



Report Wrangling and Data Magic

May 15, 2026

This session explores key SpEd Forms reports, what data feeds them, and why directors might run them.

Participants will review examples, discuss practical uses for program decisions, and see how report data can be transformed into visual charts for easier analysis.

By the end of this session, participants will be able to:

- Identify which SpEd Forms reports align to common program and compliance needs.
- Explain practical reasons for running specific reports throughout the year.
- Use visual templates to turn report data into charts that support data review.

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The reports are only as good as the data entered.

Steps to cleaner data:

1. Use finalized or working data*
2. Consistently pull reports and cross reference.
3. Use report: SIS (imported) enrollment record discrepancies
 - a. SEES, environment and disability codes
 - b. Dates and end codes
4. Use Service Date Overlaps report
5. Use “Service reconciliation tool”
6. Remove *test/fake* students
7. Remove *inactive* students
8. Use consistent naming for Services List - Dropdown #13



The screenshot shows the top navigation bar of the SpEd Forms application. It includes the SpEd Forms logo, a 'Support' button, an 'Overview' button, and a 'Quit' button. Below these is a 'Go To...' dropdown menu and a link for 'Working with built-in reports'. A yellow banner indicates 'Login: 119 minutes'. The main navigation menu consists of buttons for 'Overview', 'Educators', 'Parents', 'Students', 'Reports' (which is highlighted), 'Organization', and 'Files'. Underneath, there are buttons for 'GenEd Forms', 'SpEd Forms' (highlighted), 'MA Forms', 'Custom', and 'Super Admin'. At the bottom of the navigation area, there are radio buttons for 'Searchable' (selected) and 'Quick'.

The screenshot displays the 'Record search > Admin reporting > Service date overlaps' page. A search form is visible with the following fields: 'First name', 'Last name', 'SSID', and 'LSID' (all text input fields); 'District of enrollment*' (dropdown menu, currently showing '0284: Wayzata Public Schools #284'); 'School of enrollment' (dropdown menu, currently showing '---Select---'); 'Resident district' (dropdown menu, currently showing '---Select---'); 'Grade' (dropdown menu, currently showing 'Ea...'); 'State aid category' (dropdown menu, currently showing '---Select---'); 'Start date' (calendar picker, currently showing '07/01/2024'); and 'End date' (calendar picker, currently showing '06/30/2025'). There is an 'Advanced mode' checkbox which is currently unchecked. A red arrow points from the 'Advanced mode' checkbox to a callout box. The callout box contains the text: '*New* There is an option to search for services using 'Advanced mode.' This will show all services for the student, including those that do not currently overlap any other services.'

SpEd Forms Search

AB

8

Login: 119 minutes

Educator reports > Educator reports

Searchable reports

Service date overlaps

Combined report

Teacher workload analysis

Team meetings in the next 90 days

Plan management

Services

Attendance data

Student history

My dashboard

SpEd dashboard

MA dashboard

504 dashboard

MTSS dashboard

Health dashboard

Find/request student

Add new student

Educator assessments

Educator reports

Educator setup

Record search > Educator reports > Service date overlaps

Download Search

Search ^

First name

Last name

SSID ?

LSID ?

District of enrollment*

School of enrollment

Resident district

Grade

State aid category

Start date

End date

9987: Demo District

9871: Demo Elementary

---Select---

EC

---Select---

07/01/2024

06/30/2025

Why?????

SpEd Forms Finalization checklist

- My dashboard
- SpEd dashboard
- MA dashboard
- 504 dashboard
- MTSS dashboard

Educator reports > Educator reports

- Finalization checklist
- Finalized form letters
- Form finalized dates

How to use Quick Reports

Prev. Page Forms Page 1 All Pages

Go To... Student, Minne aStudent

Quick report
Login: 119 minutes

Report name: Finalization checklist
Description: Lists last ER date, last ER finalized date, meeting date and last IEP finalized date for active students. Highlights finalization dates preceding document dates and overdue ERs/Plans.

Finalization_checklist.csv

All filtered records are included in the download.
Enter search terms before hiding to narrow download/print.

show/Hide Columns

<input checked="" type="checkbox"/>	District	<input checked="" type="checkbox"/>	School	<input checked="" type="checkbox"/>	Plan manager	<input checked="" type="checkbox"/>	MARSS ID	<input checked="" type="checkbox"/>	LSID	<input checked="" type="checkbox"/>	Student	<input checked="" type="checkbox"/>	Birth date	<input checked="" type="checkbox"/>	ER date	<input checked="" type="checkbox"/>	ER finalized date	<input checked="" type="checkbox"/>	ER date warning	<input checked="" type="checkbox"/>	ER overdue	<input checked="" type="checkbox"/>	Meeting date	<input checked="" type="checkbox"/>	Plan finalized	<input checked="" type="checkbox"/>	Plan date warning	<input checked="" type="checkbox"/>	Plan overdue	<input checked="" type="checkbox"/>	Three year eval not needed date
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showing 0 - 29 records of 29

How to Pull This Data:

- 1) Admin Reporting → Quick
- 2) Finalization Checklist
- 3) Save to File → Open CSV

Why Might You Use [This Template](#):

- Following due process timelines is important!
- Template includes a process tab
- Data could be pulled weekly by a Due Process Clerk in the district
- Due Process Memos are sent for late paperwork
 - [Process used at SCRED](#)

Minne aStudent > SpEd Forms > IEP > Services (Page 1) ▾

Special education and related services (primarily direct instruction and services)

^ Hybrid Service

Order

1

Service

Specialized Instruction: Reading



Specific service

---Select Option---



Field ID: 13, Field name:
SERVICES LIST

Services: SERVICES LIST (S... > Admin organization > Drop down list > Services: SERVICES LIST (13) Save Print

Show custom values ⓘ Show SpEd Forms values ⓘ Allow users to edit ⓘ + Add

Custom options

<p>Order</p> <input type="text" value="1"/>	<p>Value</p> <input type="text" value="Hybrid Service"/>	<p>Display</p> <input type="text" value="Hybrid Service"/>	<p><input type="checkbox"/> Deactivate this option</p> <p>- Delete</p>
<p>District ID (optional)</p> <input type="text" value="---Select district---"/>	<p>School ID (optional)</p> <input type="text" value="Select school"/>		

The screenshot displays the SpEd Forms interface. At the top, there are navigation tabs: Overview (red text), Educators, Students, Reports (blue text), Organization, and Files. Below these are secondary tabs: GenEd Forms, SpEd Forms (blue text), MA Forms, Custom, and Super Admin. A search bar is visible with the text 'evaluation' and a red minus icon. Below the search bar, there are radio buttons for 'Searchable' and 'Quick' (selected), and a blue link for 'Dashboard'. The search results are listed in a table with star icons on the left:

Search: evaluation
★ ECSE for screening/evaluation form outcomes
★ Evaluation summary (part B) 2021-22
★ Evaluation summary (part B) 2022-23
★ Evaluation summary (part B) 2023-24
★ Evaluation summary (part B) 2024-25
★ Evaluation summary (part B) 2025-26

- Helpful to track initials, reevaluations, DNQ, parent/school referral
- Demographic information
- Helps with ADSIS application data

How to Pull This Data:

- 1) Overview → Active Students → Click the number
- 2) Save to file
- 3) Open the CSV

Why Might You Use This Template:

- Track data regarding the number of students throughout the year
- Helpful to have “real-time” data on the students you are serving
- Instructions and tabs are can be modified easily to fit your district
- Data could be pulled by you, admin assistant, data coordinator, due process clerk, etc.
- Takes about 30 minutes per month maximum once you get used to the steps.


How to Pull This Data:

- 1) Admin Reporting → Quick
- 2) Progress report results for 2025-26 (or whatever year you want the data from)
- 3) Save to File

Why Might You Use [This Template](#):

- Monitor how students are doing on IEP goals
- Could pull report annually or after each progress reporting period
- Analyze data by district, building, case manager, type of goal, student

Searchable Quick
[Dashboard](#)

Search: 

★ Students 2 1/4 turning 3
★ Students 5 1/2 turning 6
★ Students 6 1/2 turning 7
★ Students turning 13 within the next year
★ Students turning 16 within the next year
★ Students turning 17 within the next year
★ Students turning 18 within the next year
★ Students turning 21 in 2021-22
★ Students turning 21 in 2022-23
★ Students turning 21 in 2023-24
★ Students turning 21 in 2024-25
★ Students turning 22 in 2023-24
★ Students turning 22 in 2024-25
★ Students turning 22 in 2025-26

Includes:

- District Student School Plan manager MARSS ID LSID
- Active Special education Age on ER date Birth date
- Primary disability Secondary disability Grade Gender
- ER date Eval time Instructional setting
- Hispanic American Native American or Alaska Native Black or African American
- Native Hawaiian or Pacific Islander Asian White or Caucasian Multiple races
- English learner
- Current plan type Status start date Initial Reeval **DNQ**
- **Team override source** Current MARSS status Assessment hours **Referral**

Admin dashboard > SpEd Forms

-Plan- Select distr Select schc

Active students

192

Active SpEd

165

Active 504 students

9

New referrals

3

Meetings in 30 days

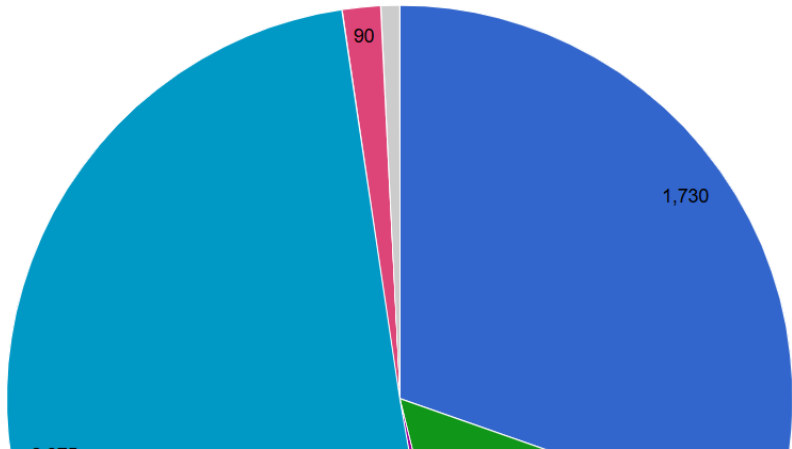
0

Evaluations in 60 days

1

Service minutes per week - summary chart

- Assistive technology
- Preschool Placement Prog...
- Specialized Instruction
- Specialized Instruction: Ma...
- Specialized Instruction: Reading
- Other



Service hours per week total

95

Services minutes per week - detailed table

[Download](#)

Service	Minutes
Assistive technology	1,730
Health services	0
Physical therapy	0
Preschool Placement Program	900
Specialized Instruction	60
Specialized Instruction: Mathematics	2,875
Specialized Instruction: Reading	90
Speech/Language: Articulation	40
Work Experience	4

Report name	Runs
MA Reconciliation Report	144774
AdminCombinedReport	91518
Services	86493
WorkloadAnalysis	77156
MA Claims in error	72741
Providers not logging 90 day	68786
Providers not logging 30 day	68783
Dashboard SpEd Services Data	41330
Dashboard SpEd Progress Data	40415
SummaryAttendanceAdmin	34423
Admin attendance detail	27871
EducatorCombinedReport	25315
reportName	22431
CaseloadAccess	19669
Workload	17564
MA Total Paid	16512
AdminServices	16151
SummaryAttendance	15528
Educator attendance detail	15193
AdminAttendanceDetail	12557
SpecialEducationServiceHours	11879
PreschoolServiceHours	9866
EducatorAttendanceDetail	9859

Parent access	7926
SummaryAttendanceEducator	7798
EducatorServices	7730
Plan not finalized 30 days after meeting date	7284
All student goals	5327
MALogSignaturesReport	4697
SIS (Imported) Enrollment Record Discrepancies SEI	4527
Case Management List Data	4472
combinedReport	4386
ServiceDateOverlaps	4108
MCA Accommodations (All)	3419
Login tracking report	3374
Consent Tracking	3320
ER Not Finalized 30 Days After ER Date	3017
MCA Accommodations with MTAS Exceptions w/narr	2467
ESY students including More Data Needed	2445
AccessLog	2357
MAEducatorServices	2351
Accommodations, modifications and supports from th	2339
ESY Services	2308
Due process timelines	2067
Finalization Checklist	2034
Educator List (no inactive users)	1961
MTAS Exceptions	1949

MAWorkloadAnalysis	1888
District Assessments with Accommodations	1840
IEP Plan Specifications - Para Service Minutes	1836
Parent/Guardian Email Addresses	1790
Exclusion Checker	1715
IEPs with Child Specific Para Support Checked	1684
Restrictive Procedures 2022-23	1679
Transportation checked Yes on services page (all par	1595
Speech/Communication Services	1594
Students that gained eligibility	1557
Parent Document Sharing	1532
IEP Plan Specifications - Due Dates	1440
Claims in error	1434
ACCESS ELL Students	1411
MADuplicateServicesReport	1403
Transportation Checked Yes - All History	1375
MCA Accommodations (All) from Finalized Plan Only	1319
OT Services	1302
MAProvidersNoServices	1286
Restrictive Procedures 2021-22	1217
ESY Students (only ESY checked Yes)	1210
IEP Plan Specifications - Service Minutes (active only)	1184
Plan not finalized 60 days after meeting date	1176
MA Logs by Provider 2022-23	1174

IEP Plan Specifications - Service Minutes	1038
District remote transfer contacts	1037
Progress Reports Finalized	1032
IEP Goals with how progress will be monitored	1024
Tuition Agreement List	1006
District Wide Assessments with Accommodations - A	999
Claims that denied	996
MA Logs by Provider 2023-24	984
Students that lost eligibility	975
Plan not finalized with days since meeting date	964
Restrictive procedures: physical holds 2024-25	931
MA logs by provider 2024-25	929
ERs Due in the next 90 days	907
Plan not finalized 45 days after meeting date	890
Service minutes by plan manager	889
District remote transfer contacts (Statewide)	888
District Admin Contacts (Statewide)	878
Educator List	876
Assessment Tracking - Active SpEd	853
ESY Determination	853
Missing Providers	837
Service Providers for each student	820
Restrictive procedures: physical holds 2024-25 stepw	810

