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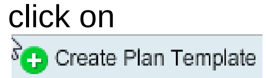
EXCEED® RTI
Adding an Intervention Plan

Description	Action
Intervention plans are associated with students, so the first step is to select a student's name from your student list.	• Go to your Student List (or Watch List) • Hover over a student name • Click the (Student Options) icon • Select **Add Plan** from the dropdown menu
The **Plan Details** tab displays. Start by selecting a domain from the Domains panel. The information in the other panels will change depending on which domain you select.	• Select a Domain from the Domains Panel
The **Intervention Plan Details** panel becomes active. This is where you name the plan and enter tier and duration details. Required fields are indicated by a red asterisk * **Key Point:** *It's important to give the Plan a name that identifies the plan, and that other educators will recognize and understand.*	• Enter a Plan Name • Select a Tier within the domain from the dropdown • Select the Language • Click the Calendar icon and select a Start Date • Enter the duration of the Plan in weeks • Click the icon to assign the Plan to yourself…. ○ or – select the edit icon to select a staff member • Enter any Plan Notes in the text box • Click **Save Plan**

Description	Action
The **Plan** screen displays with the **Select Goals** tab selected. Here you'll select a goal from the goal bank, identify the grade level, and select an area of concern. The goals available in the goal bank are determined by your district. **Key Point:** *You can select more than one Area of Concern by holding down the CTRL key.*	• Click the **Goal Bank** dropdown and select a goal from the list • Click the **Grade Level** dropdown and select a grade level from the list • Select an Area of Concern
The Search results panel displays a list of goals related to School Refusal. Once again, these goals are determined by your district. Notice that once you select goals, they display in the Selected Goals panel on the right side of the window.	• Click a check box beside the goal you want to add to the plan. • Click **Add Selected Goals**
The screen automatically displays with the **Plan Goals** tab selected. The Plan Goals you selected on the Select Goals tab is displayed in the Plan Goals panel. The beside the goals in the Plan Goals panel indicates that progress monitoring has not been set up yet.	• Click on the goal you added on the previous screen
The panel on the right is where you customize the plan goals for a student. The fields on this screen change based on the goal selected. The top portion of the panel generates a description of target metrics. There are also fields for measure and start date of the plan. **Key Point:** *You can assign the plan to another educator in the Primary Staff field.*	• Complete the fields beside the text description • Select a Measure from the dropdown • Click the calendar icon to set the start and end dates for the plan
The last two areas of the panel are to set baseline and target metrics, and to activate progress monitoring if desired. The M beside the goals in the Plan Goals panel indicates that progress monitoring is Active.	• Enter a baseline and target measurement for the plan • Click the **Active** button to activate plan monitoring • Select the frequency of monitoring from the **Frequency** dropdown • Click on the day(s) to monitor • Click **Save Goal**

Description	Action
The window doesn't automatically go to the next tab because there may be additional Goals that need to be completed. Move on to the next tab.	• Click on the **Interventions** tab
The **Interventions** tab displays with Intervention Selector, Selected Interventions, and Intervention Details panels. Once you select Add Intervention, you must specify if the intervention is Individual or Custom.	• Click the **Add Intervention** button • Click the a strategy type (Individual or Custom) • Click the **Intervention Type** dropdown and select **Individual** • Select an Area of Concern
Once you select and intervention, the **Intervention Details** panel displays. This is where you specify when intervention logging will occur. Reminders will be placed on your dashboard to log the interventions on the days you select here.	• Click the calendar icon to set the start and end dates for the intervention • Click the Frequency dropdown and select **Weekly** • Click on the days you want to progress monitor • Click the **Copy from Schedule** button to copy the intervention schedule to the intervention logging schedule • Click on the **Save Intervention** button
The intervention you just set-up displays in the Selected Intervention panel. You can now add another Individual or Custom intervention.	

EXCEED® RTI
Creating Plan Templates

Description	Action
You can create a plan template from an existing open intervention plan.	• Add an intervention plan. If you need additional help adding an intervention plan, please refer to the Add a Plan Exercise. • Once you have completed all the tabs of the intervention plan, click on the summary tab. • From the summary tab, click on  in the lower right hand side of the screen.
A pop up box displays asking for grades.	• Select the appropriate minimum grade. • Select the appropriate maximum grade. • Click on Save.
The Plan template will be available for all grades that were selected using the Minimum and Maximum grades. Only the schools that you as a user has access will be able to use these saved Plan Templates.	• Select these templates from the Plan Details tab in the Plan Templates Panel when setting up a plan for a student.

EXCEED® RTI
Creating Student Groups

Description	Action
Students Groups can be used to manage intervention plans for multiple students.	• Click on the **Quick Links** button • Select **View Student Groups** from the dropdown menu
The **Student Groups Maintenance** screen displays. The existing student groups are listed on the left side of the screen. A student group can be added by selecting the "Add" button at the bottom of the Student Groups screen.	• Click the **Add** button on the lower left
The fields on the right side of the screen are blank and ready for data entry. Required fields are indicated by a red asterisk *	• Enter a Name for the new student group • Enter a description of the student group • Click the **School** dropdown button and select a school • Click the **Domain** dropdown button and select a domain • Complete the optional fields if desired • Click the icon to assign the Plan to yourself…. ○ or – select the edit icon to select a staff member as primary staff • Click the **Add** button to add staff members for the group • Click **Save** • Click **OK** to close the message box
The new student group displays in the list of groups in the left panel.	

Add a Student to a Student Group	
Description	**Action**
Once a student group has been created, you can add student to the group.	• Go to your Student List (or Watch List) • Hover over a student name • Click the  (Student Options) icon • Select **Add to a Group** from the dropdown menu
The Add Student to Group pop-up window displays. **Key Point:** *Student can only be assigned to students groups for their school.*	• Click the dropdown button to display your list of student groups • Click on a Student Group name
Then click save to assign the student to the student group.	• Click **Save**

EXCEED® RTI
Document an Intervention

Description	Action
You can document an intervention for a student without creating a full intervention plan. This is referred to as an “ad hoc” intervention and would be help for documenting a one-time intervention that doesn’t require monitoring.	• Go to your Student List (or Watch List) • Hover over a student name • Click the icon • Select **Document an Intervention** from the dropdown menu
The Ad Hoc Student Intervention screen displays. Use the buttons in the Intervention Selector panel to create the intervention. The intervention can be individual or custom.	• Click the **Add Intervention** button • Click the **Select Domain** dropdown button and select a domain • Click the **Select Tier** dropdown button and select a tier • Click **Individual** Strategy Type button • Click the **Intervention Type** dropdown and select Individual • Click the **Area of Concern** dropdown and select from the list • Select an Intervention from the list displayed

Description	Action
The Intervention Details panel is where you enter date, time, and duration details. Required fields are indicated by a red asterisk *	• (Optional) Edit the description of the Intervention • Click the  icon to assign the Intervention to yourself…. ○ or – select the edit icon to select a staff member • Click on the **Yes** button to enter schedule information • Click the Calendar icon and select a Start Date • Click the Calendar icon and select a Targeted End Date • Enter the time for the Intervention, and the duration in minutes • Click on the **Frequency** dropdown and select how often intervention will be applied • Click on the **Yes** button to enter the schedule for the intervention logging • Click the **Copy from Schedule** button to copy the Intervention schedule to the logging schedule • Click **Save Intervention**

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EXCEED® RTI
Entering a Note

Description	Action
You can add a note to a student’s information that is helpful for documenting important events that impact a student’s performance.	• Go to your Student List (or Watch List) • Hover over a student name • Click the  icon • Select **Add a Note** from the dropdown menu
This text box is different than the one in Add a Plan because you can make it appear on the student’s graph.	• Click the dropdown and select a domain • Click the Calendar icon and select the event date • Enter a note about the event in the text box • (Optional) Click the **Timestamp Note** button to enter the date and time the note was added/edited. • Click the More Options check box • Enter a title for the event • Click the Major Event Show on Graph check box • Click the **Save** button

EXCEED® RTI
Progress Monitoring

Entering Scores From the Progress Monitoring Panel

Description	Action
Once you have a plan for a student, you will need to enter scores to measure progress towards the plan goals.	• On the Educator Dashboard • Click on an entry in the Progress Monitoring panel
The General Report Measure Progress Monitoring Score screen displays. Existing scores display on the left and behaviors display on the right. You enter scores for the behaviors on the right side.	• Click the Calendar icon and select a Score Date • Enter a score in the total field • Click the **Save** button

Entering Scores From the Student Options Menu

Description	Action
Once you have a plan for a student, you will need to enter scores to measure progress towards the plan goals.	• Go to your Student List (or Watch List) • Hover over a student name • Click the icon • Select **Add Scores/Progress** from the dropdown menu
The Progress Monitoring Scores window displays. Existing scores display on the left and behaviors display on the right. You enter scores for the behaviors on the right side. **Key Point:** *You can have the system calculate the score by entering a range in the Calculate fields.*	• Click on the item you want to log on the right side of the window • Click the Calendar icon and select a Score Date • Enter a score in the total field • Click the **Save** button

Reviewing Student Progress	
Description	**Action**
Once you have a plan for a student, and you have entered scores for the plan goals, you can view the student's progress on a graph.	• Select the student from your Watch List • Select **Monitoring** from the gray navigation panel
The **Plan** Tab panel displays on the right. Hovering over an item in the Legend panel will highlight the line on the graph. To see progress against additional goals, use the Choose a Measure/Goal dropdown.	• Click on the **Choose a Measure/Goal** dropdown • Select the Goal you want to display
The new Goal measures display in the **Plan** tab.	

EXCEED® RTI
Roster Score Entry

Description	Action
You can enter scores for a group of students from a single screen. For example, entering scores for all members of a student group. The first step is to display a list of students in the Student List panel.	• Display a list of students in the Student List panel (i.e., My Watch List, or a Student Group) • Click on the **Quick Links** button • Select **Enter Roster Scores** from the dropdown menu
The **Roster Score Entry** screen displays. Notice that the student list you selected is still shown. All scores entered here will be applied to each student on the list.	• Click the **Select a Measure** button • Click on the ▶ button beside the **Domain** to expand it • Click on the ▶ button beside the **Area of Concern** to expand it • Select one **Measure** • Click the **OK** button • Click the **Calendar** icon and select a Score Date • Click the **Create Scores** button
A series of score boxes displays on the **Roster Score Entry** screen, with a score entry box for each student on the list. Here you can enter the scores for the selected date and the measure, and it will be applied to each student.	• Enter a score for each student • If the student was not tested today, click the **Not Tested** box • If you want to remove a student from the list, click the **red** ✕ • When all scores have been entered, click the **Save** button

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EXCEED® RTI
Schedule a Meeting

Description	Action
You can schedule meeting (Events) in EXCEED.	• Go to your Student List (or Watch List) • Click on a student name to go to their profile • Click on **Events** • Click on **Schedule New Meeting**
The **Schedule Meeting** screen displays. This is where you specify the details for the meeting.	• Click on the **Program Type** dropdown and select **RTI** • Click the **Event Type** dropdown and select an event type • Click the Calendar icon and select a Due Date • Click the Calendar icon and select a Scheduled Date • (Optional) Enter a title in the **Event Title Details** field • Enter the Scheduled Time for the meeting • Click the icon to assign the Plan to yourself…. • (Optional) Click on **Add Staff** to schedule meeting participants • Click **Save**

EXCEED® RTI
Viewing a Student's Profile

<table>
<tr><th>Description</th><th>Action</th></tr>
<tr><td>You can view a student's profile to find information on the student's demographics, attendance, growth, and many other things.</td><td>

- Go to your Student List (or Watch List)
- Click on a student name

</td></tr>
<tr><td>The student profile displays with the Summary tab selected. Each tab presents specific sets of information. Summary information includes the student's name, district, school, contacts, accommodations, programs, and current grades.

</td><td>

- Click on each link in the navigation panel to view information specific to the student you selected

</td></tr>
<tr><td>Information you an access from the student profile includes:

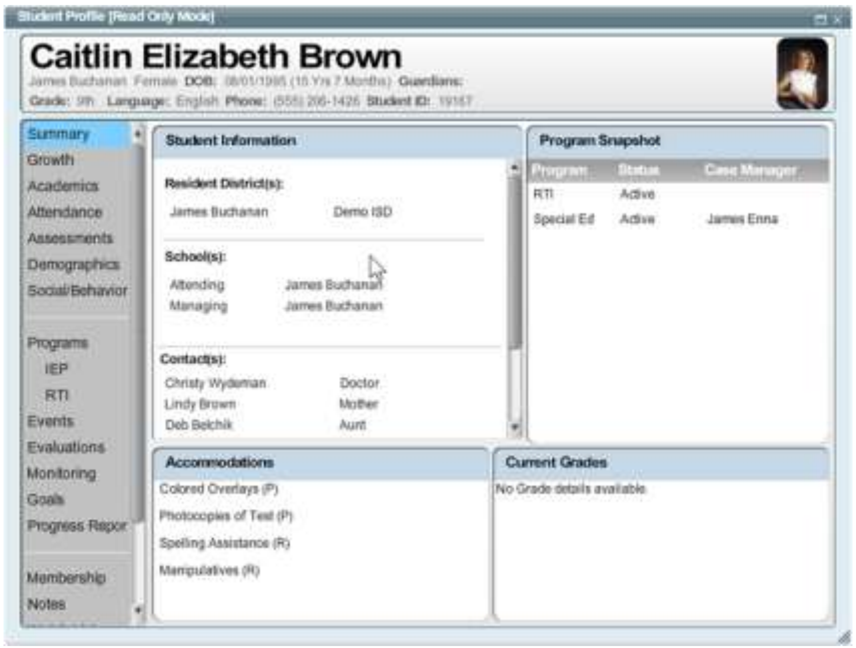
- Growth
- Academics
- Attendance
- Assessments
- Demographics
- Social Behavior
- Programs (RTI/IEP/etc)
- Events
- Evaluations
- Monitoring
- Goals
- Progress Reports
- Membership
- Notes
- Watch List
- Contact Log
- Attachments
- Audit Log

You can also view the student's profile from other locations in EXCEED by using the Profile button.

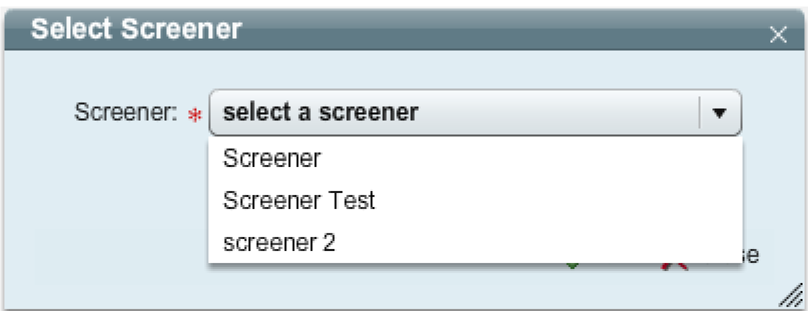
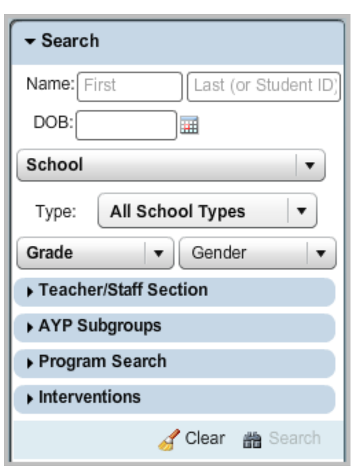
</td><td>

- Click the  button at the bottom of a page

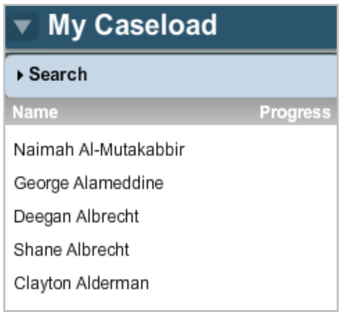
</td></tr>
</table>

Description	Action
A "read only" version of the student profile displays. The information in this window can be viewed, but no changes are allowed.   **Key Point:** *Don't confuse the Student Profile "read only" window for the active window. If you find that you can't make changes to areas of the student profile, check to make sure you aren't in the "read only" window.*	• Click on any link in the navigation panel to view specific student information • Click on a student name to go to the student profile • When you have finished reviewing student profile information, click the  button to close the window

EXCEED® RTI
Visual Instructional Grouping

Description	Action
Visual Instructional Grouping (VIG) allows users to analyze comparative assessment data to identify instructional supports for all students.	• Click the **Quicklink** button • Select **Visual Instructional Grouping** from the dropdown list
The **Screeners** window displays.  Screeners are collections of measures that are tracked for students. Screeners allow users to choose which pre-determined data they would like to analyze and how it is displayed using the color-coding..	• Click the **Screener** dropdown button • Select a Screener from the list
The **VIG** window displays. Next, you must identify the students for whom you would like to screen data. 	• Click Search • Enter a student name or student ID • Click **Search**

<table>
<tr><th>Description</th><th>Action</th></tr>
<tr><td>
A list of students displays in the student list panel.

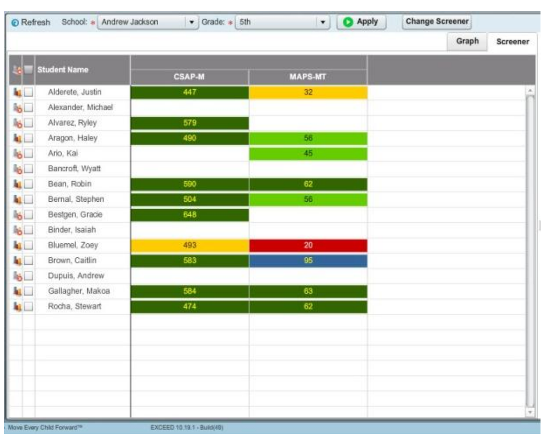


Only those students who are listed in the Student column on the left hand side of the screen will be available for viewing within Visual Instructional Grouping.

Next, you must select the school and grade level for the students you want to display.

</td><td>

- Click the **School** dropdown and select a school from the list
- Click the **Grade** dropdown and select a grade from the list
- Click **Apply**
- On the right , click the **Screener** tab
</td></tr>
<tr><td>
A color-coded table will appear with a column for each Measure available in the Screener.

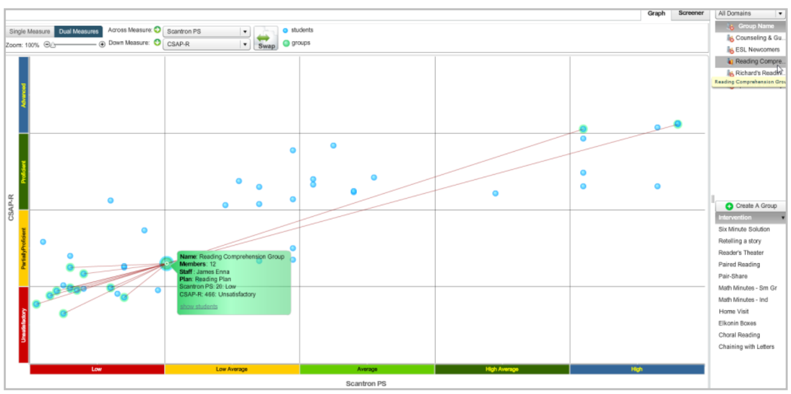


Each color represents a score range for that Measure as assigned by the District during the setup process.

Next, we will take a closer look at the Measures within the Screener.

</td><td>

- Click **Graph** tab
- Click the **Single Measure** button
- Click the **Down Measure** dropdown and choose a Measure
</td></tr>
</table>

Description	Action
A color-coded bar graph displays that Educators can use to guide instruction. Each bar on the graph represents an individual student. When hovering over each bar, the individual student's data will display for the measure, including name, score, date, and proficiency. Next, we will analyze student data using two Measures. 	• Click on the **Dual Measure** button • Choose a second Measure from the "Across Measure" dropdown menu.
Now, a scatterplot diagram displays containing the data for both selected Measures.  Each blue bubble on the scatterplot represents an individual student. By hovering over the bubble, you will see the student's Measure data, including name, scores, dates, and proficiency. This graph can be used to compare two measures that have been demonstrated to predict student outcomes.	• Hover over a student **Bubble** to view details • Click on a student **Bubble** to elect the student
You can add student to an existing group from the screener, single measure or dual measure graphs.	• Click each student bar or bubble you want add to a group • Hover over the group you want to add the students over until the **Add** icon appears • Click the Add icon and choose Add selected students to group • Specify a baseline for each student.