

AEPSi™ Administrator Guide

· P A U L · H ·
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Managing Your AEPSi Account

When you log in to your AEPSi account, you will be taken to your **My AEPSi** page. From the **My AEPSi** page, you are able to see news and updates posted by Brookes Publishing Co. (the developer of AEPSi) under the **What's New** section; access any messages posted by your program and/or Enterprise program under **Messages**; and have quick links to any Child, Class, or Program Reports under **My Reports**.

The tabs along the top of the page allow you to navigate to different sections of the site. The tab on the far left is the **Admin** tab—this will take you to a section of the site specific to AEPSi Administrators, where you will be able to access all of the features that allow you to manage your AEPSi account.

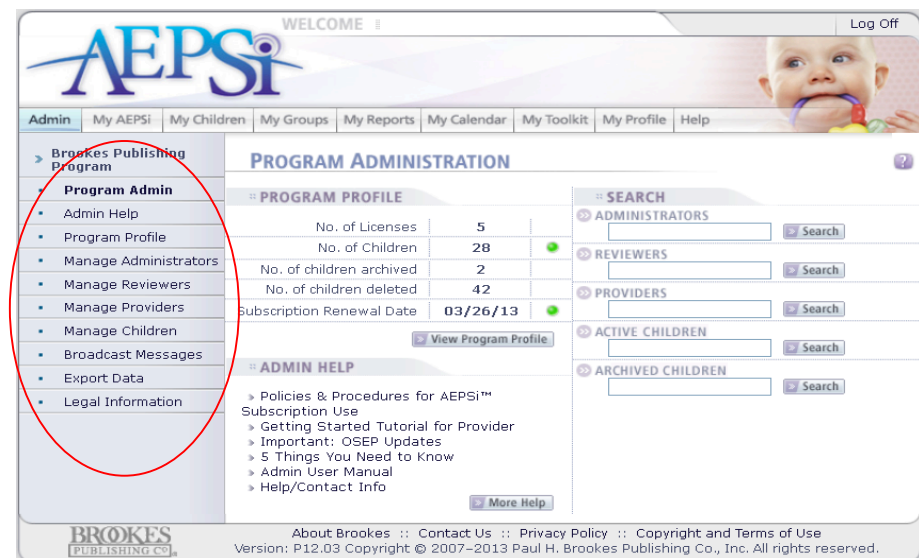


When you click the **Admin** tab, you will be taken to your **Program Administration** home page. On this page, you have quick access to the information you need to manage your AEPSi account, including help documentation and information about your program and subscription details, as well as the ability to search for users and children in your account.

Left Menu Navigation

The left menu contains links to all of the different areas within the **Admin** section. You will be able to access this same menu from any area of the **Admin** section.

The area you are currently in will be highlighted in bold.



Program Administration Home Page

The content on your **Program Administration** home page offers you a quick and easy way to access the information you need to manage your AEPSi account. At the top left you will see the **Program Profile**, which displays the number of licenses purchased for your subscription, the current number of active child records in your AEPSi account, the current number of archived child records in your AEPSi account, the number of child records that have been deleted in your AEPSi account for the current subscription year, and the subscription renewal date. Next to the number of child records and subscription renewal date, there may be a blinking alert icon. The AEPSi system will provide the following alert messages:

- **Number of Children:**
When the number of current active child records exceeds the number of child licenses by more than 20%, you will see a blinking alert light. Your program may receive an invoice to pay for those additional child records at that time, or the additional child records may be reconciled when it is time to renew your subscription.

The screenshot shows the AEPSi Program Administration interface. The 'PROGRAM PROFILE' section contains the following data:

| | | |
|---------------------------|----------|---|
| No. of Licenses | 5 | |
| No. of Children | 28 | ● |
| No. of children archived | 2 | |
| No. of children deleted | 42 | |
| Subscription Renewal Date | 03/26/13 | ● |

A yellow callout box labeled 'Blinking Alert Light' points to the green alert icon next to the 'No. of Children' value. A red arrow points from the 'Number of Children' bullet point to the 'No. of Children' row in the table.

- **Subscription Renewal Date:**
You will see a blinking alert light 90, 60, and 30 days before it is time to renew your subscription.

*Note: Exceeding your number of child licenses purchased will **not** result in losing access or functionality to the site.*

You can view your full program profile by clicking the *View Program Profile* button.

To the right of the Program Profile Summary is the *Search* function. To search for an Administrator, Reviewer, Provider, or child in your program, type the first name or last name in the corresponding search field and click the *Search* button. This will pull up a link to that person's profile. You can also search for a Child Profile by entering the Child ID in the search field.

The last section is **Admin Help**. Here you will find the tutorial for getting started with AEPSi, the Admin User's Manual, and a quick link for help/contact information. Clicking the *More Help* button, or clicking the *Admin Help* link on the left menu navigation, will take you to more help options.

Program Profile

To view the **Program Profile**, you can either click the *View Program Profile* button on your **Program Administration** home page, or click *Program Profile* on the left menu navigation in the **Admin** section. The **Program Profile** will display the name of the program, program type, address, city, state, and zip. In addition, there are optional fields for the phone number, fax number, and website address.

Most of this information will be completed for you when you start your subscription, but you may make any additions or changes by entering information in these text fields and clicking the *Save Changes* button.

Classrooms

Another field in the **Program Profile** is classrooms. You have the option to create classrooms by entering classroom names in the text area, separated by semi-colons. The classrooms you create will appear in a dropdown menu in the Child Profile and certain report request forms.

When an Administrator or user creates a child record, he or she can assign the child to a classroom from the dropdown menu.

The classroom dropdown menu will also appear when creating reports, which allows your users to create group reports for a particular class. There is no limit to how many classrooms can be created.

*Note: You will learn more about the Classrooms field in **Section 3: Managing Your Children** and **Section 4: My Reports**.*

The **Program Profile** page is also where you can create custom fields to add to a child's profile. You will learn how the custom fields work in **Section 3: Managing Your Children**.

Delete Child Profiles Setting

As an Administrator, you have the ability to prevent Providers from deleting child profiles. This is a safeguard to make sure child data is not deleted by accident. If you do not want Providers to have the ability to delete child profiles, click the checkbox next to "Prevent providers from deleting child profiles." If the checkbox is unchecked, Providers will be able to delete child profiles.

| SUBSCRIPTION DETAILS | |
|-------------------------------------|----------|
| Number of Licenses | 5 |
| Current Number of Active Children | 28 |
| Current Number of Archived Children | 2 |
| Number of Deleted Children | 42 |
| Subscription Renewal Date | 03/26/13 |
| Subscription Start Date | 03/26/12 |
| Account Status | Active |
| Your Program's Enterprise ID | 101557 |
| Last Child Import | 06/06/11 |
| Renewal Alert Emailed | 01/25/13 |
| Easy IEP Export | Enabled |

Prevent providers from deleting child profiles:

If your program is part of an Enterprise account, the Enterprise Administrator also has the ability to prevent providers from deleting child profiles. If the Enterprise Administrator has selected this option, you will see the following message on your **Program Profile** page:

“The option to prevent Providers from deleting child records has been selected by your Enterprise Administrator.”

Subscription Details

The **Program Profile** page also contains details about your AEPSi subscription. That information includes:

- **Number of Licenses:** The number of child records purchased for the current subscription year.
- **Current Number of Active Children:** The current number of active child records in your AEPSi account (those not archived or deleted). This number will be updated whenever a new child record is created, as well as when a child record is archived or deleted.
- **Current Number of Archived Children:** The current number of archived child records in your AEPSi account. This number will also be updated whenever a child record is archived or when an archived child record is deleted or reactivated.
- **Number of Deleted Children:** The number of child records that have been deleted during the current subscription year. Only children for whom an assessment has been created will be included.
- **Subscription Renewal Date:** The date when it is time to renew your subscription. Well in advance of this date, you or the responsible party will want to contact Customer Service to renew your subscription.
- **Subscription Start Date:** The start date of your AEPSi current subscription period.
- **Account Status:** Your account status will display as one of the following: active, expired, inactive, or locked.
- **Your Program’s Enterprise ID:** If your program is part of a larger Enterprise group, your Enterprise ID Number will be displayed here.
- **Last Child Import:** The date and file type of the last child imported into your program from another source.
- **Renewal Alert E-mailed:** The date the last e-mail was sent to your program’s administrator(s) to notify you that it is time to renew your subscription.
- **Easy IEP Export:** If your program has opted to have access to the Easy IEP Export feature—found under the Program Reports page of your **My Reports** section—this field will read “enabled.”

Account Status

Below is a brief description of the possible values for account status:

- **Active:** Your account is active and functional.
- **Expired:** Your subscription has expired, and you have not renewed your subscription. All users still have access to your AEPSi account, but you must renew your subscription immediately.
- **Inactive:** You have cancelled your AEPSi account. Users will no longer be able to access your account.
- **Locked:** Your AEPSi account has been locked, and users are unable to access the account. When an account is locked, it means that payment for subscription renewal is past due. Once the subscription has been renewed, the account will be made active again, and users will be able to access the account.

*Note: Exceeding your number of child licenses purchased will **not** result in losing access or functionality to the site.*