



Goal Tracker

Daily Record Keeping for Special Education

Best Practices for Implementing Goal Tracker

This document is intended to aid administrators in the implementation and setup of Goal Tracker. The document includes process examples and important questions you should consider when discussing the implementation of Goal Tracker. While these examples are the most common, you are not necessarily limited to the ones listed here. If you have questions about how to implement Goal Tracker, please contact us.

Definitions:

User: Any person that has access to and uses Goal Tracker.

Permissions: A set of rules that determines what each user in the system has the ability to do.

Student Assignments / Assigned Students: Before users have access to track data for a particular student, that user must be assigned to that student. This is what grants them access to that student.

Student / User Populations: The list of all the users and students. People who manage the student and user populations will be responsible for adding students and users, modifying students and users, and archiving students and users.

Progress Report: Printed reports that contain the student's progress data. These reports need to be printed by a user with access to the student's goals.

Share Goals: Is the ability to for a user to share their goals with another user for collaboration, or to a case manager for generating a progress report for the student.

Administrator: A user with the rights to most or all of the areas of Goal Tracker. They can both manage the goal tracker account and take data if needed.

Coordinator: A user that has access to many of the administrative features in Goal Tracker, such as adding and removing students and users.

Case Manager: A user that manages the successful completion of an IEP or set of goals. This user usually has teachers that assist with data collection.

Teacher: A user that is primarily responsible for measuring and recording data into Goal Tracker.

Important Questions to Consider:

- **Who will be entering goals?**

Goals can be created by any individual that has access to the student. This could be a Teacher, Paraprofessional, Case Manager, or even a Coordinator. In the end, the user tracking data for the student and the user who will print the report (if different) will need access to the student's goals.

If each teacher or paraprofessional enters their own goals: They will either have to share all of their goals with the user who is responsible for creating the progress report, or they will have to be responsible for printing their own progress reports. (For later assembly)

If the case manager enters all the student's goals: The Case Manager will be responsible for sharing the goals with the users who will be taking data for that student. This is usually the preferred method if the case manager is responsible for creating the progress report.

- **Who will be printing the progress reports?**

As stated above, the user who is responsible for printing reports will need to have access to all of the student's goals and data. It will be important to determine who will be entering a student's goals so that you can inform those users to share goals with the users who are creating reports.

- **How much training will your staff receive?**

Staff that receives thorough training will have a better understanding of Goal Tracker and will be able to handle more flexible permissions. Organizations that do not have the time or budget for training may want to go with a less flexible permission set because users will be less able to manage themselves.

Implementation Examples:

Large Organizations >500 Students

Example 1:

Permission Structure:

- **Administrator (a few per organization):**
 - o All Access
- **Coordinator (a few per building):**
 - o Create & modify students
 - o Create & modify users
 - o Assign students to teachers
 - o Track data
- **Case Manager (a few to many per building):**
 - o Assign students to teachers
 - o Track data
- **Teacher (many per building):**
 - o Track data only

Process:

- **Administrators** are responsible for the management of Goal Tracker settings. They may or may not be involved in the everyday process.
- **Coordinators** are responsible for managing the population of users and students in Goal Tracker. They will make any required changes to users with access to the system, and to student information. They may also make changes to the student assignments if needed.
- **Case Managers** will be responsible for assisting coordinators in assigning students to teachers that need access for data tracking. This permission level is created to distribute the load, so that teachers are not subject to delays.

- **Case Managers** may also be responsible for assembling the progress report from data that has been taken by teachers. If this is the case, then teachers will have to share goals with the case manager who will assemble the report.
- **Teachers** and or paraprofessionals will be primarily responsible for collecting and entering data into Goal Tracker.

Example 2: (changes from previous example in Green)

Permission Structure:

- **Administrator (a few per organization):**
 - All Access
- **Coordinator (a few per building):**
 - Create & modify students
 - Create & modify users
 - Assign students to teachers
 - Track data
- **Case Manager (a few to many per building):**
 - Create & modify students
 - Assign students to teachers
 - Track data
- **Teacher (many per building):**
 - Assign students to teachers
 - Track data

Process:

- **Administrators** are responsible for the management of Goal Tracker settings. They may or may not be involved in the everyday process.

- **Coordinators** are responsible for managing the user population in Goal Tracker. They will make any required changes to users with access to the system. They may also make changes to the student assignments if needed.
- **Case Managers** will be responsible for managing the student population in Goal Tracker as well as assigning students to teachers that need access for data tracking. This permission level is created to distribute the load, so that teachers are not subject to delays.
- **Case Managers** may also be responsible for assembling the progress report from data that has been taken by teachers. If this is the case, then teachers will have to share goals with the case manager who will assemble the report.
- **Teachers** and or paraprofessionals will be responsible for assigning themselves only the students that they need access to. This gives teachers more flexibility, but also more responsibility. Teachers are also primarily responsible for collecting and entering data into Goal Tracker.

Mid-Size Organizations >200 Students

Example 1:

Permission Structure:

- **Administrator (a few per organization):**
 - o All access
- **Case Manager (a few per building):**
 - o Create and modify students
 - o Create and modify users
 - o Assign students to teachers
 - o Track data
- **Teacher (many per building):**
 - o Track data only

Process:

- **Administrators** are responsible for the management of Goal Tracker settings. They may or may not be involved in the everyday process.
- **Case Managers** will be responsible for managing the user and student population in Goal Tracker as well as assigning students to teachers that need access for data tracking. This permission level is created to distribute the load, so that teachers are not subject to delays.
- **Case Managers** may also be responsible for assembling the progress report from data that has been taken by teachers. If this is the case, then teachers will have to share goals with the case manager who will assemble the report.
- **Teachers** and or paraprofessionals will be primarily responsible for collecting and entering data into Goal Tracker.

Example 2: (changes from previous example in Green)

Permission Structure:

- **Administrator (a few per organization):**
 - o All access
- **Case Manager (a few per building):**
 - o Create and modify students
 - o Create and modify users
 - o Assign students to teachers
 - o Track data
- **Teacher (many per building):**
 - o Assign students to teachers
 - o Track data only

Process:

- **Administrators** are responsible for the management of Goal Tracker settings. They may or may not be involved in the everyday process.
- **Case Managers** will be responsible for managing the user and student population in Goal Tracker. They may also assist in assigning students to other users.
- **Case Managers** may also be responsible for assembling the progress report from data that has been taken by teachers. If this is the case, then teachers will have to share goals with the case manager who will assemble the report.
- **Teachers and or paraprofessionals will be responsible for assigning themselves only the students that they need access to. This gives teachers more flexibility, but also more responsibility.** Teachers are also primarily responsible for collecting and entering data into Goal Tracker.

Small Organizations <200 Students

Example 1:

Permission Structure:

- **Modified Administrator (a few per organization):**
 - All Access (usually without billing)
 - Create and modify users
 - Create and modify students
- **Teacher (many per building):**
 - Assign students to teachers
 - Track data

Process:

- **Administrators** are responsible for the management of Goal Tracker settings. They are also responsible for the management of the user and student populations.
- **Teachers** and or paraprofessionals will be responsible for assigning themselves only the students that they need access to. Teachers are also primarily responsible for collecting and entering data into Goal Tracker.

Example 2: (changes from previous example in Green)

Permission Structure:

- **Modified Administrator (a few per organization):**
 - All Access (usually without billing)
 - Create and modify users
 - Create and modify students
- **Teacher (many per building):**
 - Create and modify students
 - Assign students to teachers

- Track data

Process:

- **Modified Administrators** are responsible for the management of Goal Tracker settings. **They may also be responsible for the management of the user and student populations.**
- **Teachers and or paraprofessionals will be responsible for managing the students in Goal Tracker that they need.** They will also assign themselves only the students that they need access to. Teachers are also primarily responsible for collecting and entering data into Goal Tracker.

Individuals, Single Departments <50 Students

Example 1:

Permission Structure:

- **Teacher / Administrator (usually all users):**
 - All Access (usually without billing)
 - Create and modify users.
 - Create and modify students
 - Assign students to teachers
 - Track data

Process:

- **Teacher / Administrators** are responsible for the management of all aspects of Goal Tracker. This permission set is only recommended for small organizations with only a few staff members.

Setup Details:

This section details the process of setting up Goal Tracker. These are just guidelines, for questions please contact us.

The following information can be imported automatically by Goal Tracker during setup as long as it meets our formatting standards.

- Users and Permissions
- User Settings (tabs, presets, etc)
- Students
- Student Assignments

Maintenance:

If you purchase our maintenance package, we will update the above information for you on a yearly basis. If you have a large organization, this can save a lot of manual entry time.