply double click on it again or highlight it and press **Enter**. Using the **Mark All** button will select all of the items while using the **Unmark All** will deselect all items.
5. Once you have the items selected you want, press **OK** to return to the main Goals and Objectives screen.

## Including Records in Case Management Document Generation

**Note:** If your district does not utilize **any** Core Reporting screens in your questionnaires, this section does not apply. Furthermore, your district should configure the System Setup Options to suppress the warning messages associated to this field.

If your district does not use Core Reporting screens within your Case Management questionnaires, you may leave this field unchecked. If your district does include Core Reporting screens within your questionnaires, you should read the remainder of this section.

A user (Case Management or Core Reporting) can ensure a particular record is included in document generation by placing a checkmark in the **Include in CM** field, regardless of the data (status, end date, etc.). Note that the location of the field varies from screen to screen.

Upon saving the record, a checkmark will appear in the list box, indicating the record has been marked for inclusion during document generation.

**Important Note:** If Case Management users access a Core Reporting screen in a questionnaire, each record on each Core Reporting screen that should be included in the generated output must be edited and have a checkmark entered in this field.

**Student Referral Information**

Student ID #: 001  
 Name - Last: Student  
 First/Middle: Sample  
 Social Security #: 123-45-6789  
 Date of Birth: 01/01/1990  
 Gender: Male

Referral Status	Suspected Disab.	Referral Date	End Date
JA : Active	01	01/01/2001	/ /

Referral Date: 01/01/2001  
 Case Conference Date: //  
 Psychologist Eval. Date: //  
 Notice Received: //  
 Notice Sent: //  
 No Later Than Date: //  
 Parent Conference Date: //  
 Permanent Placement: //  
 Vocational Signature: //  
 Destroy Records Date: //  
 Ending Effective Date: //  
 3 Year Review Date: //  
 Annual Case Review: //

Filed Date: //  
 Submitted: //  
 Test Date: //  
 Typed Date: //  
 Services: ...  
 Vocational Education Signature Received: ...  
 Suspected Disab: 01  
 Referral Type: A  
 Status: Active  
 Psych ID #: ...  
 Case Manager: ...  
 Source: ...  
 Sending Agent: ...

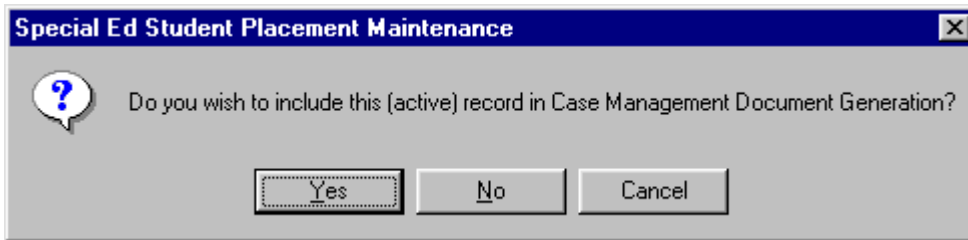
Spec Needs...  
 Reason...  
 Mentally Disabled/Educable  
 Include in CM

Include in CM Field



If your district wants to prompt you to check the Include in CM field for active records only upon a save, the following are messages that you may see.

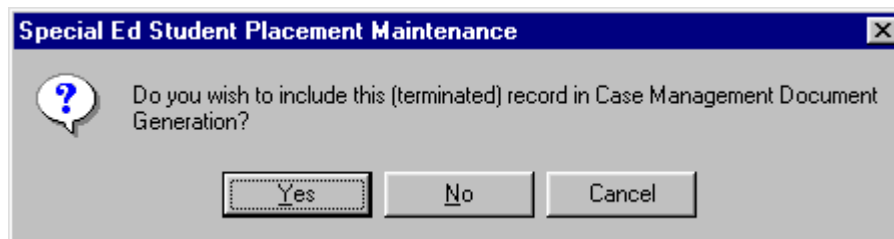
### Warning 1



This warning appears upon a Save if the **Include in CM** option is unchecked and the record is active (i.e., there is not an ending or terminating date within the record).

It is generally assumed that an active record would be included on current documentation. The user however can make the determination as to whether or not the record is to be included.

### Warning 2



This warning appears upon a Save if the **Include in CM** option is checked and the record is inactive (i.e., there is an ending or terminating date within the record).

It is generally assumed that an inactive or terminated record would not be included on current documentation. The user however can make the determination as to whether or not the record is to be included.

## Multi-section Screens

*Tranquility* has several Core Reporting screens that contain two data entry areas within the screen. The Assessment screen is an example of this type of screen as it has two sections, a header and detail, where most screens have simply one section. The data entry in the header area is accessible when the user presses **Add** on the toolbar. The data entry in the detail area is accessible when the user presses the **Add** on the screen itself, which is towards the bottom right of the screen. You may have other screens within your district, which work in a similar manner.

The screenshot shows the 'Student Assessment Information' window. At the top, there is a menu bar with 'File', 'Edit', 'Record', 'Students', 'Staff', 'Tables', 'Output', 'Options', 'Window', 'Help', and 'Supervisor'. Below the menu is a toolbar with buttons for 'Add', 'Edit', 'Print', 'List', 'Close', and navigation arrows. The main area is divided into two sections:

- Assessments/Tests:** This section contains a table with the following data:
 

Level	SNA-SWA-NSWM	Begin Date	End Date
1008: TerraNova		02/02/2002	

 An arrow labeled 'Header Data' points to this table.
- Accommodations and Modifications:** This section contains a table with the following data:
 

Code	Description
SCH03	Administer in afternoon rather than morning or vice-versa

 An arrow labeled 'Detail Data' points to this table.

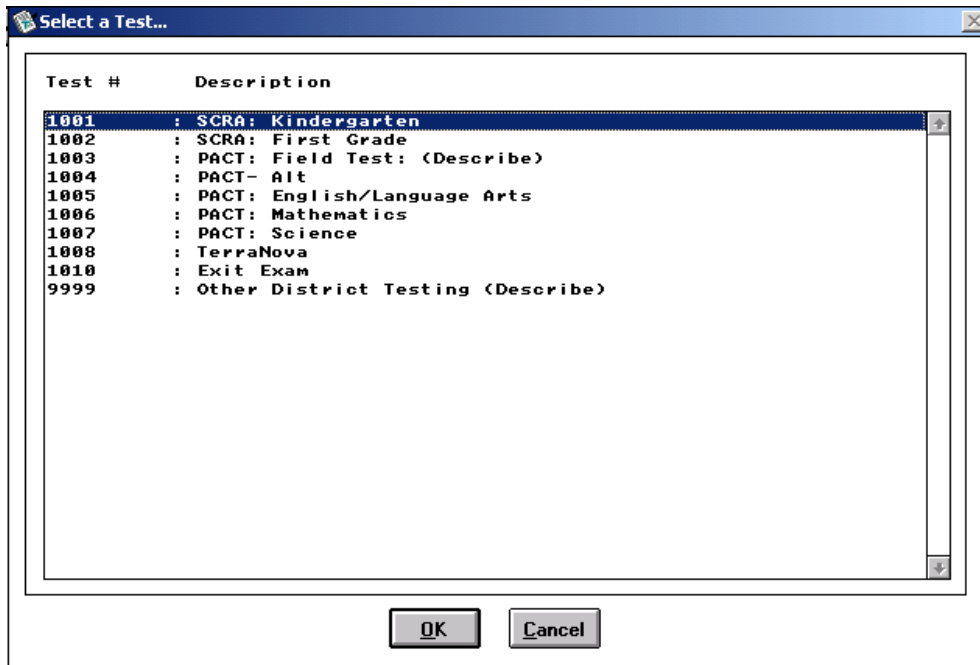
In addition to having the two sections as noted above, these screens may allow for the user to define **other** data depending on the selections they make. The district configures various system parameters that determine which records may be further defined.



## Assessment Screen -- Other Tests

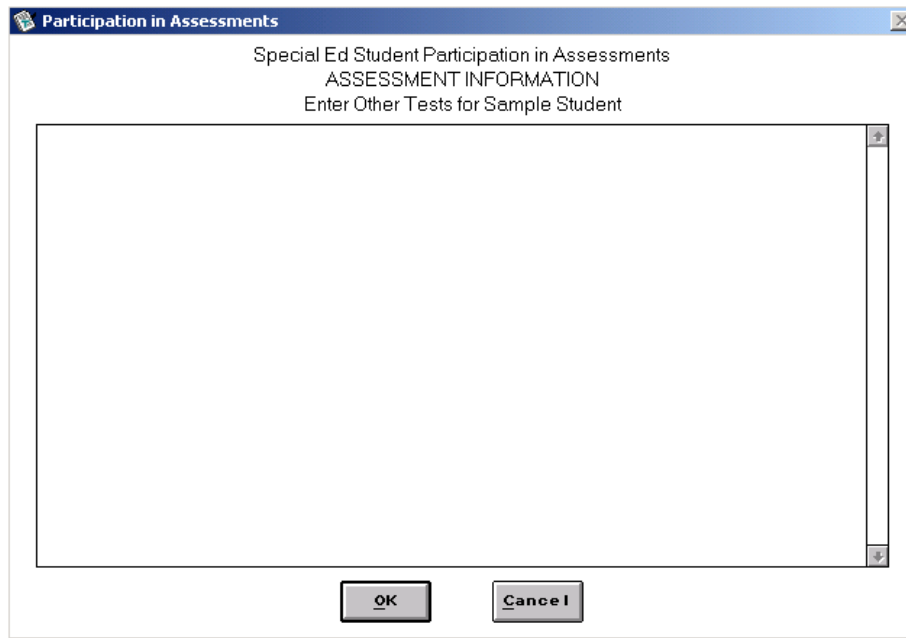
This memo field allows you to enter a test name that is not defined in your lookup table of tests. As a general practice, the district should define all possible tests in the lookup, but exceptions may always arise. Therefore, your district should include a test code and description, such as **9999 Other ...** in the **Tests Lookup** table. Then, via configuration of the System Setup Options screen, your *Tranquility* Administrator will select this other test code to allow you to further define the test.

1. Press **Add** (or **Edit** to modify an existing test). The following window appears:



2. Locate the test record that is to be used to define an “other” test, highlight it and press **OK**. In the sample screen above this would be record **9999**.
3. If you selected the appropriate record and the system is configured correctly, you will now have access to the **Other Tests** memo field. Otherwise the field remains inactive (grayed out).

4. Press the **Other Tests** button. The following window appears:



5. Enter the Other Test information as appropriate.
6. Press **OK**. Note that a checkmark appears on the **Other Tests** button, which is similar to other memo fields in *Tranquility*.

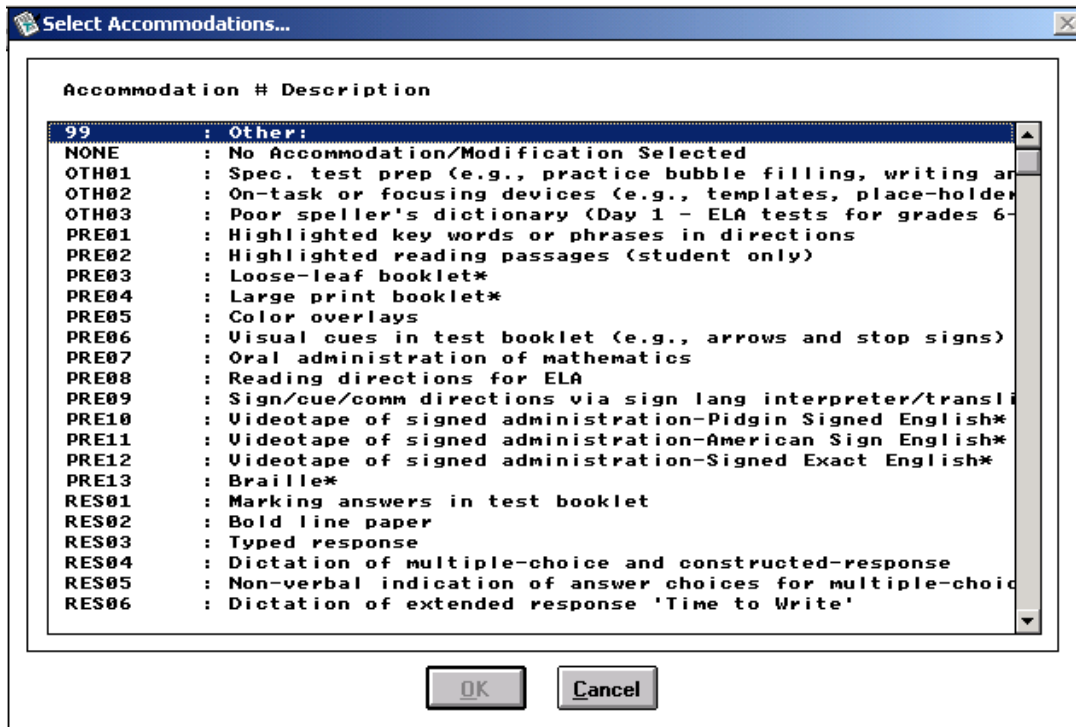


## Assessment Screen -- Other Accommodations and Modifications

Similar to the Other Tests above, you can now define “other” accommodations and modifications. The district will need to ensure that proper configuration exists, including an “other” accommodation/modification code. In addition to this new feature, the district can also configure existing accommodation/modification records to allow for further description.

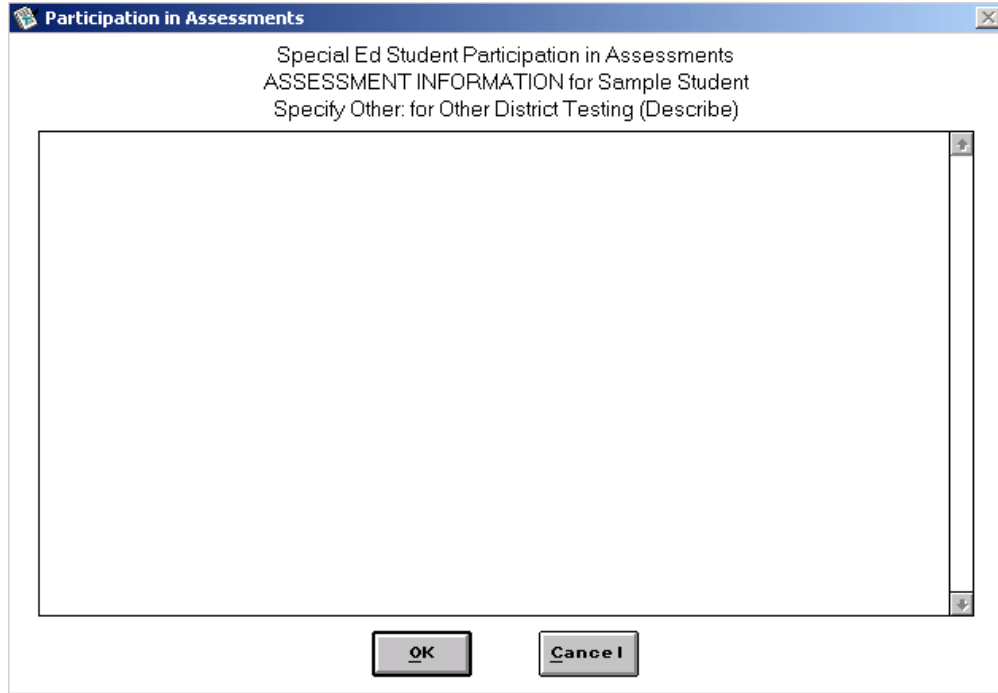
For example, let’s say that you have an accommodation of “Allow use of calculator”. However the student may not use a graphing calculator. Therefore you need the ability to further define the accommodation to note this information. To visually determine which accommodation/modification records permit additional information, look for a consistent character at the end of each record such as a colon (:). If you cannot determine this, contact your *Tranquility* Administrator.

1. Ensure you are adding or editing an assessment record.
2. In the **Accommodations and Modifications** area of the screen, press **Add**. The following window appears:



3. Select the “other” record and/or records that permit additional information.
4. Press **OK**.
5. Press **Save**.

6. Note that each accommodation/modification record that you select which is configured to allow for additional information will result in the **Other** field being active or **bold**.
7. To enter additional information on a specific record, highlight the record and press **Edit** (in the lower portion of screen).
8. Press **Other**. The following window appears:



9. Enter the other information.
10. Press **OK**. Note that a checkmark appears on the **Other** button, which is similar to other memo fields in *Tranquility*.



### Completed Assessments Sample Screen

**Student Assessment Information**

Student ID #: S633143083      Grade: 07      Social Security #: 633-14-3083  
Name - Last: Student      Date of Birth: 11/27/1989  
First/Middle: Any      Gender: Female

Test Number: 1014      ITBS: Reading  
Alt. Assessmt: N  
Level: 7       Portfolio       Standard-No Accommodations  
Begin Date: 07/14/2003       IEP Objectives       Standard-With Accommodations  
End Date: / /       Off Level       Non-Standard-With Modifications       Include in CM

Assessments/Tests

Assessment/Tests	Level	SNA-SWA-NSWM	Begin Date	End Date
J1002: CRCT Criterion-Ref Competency	7	J	07/14/2003	/ /
J1014: ITBS: Reading	7	J	07/14/2003	/ /

Accommodations and Modifications \* Includes 'Other' Information

PRE07	Magnification device
*PRE09	Others: (be specific)
SET01	Small group testing

Code: PRE09      Others: (be specific)      Other...









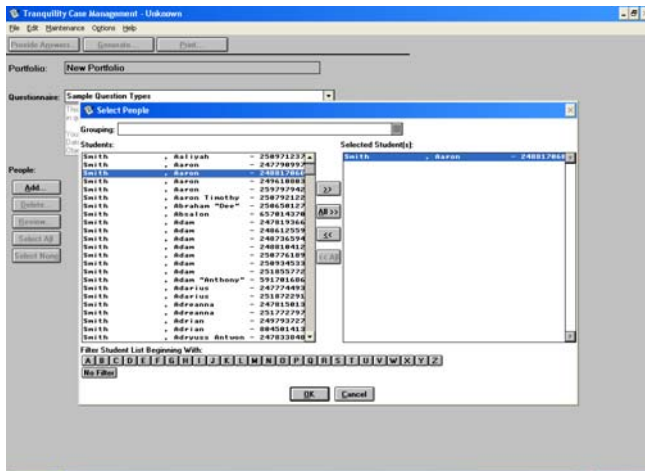




5. Select the name of the student for whom you are creating the portfolio by highlighting their name and pressing the **ENTER** key. You can filter the list of students based on the first character of the student's last name. Press any letter to redisplay the list of students. This assists users that may create a portfolio at the district level.



**If you do not see a student name on the right side of the screen, you have not selected a student yet.**



Notice that the student you selected now appears in the right hand box on the screen.





















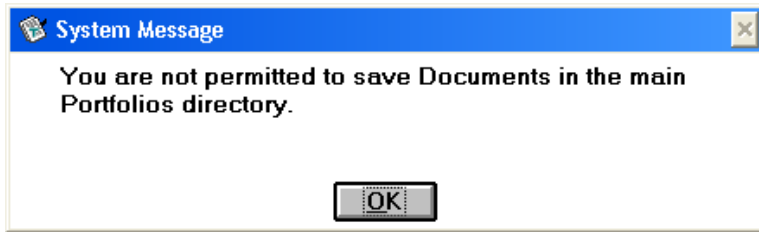




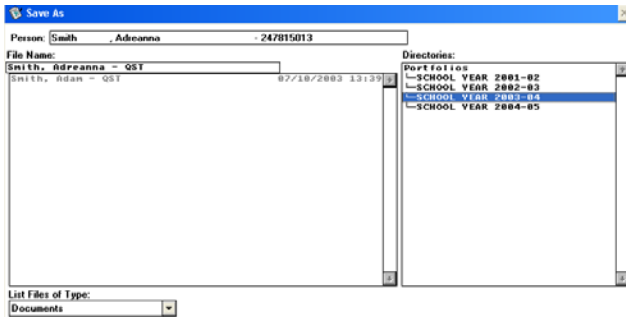




If you choose to save the document in the root directory (e.g., **Portfolios**), you will see the following message:



Click **OK**. You will be brought back to the Directory Manager where you may choose the correct school year.



## Notes

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13. To close *Tranquility*, select **F**ile then **E**xit from the menu bar.



**Notes**

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Each time you update a student's portfolio, the Date/Time stamp is updated in the File-Open window



## 5. Training Activities

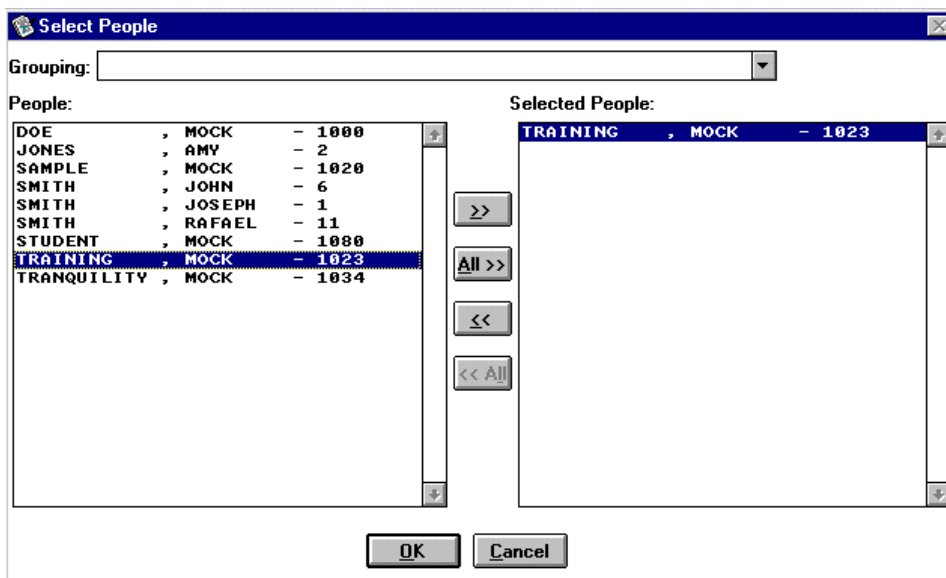
### Activity 1

*Goal:* Create a New Portfolio

*Purpose:* Every student in Tranquility should have his/her own portfolio. A portfolio needs to be created once per student as it can “follow” the student until he/she exits special education.

1. From the **File** menu, select **New**.
2. Highlight the desired questionnaire and click **OK**.
3. Select the name of the student for whom you are creating the portfolio by highlighting their name and pressing the **ENTER** key. You will notice that the student you selected now appears in the right hand box on the screen (*Figure 1.1*).
4. Click **OK**.
5. Highlight the directory in which you wish to save the portfolio (e.g., **Portfolios**).
6. Click **OK**.

*Figure 1.1*



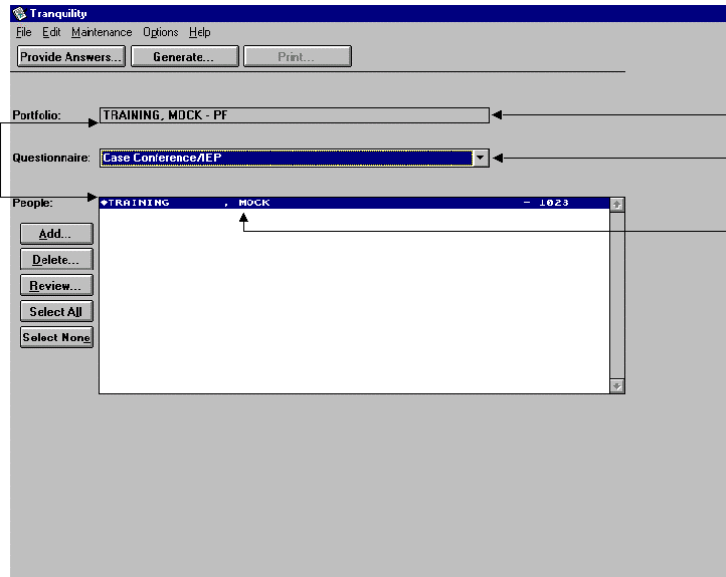
Notice that the student you selected now appears in the right hand box on the screen.



If you were successful your screen should look like Figure 1.2.

Figure 1.2

**Hint:** Name should be the same and should not have more than one student name in the people box



Student Name – PF

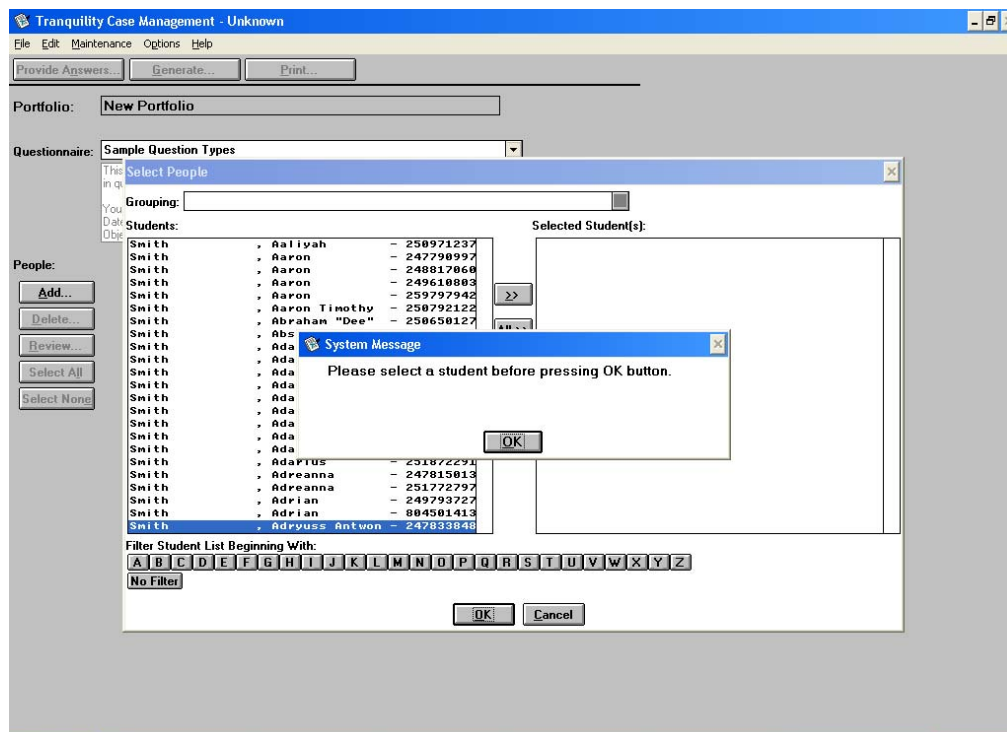
Questionnaire

Students' Names associated with this portfolio appear here. If additional names are in the "People" box, it is strongly suggested you contact your *Tranquility* Administrator to verify your business processes.

## If you were unsuccessful... (See Figure 1.3)

- You will see the following Message (Figure 1.3)
- Click OK. Then highlight and Double Click the selected student to the right hand side of the box. You can then proceed to create the Portfolio in the Portfolios directory.

Figure 1.3



- Once you have successfully created a portfolio, select **Close** from the **File** menu.

I have successfully completed this activity.



## Activity 2

*Goal: Open an Existing Portfolio*

*Purpose: Once a portfolio has been created for a student in Tranquility you will update it with information. This simply requires opening the portfolio.*

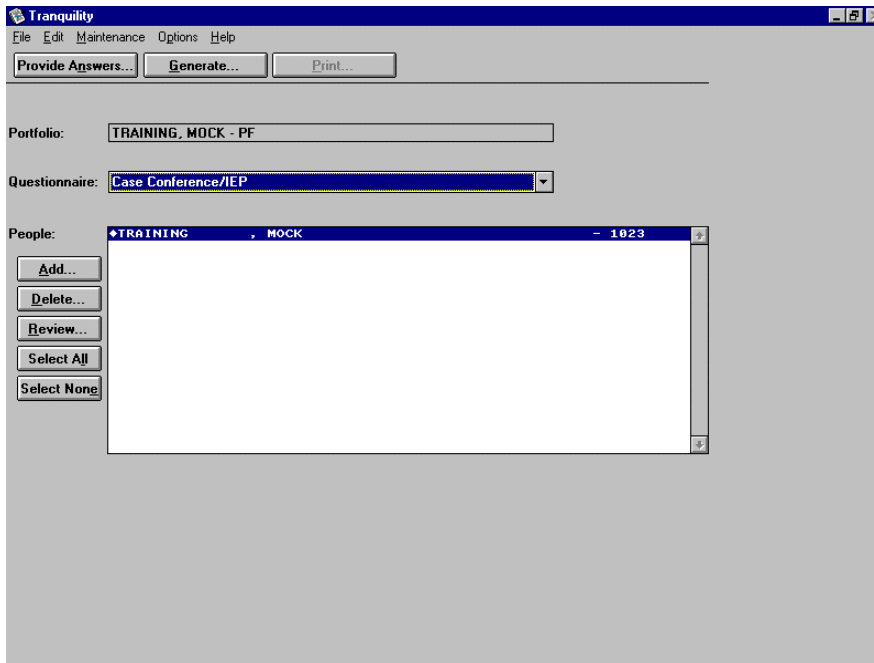
1. From the **File** menu, select **Open**.
2. Highlight the name of the student portfolio that you want to open.

**Note:** If you do not see the name of the desired portfolio, you may want to check the subdirectories (e.g., 2003/2004 Documents) to ensure that it has not been previously created and saved in a non-root directory.

3. Click **OK**.

**If you were successful your screen should look like Figure 2.1.**

*Figure 2.1*



I have successfully completed this activity.

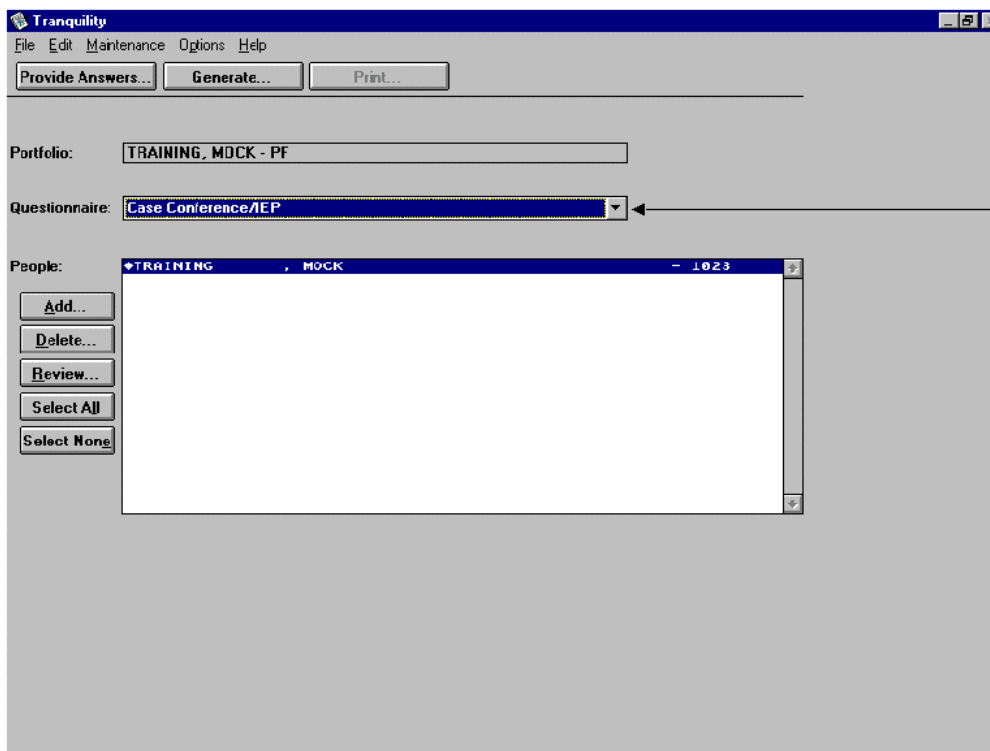
## Activity 3

*Goal:* Select a Different Questionnaire

*Purpose:* Once a portfolio has been created for a student in Tranquility you can provide answers for any questionnaire that has been created for your district. If a questionnaire has been created but you do not see it in the list of available questionnaires, you may have been restricted via security.

**Note:** A portfolio must be open before you can select a different **Questionnaire**. See Activity 2 for more information.

1. Click on the **Questionnaire** drop-down menu.



This is the **Questionnaire** drop-down menu.

Your district may only have one questionnaire.



2. Click on the name of the **Questionnaire** that you want to use.

<b>Questionnaire:</b>	<b>Authorization For Release of Information</b>	Questionnaire drop-down menu expanded.
	<b>Authorization For Release of Information</b>	
	<b>Case Conference/Annual Review Notification Letter</b>	
	<b>Case Conference/IEP</b>	
	<b>Causal Relationship Determination/ Case Conf Rep</b>	
	<b>Communication Disorder CCR</b>	
	<b>Demographic Information Questionnaire</b>	
<b>Enrollment/Withdrawal Form</b>		

The newly selected questionnaire now appears in the **Questionnaire** field.

I have successfully completed this activity.

## Activity 4

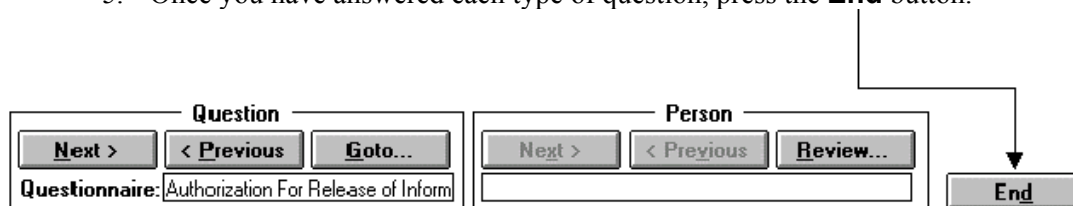
*Goal: Provide Answers – Input Data*

*Purpose: Once a portfolio has been created for a student in Tranquility you will input information by responding to questionnaires. This is where a majority of your time will be spent.*

**Note:** A portfolio must be open before you can **Provide Answers**. See Activity 2 for more information.

In addition, please select the **Questionnaire** that represents the IEP for your district. See Activity 3 for more information.

1. Press the **Provide Answers** button located in the top left of your screen.
2. You will see the first question for the questionnaire. Please see the training handouts that describe the different question types for more information.
3. Experiment with the **Navigation Buttons** and the associated keyboard shortcuts (F5, F7, F8 and F9).
4. Answer one question of each type (date, text, multiple choice, list choice, and external programs). As for the external program questions, please experiment with both **core reporting screens** and **goals and objectives**.
5. Once you have answered each type of question, press the **End** button.



I have successfully completed this activity.



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## Activity 5

*Goal: Generate a Document*

*Purpose: Once a portfolio has been created for a student in Tranquility and you have provided answers, either partially or completely, you will want to preview and perhaps print a document. The documents are based on the format of your paper forms as appropriate.*

**Note:** A portfolio must be open before you can **Generate** a document. See Activity 2 for more information.

In addition, you may want to **Provide Answers** prior to generating a document. The process does not change only the output, as it is dependent on your responses. See Activity 4 for more information.

1. Press the **Generate** button located in the top left of your screen.
2. Select a document to generate.
3. Press **OK**.
4. Select a subdirectory to save the document. Verify that you are saving the document in a recommended subdirectory.

**Hint:** If you press **OK** after selecting a subdirectory to save the document in and you receive a system message warning of your action, you have not selected a recommended subdirectory.

**Note:** After you select a subdirectory to save the document you just wait until the completed document appears on your screen. This is your signal that processing is complete. If you have activated other applications during processing, you may need to click on Microsoft Word on your taskbar.

5. Preview the completed document in Word. Upon completion of preview (and printing if desired), choose **Close** from the **File** menu.
6. Return to *Tranquility* by clicking on the *Tranquility* icon on the taskbar.

7. From the **File** menu, choose **Close**. You should now be at the main *Tranquility* program screen (See *Figure 5.1*).

*Figure 5.1*



I have successfully completed this activity.



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## Activity 6

*Goal: Open Previously Generated Documents*

*Purpose: Once a document has been generated, it may become necessary for other users to view the document. Subsequent teachers, Special Education Administrators, principals, etc. may, at different times during the school year need to read, review a student's documentation.*

**Note:** A document must be generated prior to attempting to open the document. See Activity 5 for more information.

1. From the **File** menu, select **Open**.
2. Highlight the name of the student whose document you want to open.
3. In the lower left hand corner of the screen, change the **Directory** selected from **Portfolios** to **Documents**.
4. Click the subdirectory in which the document was saved.
5. Find the document name you are trying to open.
6. Highlight the document name and press **OK**.
7. The document selected will open in Word.
8. Upon completion of viewing the document, choose Close from the File Menu in Word.
9. Upon completion of viewing (and printing if desired) of the document, choose Close from the File Menu on the *Tranquility* taskbar.

I have successfully completed this activity.

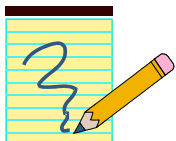
## Activity 7

*Goal: Repeat Previous Activities Successfully*

*Purpose: To successfully learn new tasks, repetition is vital. Challenge yourself to repeat the activities for additional students referring to handouts and notes as little as possible.*

- Think of the different scenarios that you are faced with currently as you complete your required case management documentation. Attempt to create these same scenarios as you use the program.
- Ask your trainer for helpful hints in how to navigate through the program quicker. Both hands on the keyboard are faster than one on the mouse.

I have successfully completed this activity.

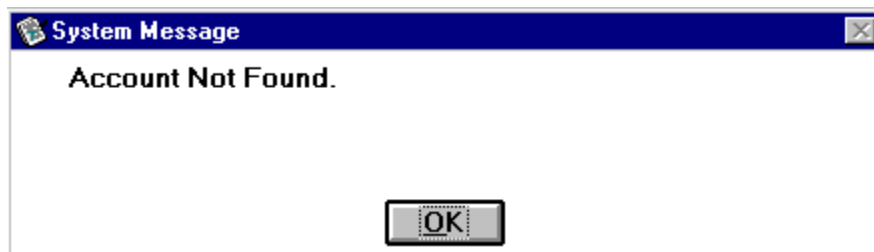




## 6. Common System Messages

This chapter provides you with a sample of common user or configuration system messages or errors that you may encounter as you train or use the Tranquility Case Management software. The sequence is the order in which they commonly occur. With the exception of the Stop Sign Error Message, the following are a result of incorrect system configuration or user error.

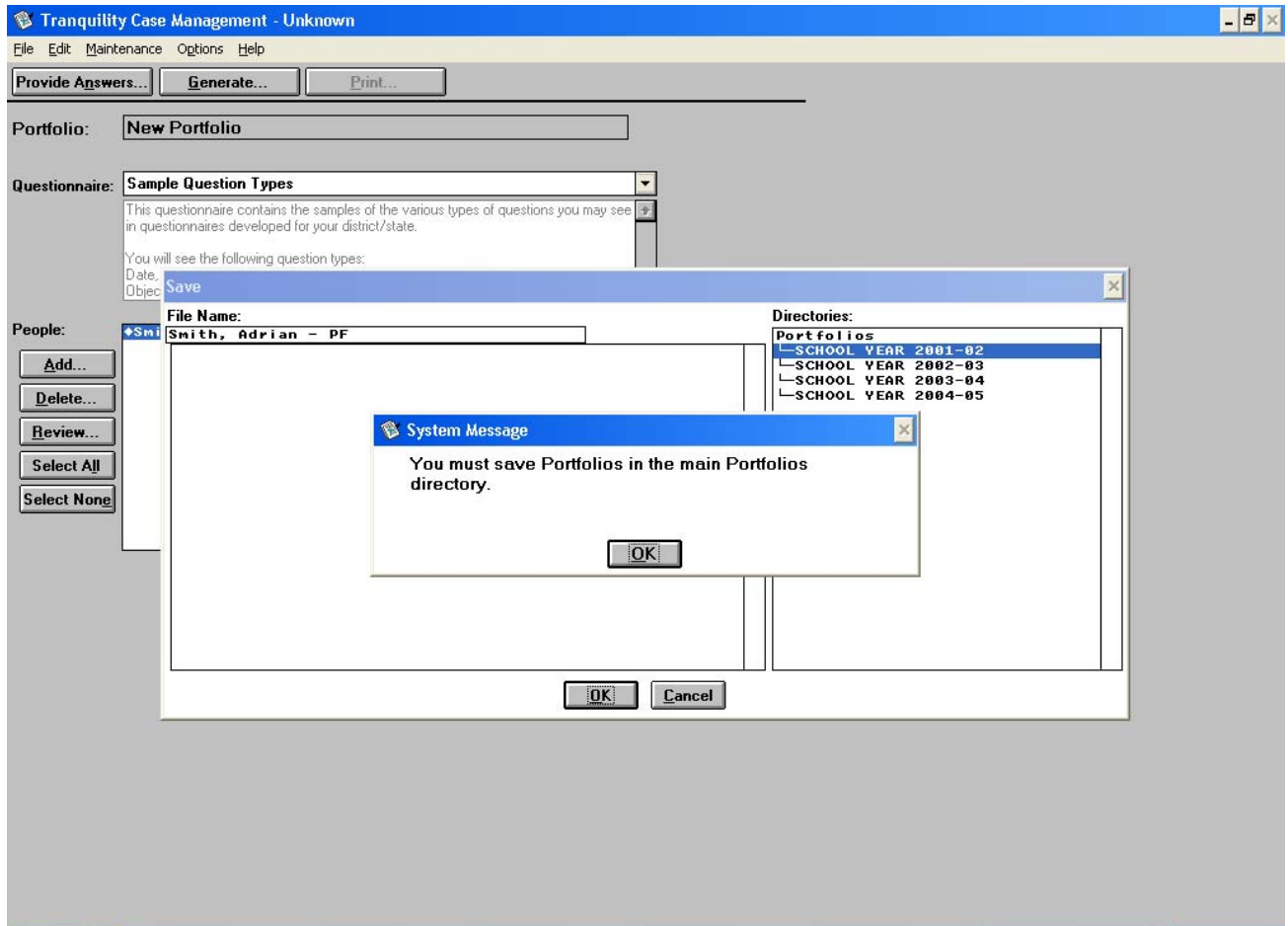
### Account Not Found or Password Not Found





Commonly Occurs During	Cause(s)	Solution(s)
Log in	<ol style="list-style-type: none"><li>1. User is clicking (with mouse) in the Account/Password cell and is not left justified prior to entering information</li><li>2. User does not exist in system.</li></ol>	<ol style="list-style-type: none"><li>1. Encourage user to not click with mouse after double clicking on icon. The program will default to location where user can start typing in account.  -or- Press <b>Home</b> after clicking in the account/password cell, before entering account/password.</li><li>2. Create the user an account.</li></ol>

## Trying to Save a Portfolio

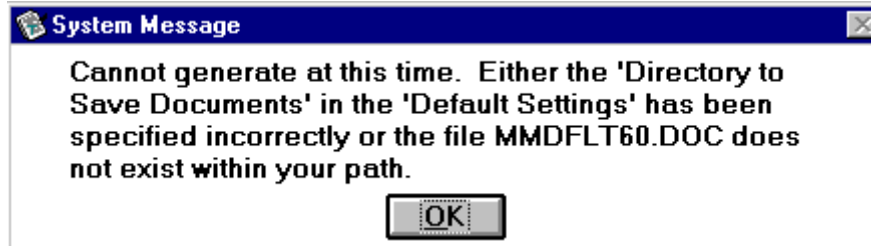


Commonly Occurs During	Cause(s)	Solution(s)
File New process	1. User selected a directory to save the portfolio other than the <b>Portfolios</b> main directory.	1. Press <b>OK</b> and click on the <b>Portfolios</b> directory. Then press <b>OK</b> .



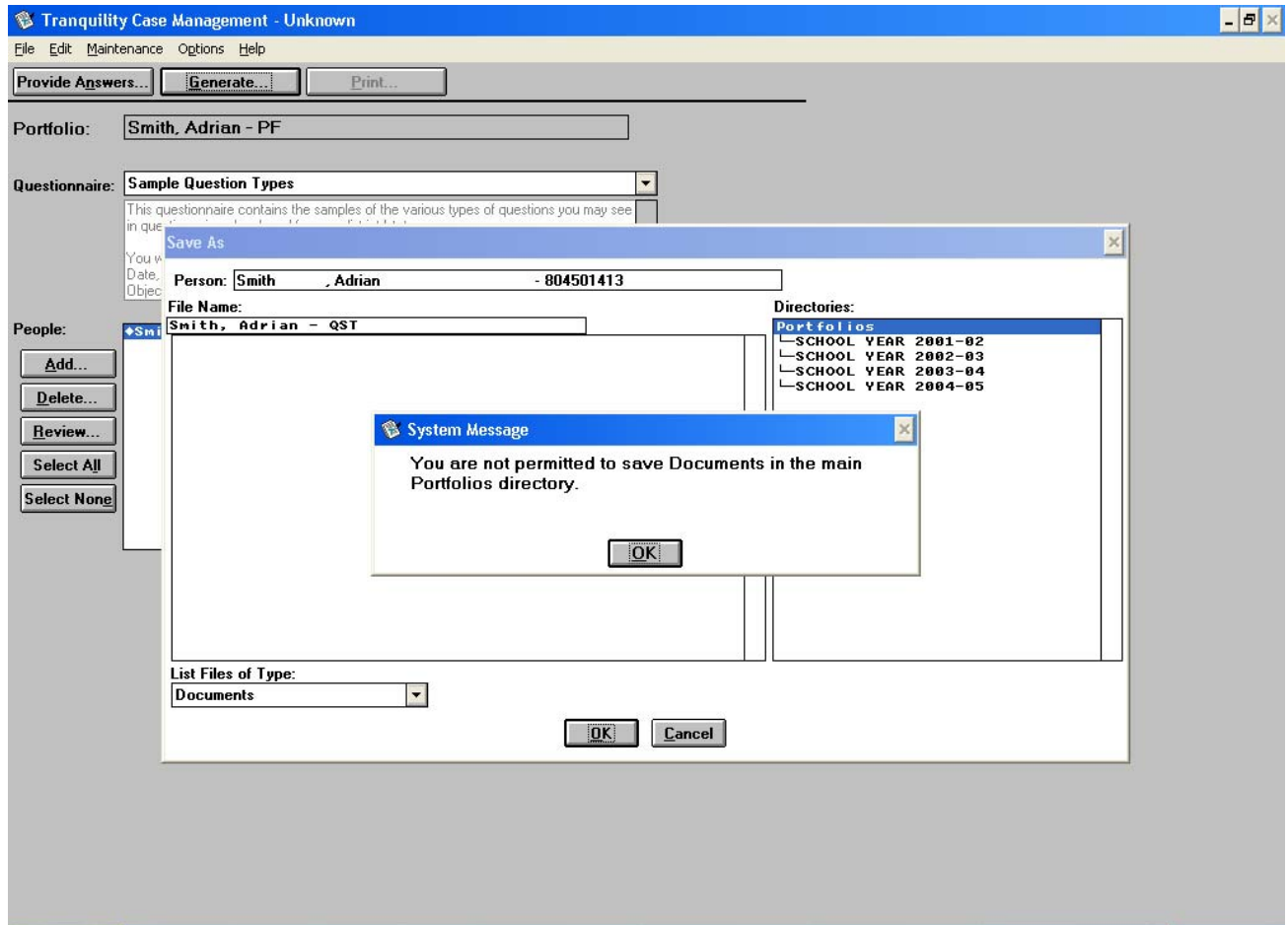
---

## Attempting to Generate a document



Commonly Occurs During	Cause(s)	Solution(s)
Generate process	1. The Default Settings for the <b>Directory to Save Documents</b> is incorrect.	1. Press <b>OK</b> and select <b>Default Options</b> from the <b>Options</b> menu. <ul style="list-style-type: none"><li>• Ensure the <b>Directory to Save Documents</b> line contains <b>DOCUMNTS\</b> only. Do not include the path prior to this level, as it may not be appropriate for all users.</li><li>• Press <b>OK</b>.</li><li>• Generate the document.</li></ul>

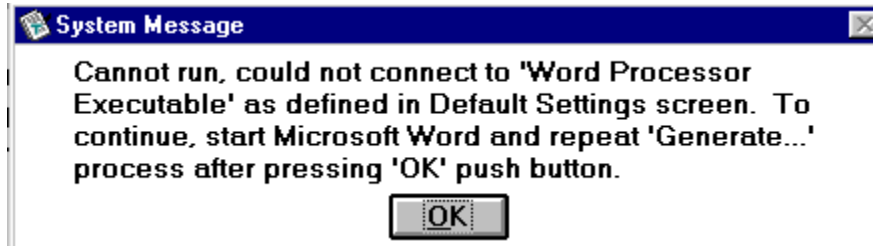
## Trying to Save Documents in the Main Portfolios Directory



Commonly Occurs During	Cause(s)	Solution(s)
Generate process	1. User selected a non-document-designated directory. It is recommended that all documents are store on a yearly basis for easier retrieval.	1. Press <b>OK</b> and select a <b>School Year</b> directory, then press <b>OK</b> .

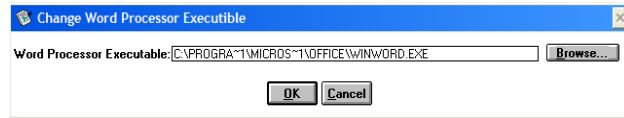


## Cannot Connect to Word Processor when Generating a Document

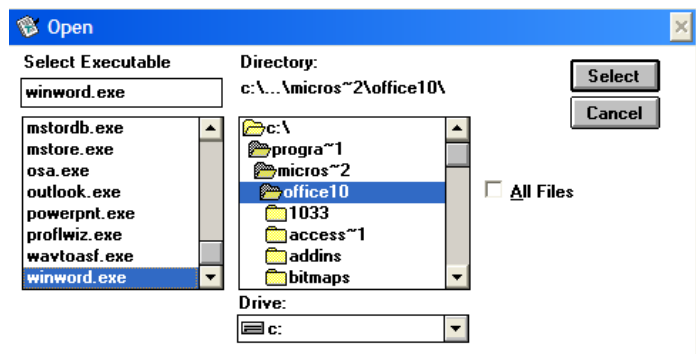


Commonly Occurs During	Cause(s)	Solution(s)
Generate process	1. The Default Settings for the <b>Word Processor Executable</b> is incorrect.	1. Press <b>OK</b> and select <b>Default Options</b> from the <b>Options</b> menu. <ul style="list-style-type: none"><li>• Locate the <b>Word Processor Executable</b> line and press the <b>Browse</b> button.</li><li>• Navigate to the <b>WINWORD.EXE</b>.</li><li>• Press <b>Select</b>.</li><li>• Press <b>OK</b>.</li><li>• Generate the document.</li></ul> 2. You can reset the Microsoft Word executable path. <i>Tranquility 5.0</i> stores the path you set with your account ID so that when you log in, it knows where your executable is located. To set the path, perform the following steps. <ul style="list-style-type: none"><li>• Close your portfolio.</li><li>• From the <b>Options</b> menu, choose <b>Change Word Processor Path</b>.</li></ul>

The following window appears:



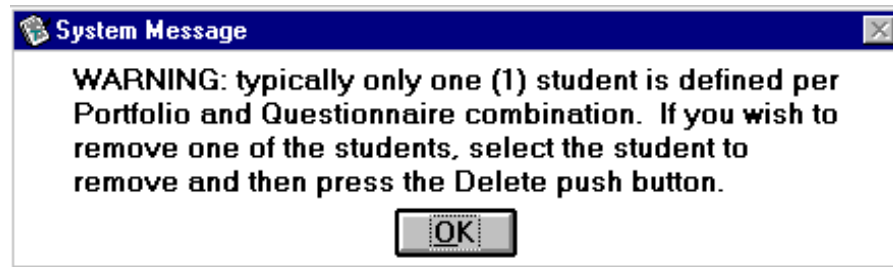
- Press **Browse**. The following window appears:



- Navigate to your winword.exe file. Generally the file is located similarly to the path in the screen shots above.
- Press **Select**.
- Press **OK**.
- Open the portfolio and regenerate the document.



## Adding/Selecting a Student for which a Portfolio and Questionnaire Combination Exists



Commonly Occurs During	Cause(s)	Solution(s)
File New process  General manipulation of the portfolio main screen (user experimenting with the Add button)	1. User selected multiple students for the same portfolio.	1. Highlight the student's that were incorrectly selected and press <b>Delete</b> on the screen. Follow remaining prompts appropriately.

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**Goals and/or Objectives Contain Double Quotes**

<b>Commonly Occurs During</b>	<b>Cause(s)</b>	<b>Solution(s)</b>
Generate process	1. Goals and/or Objectives contain double quotes (“”).	1. Remove all double quotes from goals and objectives. If the user received the goals and objectives from the district lookup banks, the double quotes should be removed from the banks as well. Remember to redistribute the associated goals and objectives tables if this is the case.



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## User receives a Stop Sign

**WARNING:** It is **not recommended to reboot or turn off** your computer if you receive a **STOP** sign message (or a consistent beeping signal), which indicates there is an error. Rebooting or turning off your computer when this occurs will likely result in damaged files. This may further complicate your situation.

### **If you happen to receive a STOP sign, do the following:**

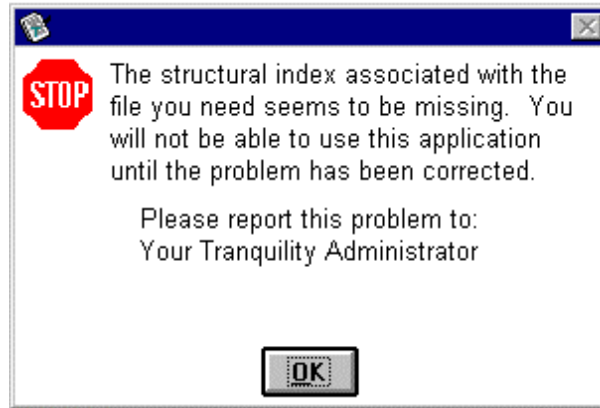
1. Make a note of what you were doing when it appeared.
2. Press the **OK** button
3. At the "**Would you like to view the error log file now?**" message, press the **Yes** button
4. Make a note of what the error log displayed.
5. While pressing the **<CTRL>** button, press the letter **Q**. This will exit you from *Tranquility*.

### **If your computer has "locked up" or is beeping:**

1. Press **Ctrl+Alt+Delete** keys at the same time - the **Task List** should appear.
2. Click on the *Tranquility* task
3. Press the **End Task** push button

If neither suggestion solves your situation, contact your *Tranquility* Administrator.

## Structural Index Missing



Commonly Occurs During	Cause(s)	Solution(s)
Use of program if a file has been damaged or is missing.	<ol style="list-style-type: none"> <li>1. Hardware failure, program terminated while database is left open (e.g., laptop goes into sleep mode, power surge or failure)</li> <li>2. Files missing, moved from anticipated directories</li> </ol>	<ol style="list-style-type: none"> <li>1. Do not use the program until permitted by your <i>Tranquility</i> Administrator.</li> <li>2. Start <i>Tranquility</i> Case Management and Run Housekeeping (See <i>Tranquility</i> Case Management User's Manual for more information). <ul style="list-style-type: none"> <li>• If you receive a Stop Sign during Housekeeping, make note of which table was being updated when the Stop Sign appeared. Contact your <i>Tranquility</i> Administrator and inform him/her of the information you have gathered and the results of running Housekeeping.</li> </ul> </li> </ol>



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## 7. One Page Summaries

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### How to Create an Electronic Portfolio

**Note:** Windows must be running before you can start *Tranquility*.

1. Double click on the *Tranquility* icon.
2. When prompted, enter your **Account** and press **Enter**. Then enter your **Password**, and click **OK**.
3. From the **File** menu, select **New**.
4. Highlight the questionnaire you wish to use then click **OK**.
5. Select the name of the student for whom you are creating the portfolio by highlighting their name and pressing the **ENTER** key. You will notice that the student you selected now appears in the right hand box on the screen.
6. Click **OK**.
7. Highlight the **Portfolios** directory.
8. Click **OK**.
9. To begin answering questions within the questionnaire, click on the **Provide Answers** push button at the top of your screen.
10. Answer each question.
  - Press **F8** to go to the next question or click on the **Next** push button in the Question box at the bottom of your screen
  - Press **F7** to go to the previous or click the **Previous** push button in the Question box at the bottom of your screen.
  - The **F9** key will access the designated **hot key** question (e.g., Case Conference notes). Press **F9** once to jump to the designated question. After reviewing/providing information on the designated question screen, press **F9** again to return to the question from which you left.
  - **F5** will display an entire multiple or picklist choice once highlighted in the available choice list. **F5** also displays the available lookup lists on the **Goals and Objectives** screen.



11. When you have completed answering all of the questions, a message will appear alerting you that you have reached the end of the questionnaire.
  - If you are finished with this questionnaire and answer session, click **OK**. This option will return you to the main portfolio screen.
  - If you would like to remain in the questionnaire, select the “**Remain with this person**” radio button, and then click **OK**.
12. Once you have finished with the questionnaire and have returned to the main screen, to view and/or print your portfolio component, you simply click on the **Generate** push button located at the top of your screen.
13. Select which document you would like to generate by highlighting its title and clicking **OK**.
14. Highlight the directory in which you would like to save this document (e.g., **2003-2004 Documents**).
15. Click **OK**.
16. The document is created in Microsoft Word. This is a word processing document that you can edit and update the information. To print the document, from the **File** menu, select **Print**. To return to *Tranquility*, first choose **File** then **Close**. Next, hold down the **Alt** key on your keyboard and press **Tab** until the *Tranquility* icon is selected, and then release **Alt** key. (To make changes permanent you must change answers in *Tranquility*.)

**Note:** It is not recommended that you exit (i.e., Do not choose Exit from the File menu.) Microsoft Word each time you return to *Tranquility* if you intend to generate additional documents. Doing so, will increase generation time.
17. If you want to:
  - Continue working with the current portfolio, press **Provide Answers** to resume the question and answer interactive session, or **Generate** to create additional documents.
  - Work in another portfolio, from the **File** menu choose **Close**.
18. To close *Tranquility*, select **File** then **Exit** from the menu bar.

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## How to Update an Existing Electronic Portfolio

**Note:** Windows must be running before you can start *Tranquility*.

1. Double click on the *Tranquility* icon. The following window appears:
2. Enter your **Account** and press **Enter**. Then enter your **Password**, and click **OK**.
3. From the **File** menu, select **Open**.
4. Highlight the name of the student portfolio that you want to open.
5. Click **OK**.
6. To begin answering/changing questions within the questionnaire, click on the **Provide Answers** push button at the top of your screen.
7. Answer each question.
  - Press **F8** to go to the next question or click on the **Next** push button in the Question box at the bottom of your screen
  - Press **F7** to go to the previous or click the **Previous** push button in the Question box at the bottom of your screen.
  - The **F9** key will access the designated **hot key** question (e.g., Case Conference notes). Press **F9** once to jump to the designated question. After reviewing/providing information on the designated question screen, press **F9** again to return to the question from which you left.
  - **F5** will display an entire multiple or picklist choice once highlighted in the available choice list. **F5** also displays the available lookup lists on the **Goals and Objectives** screen.
8. When you have completed answering all of the questions, a message will appear alerting you that you have reached the end of the questionnaire.
  - If you are finished with this questionnaire and answer session, click **OK**. This option will return you to the main portfolio screen.
  - If you would like to remain in the questionnaire, select the “**Remain with this person**” radio button, and then click **OK**.
9. Once you have finished with the questionnaire and have returned to the main screen, to view and/or print your portfolio component, you simply click on the **Generate** push button located at the top of your screen.
10. Select which document you would like to generate by highlighting its title and clicking **OK**.
11. Highlight the directory in which you would like to save this document (e.g., **2003-2004 Documents**).
12. Click **OK**.



13. The document is created in Microsoft Word. This is a word processing document that you can edit and update the information. To print the document, from the **File** menu, select **Print**. To return to *Tranquility*, first choose **File** then **Close**. Next, hold down the **Alt** key on your keyboard and press **Tab** until the *Tranquility* icon is selected, and then release **Alt** key. (To make changes permanent you must change answers in *Tranquility*.)

**Note:** It is not recommended that you exit (i.e., Do not choose Exit from the File menu.) Microsoft Word each time you return to *Tranquility* if you intend to generate additional documents. Doing so, will increase generation time.

14. If you want to:
- Continue working with the current portfolio, press **Provide Answers** to resume the question and answer interactive session, or **Generate** to create additional documents.
  - Work in another portfolio, from the **File** menu choose **Close**.
15. To close *Tranquility*, select **File** then **Exit** from the menu bar.

## Reference Cards

### To start a new portfolio

1. Choose **New** from the **File** menu
2. Select a questionnaire
3. Press **OK**
4. Select one student, press **OK**
5. Press **OK**
6. Press **Provide Answers**

### Goals and Objectives Screen

Press **TAB** to move around the screen forward, **SHIFT + TAB** to move backward  
 Use **F5** for lookups  
 Press **Save Goal** before exiting screen

### DO NOT USE DOUBLE QUOTES (") IN ANY OF YOUR ANSWERS!

### Shortcuts

- F5 Allows you to view entire multiple choice/list options that are lengthy
- F8 Next question
- F7 Previous Question
- F9 HOT KEY - Takes you to case conference notes and back

### Definitions

Portfolio - like a hanging file folder  
 Questionnaire - like a manila folder  
 Documents - generated from questionnaires

### Security

If you must leave your computer unattended for a short amount of time, you may **lock *Tranquility*** via the **Options – Screen Lock** function. This will freeze the application until your password is entered. This function is not available within a questionnaire. For greater security, it is always recommended to log out of the application completely.



<p><b>To start a new portfolio</b></p> <ol style="list-style-type: none"><li>1. Choose <b>New</b> from the <b>File</b> menu</li><li>2. Select a questionnaire</li><li>3. Press <b>OK</b></li><li>4. Select one student, press <b>OK</b></li><li>5. Press <b>OK</b></li><li>6. Press <b>Provide Answers</b></li></ol> <p><b>Goals and Objectives Screen</b></p> <p>Press <b>TAB</b> to move around the screen forward, <b>SHIFT + TAB</b> to move backward</p> <p>Use <b>F5</b> for lookups</p> <p>Press <b>Save Goal</b> before exiting screen</p> <p><b>DO NOT USE DOUBLE QUOTES (") IN ANY OF YOUR ANSWERS!</b></p>	<p><b>Shortcuts</b></p> <ul style="list-style-type: none"><li>F5 Allows you to view entire multiple choice/list options that are lengthy</li><li>F8 Next question</li><li>F7 Previous Question</li><li>F9 HOT KEY - Takes you to case conference notes and back</li></ul> <p><b>Definitions</b></p> <ul style="list-style-type: none"><li>Portfolio - like a hanging file folder</li><li>Questionnaire - like a manila folder</li><li>Documents - generated from questionnaires</li></ul> <p><b>Security</b></p> <p>If you must leave your computer unattended for a short amount of time, you may <b>lock Tranquility</b> via the <b>Options – Screen Lock</b> function. This will freeze the application until your password is entered. This function is not available within a questionnaire. For greater security, it is always recommended to log out of the application completely.</p>
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## GLOSSARY

**Action Buttons** – buttons found at the bottom of Core Reporting screens, when seen in Case Management, which define the actions that the user can take on the screen. Accessible buttons may vary depending on the user's security rights.

**Archive** – the movement of student data from the active dataset to the inactive dataset; historic data may be moved back from the inactive dataset to the active dataset if the student returns

**Case Management** – The component of *Tranquility for Special Education* that collects information for Special Education documentation and generates documents based on the information collected.

**Core Reporting** – The component of *Tranquility for Special Education* that houses the Special Education information required for federal and state reporting.

**Date Field** – data entry field which is completed by entering 8 character date (DDMMYYYY).

**Demographic Information** – Information relating to the student's ID number, school, and Parent/Guardian information. In *Tranquility*, this information is usually pulled from the district's SIS.

**Directory** – a listing of the files stored in memory (usually on a hard disk). In Case Management, the directories are defined as the portfolio directory in which all student portfolios are stored and individual school years in which student documents are stored.

**District Integration** – overnight process which updates school and district *Tranquility* information so the information matches; D.I. is also used to update student demographic information from the SIS.

**Document** – the completed MS Word form (IEP, progress chart, etc.)

**Ellipsis** – button used on screens to access tables with codes and descriptions; assists with data entry

**Executable** - a file (always a program of some kind) that can be run by the computer directly. In Case Management, *Tranquility* must be able to find the executable associated with Microsoft WORD in order to generate documents (IEP, letters, progress charts).

**External Questions** – questions in Case Management that access the Core Reporting Screens. They require a SAVE before leaving the screen and often contain lists for data entry found behind ellipsis buttons.

**FoxPro** - the database system *Tranquility for Special Education* version 5.0 is based on.

**Generate** – merging of questionnaire template with answers provided to obtain document.

**GOTO** – in Case Management, the GOTO button accesses the list of unindented questions in the questionnaire, allowing users to skip from one question to the next without having to navigate through all of the questions in between.

**Housekeeping** – process of reindexing files to optimize database performance.

**Include in CM** – check box on Core Reporting screens which indicates that data from a record will be included in Case Management document creation.

**List Box** – in Core Reporting screens, the box which houses the list of saved records for a student. Each line item in the list box will reflect a saved record (i.e. referral date, placement changes, etc.). Details are obtained by highlighting each line item in the list.

**Lookup Field** – data entry field which is completed by accessing an ellipsis button.

**Mark Students** – process which flags a student record for transmission during the District Integration process.

**Multi-Select** – the ability within *Tranquility for Special Education* to choose more than one selection in a list at one time.

**Multi-Section Screen** – Core Reporting screens that contain two data entry areas within the screen. The Assessment screen is an example of this type of screen as it has two sections, a header and detail. These screens allow for two ADD processes and may require 2 SAVE commands to complete.

**Navigational Buttons** – buttons found on the bottom of questionnaire screens in Case Management to assist the user in “navigating” or moving through the screens.

**Portfolio** – an electronic cumulative folder; one student’s data is stored in a portfolio. Students should only have **one** portfolio created.

**Questionnaire** - sequenced set of questions used in Case Management to create data for generation of the IEP.

**SIS** – Student Information System; the district’s student data tracking system such as SASIxp.

**Text Field** – data entry field which is completed by typing in text; no table is accessed.

**Transmit to District/School** – indicates the student record has been marked for update during District Integration; at schools student record will say “Transmit to District” and at the district will say “Transmit to School”; record is automatically marked when Add/Edit are chosen, and record is saved.



**Word Processor** - an application that provides the user with tools needed to write, edit, and format text; and to send it to a printer. In *Tranquility for Special Education* all users must have access to Microsoft Word.



