

Office of the Independent Monitor
Telephone Survey of Implementation of Welligent Web-based IEP System

Background

The Welligent web-based Individualized Education Plan (IEP) management system is a centralized program that manages and tracks students' IEPs. Each student with a disability must have an IEP under federal law. The IEP consolidates student information, lists the special education services and includes annual goals and objectives. Formerly, IEPs existed only as paper documents. The Welligent IEP system allows IEPs to be completed on the Internet and stores the information in the District's computer network so that they can be accessed by District personnel or by schools when students transfer between sites. Information from these records can then be extracted and consolidated into reports to provide evidence of progress toward the outcomes of the Modified Consent Decree (MCD). The Welligent IEP system has been used for approximately three years and continues to be implemented throughout the Los Angeles Unified School District (LAUSD). There are currently over 82,000 unduplicated IEPs in the Welligent system.

Yearly progress toward achieving the goals of the MCD and the benchmarks of the yearly Annual Plans depends on information derived from current annual, initial, addendum and other IEPs entered into the Welligent system. It is essential that school staff and other personnel are using the Welligent system for the purposes of drafting initial, addendum and annual IEPs throughout the course of the school year. Because the provision of accurate data to the Office of the Independent Monitor (OIM) is dependent on the successful implementation of the Welligent system at the school level, OIM has an obligation to assess the program's school level implementation. To this end, the OIM conducted a confidential telephone survey of administrators and other school personnel responsible for Welligent management since the 2003-2004 school year.

The primary goal of the survey was to gauge usage of the system by special education teachers in each school. It did not attempt to assess usage by related service or other staff. Other goals included gauging usage by administrative personnel to manage IEP caseloads and to identify problems that prevented or impeded full implementation or delayed or disrupted successful usage of the system to complete IEPs within the timelines required by law.

The 2003-2004 school year was the first full year of implementation of the Welligent system. During this year, 60% of the schools interviewed were fully implementing the Welligent IEP system, and 19% were not implementing the Welligent system at all. School's provided comments regarding problems encountered with the Welligent system and noted that the system was not user-friendly, particularly within the context of the IEP meeting. Respondents from middle and high schools with large special education enrollments tended to be more critical of the system and indicated more implementation problems than elementary schools. While school contacts were typically complimentary of Welligent's technical support, they were highly critical of the timeline for implementation of the system, the consistency and adequacy of the trainings (particularly

after changes to the software), and the response of the Division to persistent issues such as lack of hardware, connectivity, difficulty of home usage, and the user-friendliness of the software.

During the 2004-2005 school year, the OIM conducted the second year of the confidential Welligent survey. Questions were added on Designated Instructional Services (DIS) provider usage, classroom access by teachers, use of the management module (to schedule IEPs within the timelines required by state and federal special education laws) by school personnel, attempts to request assistance when encountering technical problems and sources of responses, types of assistance and methods of notification about changes in the system.

The 2004-2005 survey found that 88% of the schools interviewed were fully implementing the Welligent system. Furthermore, 89.5% of the users of the system answered that at least one staff member of the school uses the management module of Welligent to manage IEP caseloads. While implementation is high, 93.5% of the respondents that use the Welligent system indicated that they experienced technical problems. Regarding the type of difficulties experienced, the two most frequent problems the schools reported were 'Problems using the program' (40%) and 'Access to Welligent' (defined as ability to access the Welligent system over the internet) (20%). Approximately 43% of the schools that encountered problems stated that these difficulties impeded their ability to complete the IEP within the timelines required by law.

2005-2006 Welligent Study

Methodology

During the 2005-2006 school year, the OIM sought to survey all 722 schools in the District that enrolled special education students. This included all charter schools and continuation high schools however, it did not include non-public schools. Due to the District's considerable improvements in the implementation of the Welligent system, several questions were removed from the survey. This included questions regarding whether classrooms had access to the Welligent system, sources of technical assistance, and whether DIS providers were using the Welligent system.

Temporary personnel were hired to conduct the survey. These data collectors were trained to follow a survey protocol and enter survey data into a database (Attachment A) designed by the OIM staff. Throughout the two weeks, they were closely supervised to ensure consistency in their use of the protocol both individually and as a group.

The survey staff was instructed to begin by collecting contact information from the school for all administrators with responsibility for supervision of the special education program and was instructed to interview identified administrative staff. Interviewers were also instructed to type the responses of interviewees for the questions on the "types of problems you or your staff have encountered when using Welligent."

Schools were contacted up to 10 times in an effort to interview the appropriate personnel. When the study concluded, respondents at 659 of the schools had completed the survey.

Findings

Complete findings are presented in the attached report completed by Dr. Peter Goldschmidt of UCLA/CRESST (Attachment B). The analysis of findings found that 91% of the schools completed the survey. This allows for fairly strong confidence that complete survey results are representative of all respondents.

A total of 659 school administrators were interviewed, with almost all schools (99.5%) reporting using the Welligent IEP system, and most (87.4%) schools reporting using the Welligent management module to manage IEP caseloads. Although implementation of the Welligent is high, a considerable number of schools (72.6%) continue to experience problems when using the system. More importantly, most of the schools (66.9%) that reported problems with the system state that it has impeded the ability of their school to complete the IEPs within the timeline required by law. The most common problem mentioned by schools are those related to “updates” of the Welligent system. Schools indicate that the Welligent system is frequently updated and that there is a lack of notification and training on these updates.

Overall, based on results of this survey, it appears that the level of implementation of Welligent has increased substantially since the 2003-2004 school year. By all indicators there is a high level of usage of the system throughout schools in LAUSD. However, use of the system continues to be troubled by problems that may be having a negative impact on the ability of school staff to complete IEPs within the timelines required by law. The types of problems encountered are mostly associated with the addition of updates to the system. The District should consider selecting monthly intervals to upgrade the system to allow sufficient time to communicate these updates to schools prior to its implementation.

Interview

Hello, my name is ___ and I am calling from the Modified Consent Decree Office (*You can also use Chanda Smith Office or the Office of the Independent Monitor*).

If an Elementary School: What is the name of your APEIS? (*Assistant Principal Elementary Instructional Services*) [RECORD THE NAME IN CONTACT INFORMATION]

Can I please speak to him or her? [IF NO APEIS, ASK FOR AP IN CHARGE OF SPECIAL EDUCATION AND THEN, THE PRINCIPAL)

If Middle or High School: What is the name of your Assistant Principal in charge of Special Education? [RECORD THE NAME IN CONTACT INFORMATION] What is the name of your special education coordinator? [RECORD THE NAME/S IN THE CONTACT INFORMATION]

Can I speak to [NAME OF ASSISTANT PRINCIPAL OR IF UNAVAILABLE THE COORDINATOR]?

Hello, my name is ___ and I am calling from the Office of the Independent Monitor for the Modified Consent Decree [Chanda Smith Office]. We are conducting a brief confidential survey for school administrators. We would like to get some feedback from you on the implementation of Welligent in your school and your school's efforts to achieve the outcomes of the Modified Consent Decree and the goals of the Comprehensive Plan for Due Process. This information will be combined with survey results from schools throughout the District and be provided to the Independent Monitor, Division of Special Education and Information Technology Division for review. Your name and your school will not be identified. Do you have ten minutes now to talk with us about this?

IF YES: [CHECK THE CALLED BOX, ENTER NAME INTO NAME OF PERSON AND BEGIN SURVEY]

IF NO: When would be a good time to call back? [CHECK THE CALLED BOX AND RECORD INFORMATION IN CONTACT INFORMATION AREA]

1	Is your school using the Welligent IEP system?		If yes, check “Using Welligent” and go to question #3 If no, pick “No” and go to question #2
2	Why is your school not using the Welligent IEP system?		Refer to drop-down menus “Why Not”: Choose the comments that most closely correspond to the reasons cited by interviewee. Go to Question # 7
3	Is your school using the management module of Welligent to manage IEP caseloads?		If yes, pick “Yes”. If no, pick “No”
4	During this school year, have you or any other staff in your school encountered any problems when using the Welligent system?		If yes, pick “Yes”. If no, pick, “No”. If no, go to question #6.
5	Have these problems impeded the ability of your school to complete any IEPs within the timelines required by law?		If yes, pick “Yes” If no, pick, “No”
6	Has the Welligent system improved the ability of your school to complete IEPs within the timelines required by special education law?		I If yes, pick “Yes”. If no, pick, “No”
7	Do you have any additional comments or feedback re: Welligent that you would like to give us?		Enter narrative summary into the “General Comments” area

IF SURVEY IS COMPLETE, CHECK COMPLETED SURVEY BOX

Thank you very much for your participation in this survey. If you have additional questions, you may contact the Office of the Independent Monitor at (213) 241-6036. Goodbye. [Check “Completed Survey”]

Welligent Questionnaire Report

Pete Goldschmidt

The total number of schools that responded the Welligent Questionnaire is 772. These schools are located in 56 cities of 8 school districts, and serve students from all levels, from kindergarten to high school. For more information about the characteristics of these schools see appendix tables A to H.

The following tables present the frequencies associated with questions pertaining the use of the Welligent system. Some of these questions are disaggregated by school level, local district, and school calendar (separately).

The remainder of the report presents tables summarizing the use of the system (section I), problems using the system (section II), Due process questions (section III), and Annual plan questions (section IV).

I. Use of the Welligent System

Almost all the schools (99.5%) responded that they use the Welligent system and 74% of these schools indicated that they have been using the system for 2 to 3 years. In general a majority (87%) of schools report using the management module of Welligent to manage IEP caseloads, still a not insignificant 12% of the schools do not use it or do not know about it. The most salient result concerns the large number of schools that reported having problems when using the Welligent system. A total of 478 (73%) of the schools declared having problems with the system. From this group, 196 reported that these problems impeded their ability to complete any IEPs within the timelines required by law. We explored in more detail the characteristics of the schools that had difficulties with the Welligent system in tables 7 to 10.

Table 1

Q1. Is your school using the Welligent IEP system?	N	%
No	3	0.5
Yes	656	99.5
Total	659	100.0

Table 2

Q2. Why is your school not using the Welligent IEP system?	N	%
N/A	655	99.4
Other	4	0.6
Total	659	100.0

Table 3

Q3. How many years has your school been using the Welligent system?	N	%
Less than 1 Year	30	4.6
1 Year	45	6.8
2 Years	198	30.1
3 Years	288	43.7
4 or more Years	96	14.6
N/A	2	0.3
Total	659	100.0

Table 4

Q4. Is your school using the management module of Welligent to manage IEP caseloads?	N	%
No	36	5.5
Yes	575	87.4
Don't Know	46	7.0
N/A	1	0.2
Total	658	100.0

Table 5

Q5. Have you encountered any problems when using the Welligent?	N	%
No	173	26.3
Yes	478	72.6
Don't Know	6	0.9
N/A	1	0.2
Total	658	100.0

Table 6

Q6. Have these problems impeded the ability of your school to complete any IEPs within the timelines required by law?	N	%
No	293	44.5
Yes	196	29.7
Don't Know	10	1.5
N/A	160	24.3
Total	659	100.0

II. Problems Using the Welligent System

The disaggregated results indicate that there is some variability by school level¹. While in the categories “other elementary” and “high school” 95% and 81% respectively reported having problems with the system, in the elementary and middle school levels, 74% and 73% declared encountering difficulties. The levels with the least number of schools that encountered problems are “kindergarten”, “other high school” and “other”, with percentages around 64%, 56% and 44%. Furthermore, Table 9 suggests that those schools having problems with the system are likely to have larger enrollment than schools that do not encounter problems. However, this result needs further explorations.

Finally, Multi-track schools seem to have more problems using the Welligent system than one-track or continuous track schools.

Table 7
Problems using the Welligent system by Local District

Local District	Problems Using Welligent					Total
	No	Yes	Don't Know	N/A	%	
1	27.0%	72.2%	0.8%	0.0%	100%	115
2	29.4%	69.6%	1.2%	0.0%	100%	92
3	28.0%	71.0%	1.2%	0.0%	100%	93
4	19.4%	76.7%	2.8%	1.0%	100%	103
5	18.5%	81.5%	0.0%	0.0%	100%	81
6	30.2%	69.8%	0.0%	0.0%	100%	43
7	30.4%	69.6%	0.0%	0.0%	100%	56
8	32.0%	68.0%	0.0%	0.0%	100%	75
Total	26.3%	72.6%	0.1%	0.2%	100%	658

Table 8
Problems using the Welligent system by level

Level ¹	Problems Using Welligent					Total
	No	Yes	Don't Know	N/A	%	
Kindergarten	27.3%	63.6%	9.1%	0.0%	100%	11
Elementary	25.6%	74.2%	0.2%	0.0%	100%	434
Other Elementary	5.0%	95.0%	0.0%	0.0%	100%	20
Middle School	26.0%	72.6%	1.4%	0.0%	100%	73
High School	19.4%	80.7%	0.0%	0.0%	100%	62
Other High School	44.4%	55.6%	0.0%	0.0%	100%	9
Other	47.9%	43.8%	6.3%	2.1%	100%	48
Total	26.3%	72.6%	0.9%	0.2%	100%	657

¹ School level is based on configuration. Where: K = K; Elementary School = k-5 (410/454), 1-5, and k-6; Other Elementary schools = k-1, 2 etc. Middle School = 6-8 (79/84), 5-8, 7-9, and 6-9; High School = 9-12 (107/107); Other High School = 6-10, 11; Other = PK-6, k-8 (11/71), 7-12(15/71) 8-12, and other single or two grade combinations.

Table 9
Average enrollment by response categories in question 5

Problems Using the Welligent	General Enrollment		Special Education Enrollment	
	N Schools	Mean	N Schools	Mean
No	173	830.5	170	100.7
Yes	477	998.5	477	113.4
Don't Know	6	479.8	5	145.2
N/A	1	2366.0	1	60.0
Total	657		653	

Table 10
Percentage of schools with problems using the Welligent system by school calendar

School Calendar	N	With Problems Using Welligent	
	Schools	N Schools	%
1 TRK	475	299	63%
3 TRK	89	63	71%
4 TRK	120	90	75%
CONTIN	11	6	55%
OTHER	77	19	25%
Total	772	477	62%

In addition, we include in the appendix a table with the number of schools that reported having problems using the Welligent System, by city.

Q7. Feedbacks about the Welligent System

Respondents to the survey had a chance to provide comments about the Welligent system. The following represent an attempt to summarize those comments, complaints and suggestions. We looked for patterns of responses and for potential interesting feedback about the Welligent program². We found a lot of positive comments about Welligent but in this report we focus on constructive comments that can potentially improve the system. Therefore a summary of all the positive feedback is not included in this report.

The following table summarizes the most common comments about the Welligent system. The numbers represent the number of occasions that those comments were found in the text.

² Given that the comments are summarized and that we are looking for patterns, it is possible that a single unique comment may not be represented.

Among the most common problems are those related to “update problems” of the system. In general this category includes those problems related to not having the relevant information up to date in the system when completing IEPs. A frequent complaint is that when changes or updates are made to the system, schools are not always notified or trained on those new improvements. Even though, enhancements seem to be welcome by the majority of users, formal notification about the new changes are preferred. Otherwise, it causes confusions and a variety of problems. The second most common problem appears to be associated to the “locking procedure” of the system. This procedure, together with the restrictions of going from one page to another, complicate the administration, inputting, edition and printing of the data, and making the system look “too rigid” to many users.

In terms of other comments, overall users of the systems still encounter problems accessing the system, logging in, saving the data, and closing it. Additionally, many users complained about the system being or becoming too slow (under certain circumstances), with the system being too complex or not user friendly, with the system breaking down frequently, or with technical support not always being reachable when needed.

A major suggestion to facilitate the correct storage of the information is to include a “spell check”.

Table 1
Welligent most common or relevant comments

Most common Comments	N
Update problems	<u>62</u>
Dates are wrong or gives inaccurate dates	17
Discrepancies between Welligent and SIS	11
When students are transferred from another schools their information may not be up to date	4
When changes or updates are made to the program there is no notification or training. Causing extra time to troubleshoot the updates in the software. The message center should better convey changes like in fax or bulletin. This can prevent their inability to complete any IEPs	24
When student is suspended there is no notification within the system	1
Input data do not update fast into the system	2
When a student leaves school is difficult to remove him from the system	2
Sometimes Welligent has students in the system that are not enrolled in the school yet	1
Locking problems	<u>55</u>
Procedure to lock IEPs is cumbersome.	42
When system is locked information cannot be corrected until it is unlocked. Unlocking to correct takes too much time. Users wish there is an easy way to unlock.	13
Speed problems, slow, time consuming	49
Complicate. Would like to simplify it. Not user friendly. Difficult to navigate through.	32
Error messages. Editing problems	<u>28</u>

Does not provide a way to print out the list of errors	1
Too rigid in fixing mistakes. The system does not let you go back and make the change to correct an error or edit text. For something small that would be left off would be nice to correct without adding and amendment.	27
<hr/> System breaks down frequently	26
Printing problems	23
Not all printers support Welligent	14
What is showed on the screen is not necessary what gets printed	6
Reports do not fit in one page	1
Pages alignment/margins are off	2
<hr/> Access problems	21
In general system difficult to access	12
Problem with passwords (constantly having to change the password. Expire frequently)	9
<hr/> Closing problems. If things are not done in a specific order. Difficult to close IEP. Difficult to close without locking.	21
Spell check. Spell check should be included in the system	21
Log on/in/access problems	22
System difficult to access	18
The ST log is difficult to access	1
Difficult to access from home	3
<hr/> Problem going from one page to another	17
It will be helpful to navigate from page to page.	9
You cannot go from one page to another without returning to page listing.	1
You have to tog out and then log in.	2
Hard to see page numbers	1
You cannot open more than one page at a time.	4
<hr/> Technical support problems	14
Experience technical problems	3
Not easy to reach	3
Wait time to long	8
<hr/> Saving problems	19
Difficult saving information.	10
Some basic information such as name and address should be automatically saved in the system	2

Should notify of any changes made. Sometimes changes are made without telling you	7
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Loading problems. Technical constrains in inputting data	9
Memory problems in old computers. Problems with MAC computers	9
Glitches. There are glitches in the system/ quirks	7
Need more room in the narrative fields. The field boxes have limited space. Also field boxes where narrative information would fit do not print accordingly.	7
Information sometimes does not match the pull down menus or they are not adequate. Pull down menu limit the goals on Welligent the teachers can offer to their students	4
Should not be in sequential order. Not clear	3
About pre-school information not updated. Biggest defect is the glitch between pre-school and elementary school. “Biggest” issue has to do with IEPs not transferring from pre-school	3
Log out problems	3
There should be a back up system	3
<hr/>	
Problems with the track information of the child	7
System does not identify what track the child is on	2
RSP tracker is not designed for 4 track schools.	1
Has incorrect time lines when school year is a round calendar	1
Difficult to use the Welligent for planning a calendar to distribute. The system only allows due date information. Welligent does not allow sorting and printing a weeks or months schedule IEP’s to be distributed.	1
Like to have a calendar function within Welligent to send to all the participants in the IEP meetings.	2
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IEP Goals in the RSP. Cannot enter multiple goals for one student	2
Problem when amendments are added. They do not show up in Welligent	2
Private school “issues” haven’t been resolved. It marks them as out of compliance when they are not. Not possible to access IEPs of students attending non-public agencies. Need to call their school to get information.	2
Resource logs are not efficient, too time consuming or do not match with what you physical do	4
Sep up for elementary schools and not for high schools that work on block schedules	1
System does not allow to extend the timelines required	1
System does not allow sending out notification problems	1
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