

ACHIEVE Prior Written Notice Detailed Enhancement Guide

Early Access – Special Education – Draft Management – Notifications & Reporting

Purpose

This guide outlines how to use the updated Prior Written Notice (PWN) features in ACHIEVE for Early ACCESS and Special Education. It is a companion to the PWN Changes training and provides both an overview of the changes and the step-by-step directions for completing the updated fields and actions in ACHIEVE.

Overview of PWN Changes

Changes that apply to both Early ACCESS and Special Education include:

- [Removal of Date Fields](#)
- [Link This PWN To field](#) and related [Incomplete Data Report \(IDR\) logic](#)
- [Other Essential Information](#)
- [PWN buttons and draft management](#)
- [Updated Contact Person functionality](#)
- [Multiple draft PWNs and Draft PWN tracking](#)
- [Family Portal notification](#)
- [Unfinalized PWN Report](#)

Early ACCESS PWN changes also include a new Transition option as well as Date Decision Reached and Action-date documentation updates. Special Education changes include individual proposed/refused action fields, Action-Specific Decision-Making information and action accordions.

Removal of Manually-Entered Date Fields

The previous manually-entered PWN completion/notice date fields have been removed. When the user selects Complete, ACHIEVE stores the completion date and uses it as the Notice Date on the PWN output. This change removes redundant date fields and improves accuracy of the earliest date a completed Prior Written Notice could be provided to families.

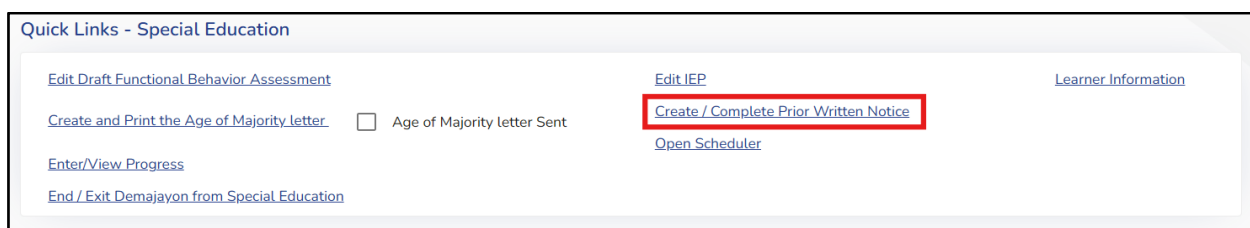
Link This PWN To Drop-Down Menu

The required *Link This PWN To* drop-down is located at the top of the PWN, is always displayed and identifies the process associated with the PWN.

- Select the process associated with the PWN.
- If *Other* is selected, *Describe Other* textbox appears and becomes a required field.
- Applicable IDR processes correspond to specific *Link This PWN To* options, including Initial/Modification/Annual Individual Family Service Plan (IFSP), Initial/Interim/Amendment IEP and Reevaluation.

How to Complete in ACHIEVE

Step 1: Open a PWN. (Note: PWNs may be initiated by selecting the *Create/Complete Prior Written Notice* quick link on a *Learner Management* page as shown below, by selecting the kebab icon next to a learner's name on *My Dashboard* or via buttons embedded throughout IFSP and IEP processes in ACHIEVE.)



Quick Links - Special Education

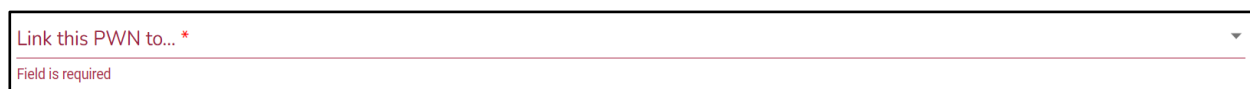
[Edit Draft Functional Behavior Assessment](#) [Edit IEP](#) [Learner Information](#)

[Create and Print the Age of Majority letter](#) ☐ Age of Majority letter Sent **[Create / Complete Prior Written Notice](#)**

[Enter/View Progress](#) [Open Scheduler](#)

[End / Exit Demajayon from Special Education](#)

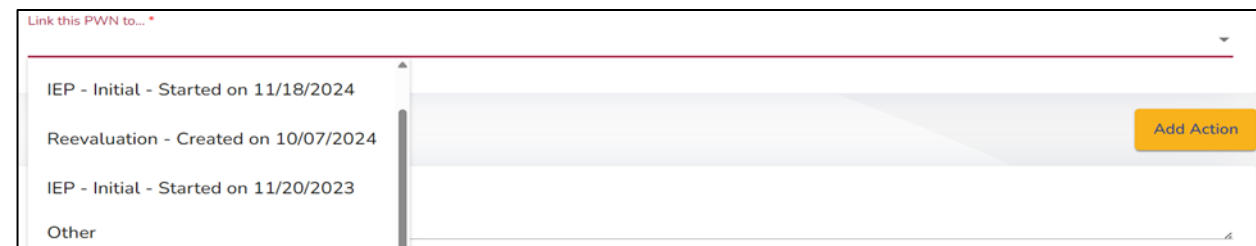
Step 2: At the top of the PWN, select the *Link this PWN to* drop-down menu.



Link this PWN to... *

Field is required

Step 3: Select the process associated with the PWN.



Link this PWN to... *

IEP - Initial - Started on 11/18/2024

Reevaluation - Created on 10/07/2024

IEP - Initial - Started on 11/20/2023

Other

Add Action

Step 4: If *Other* is selected, complete the required *Describe Other* textbox that appears.



Link this PWN to...

Other

Describe Other*

Using Resolve Button from the Incomplete Data Report

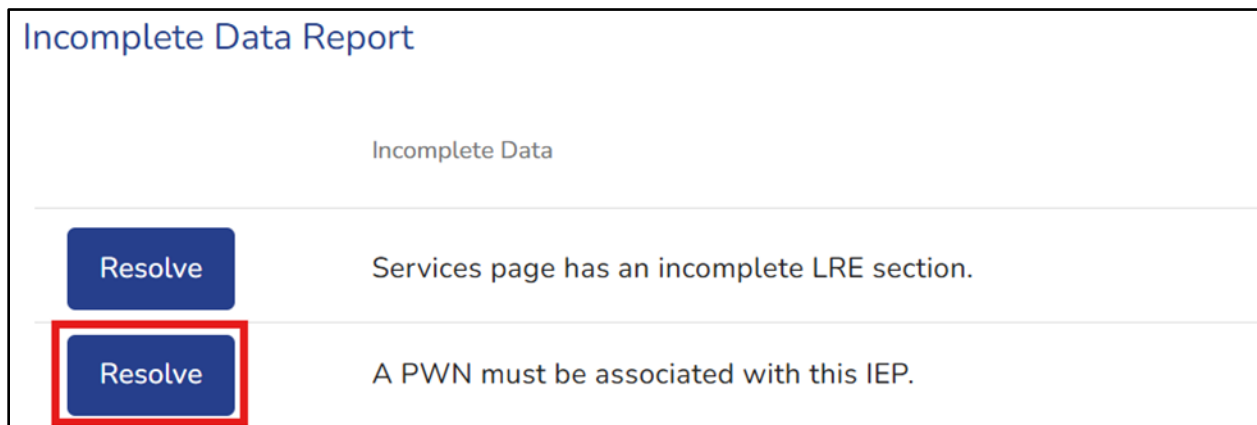
Individualized Family Service Plans (IFSPs) and Individualized Education Programs (IEPs) require completion of a Prior Written Notice, as denoted by the corresponding *Resolve* button on the Incomplete Data Report. Enhancements to IDR *Resolve* button logic streamline the process of linking a PWN to the correct process.

Incomplete Data Report Resolve Logic

- If no draft exists, the Resolve button creates a new PWN and the *Link This PWN To* value defaults to the corresponding ACHIEVE process.
- If exactly one draft is open and already linked to the corresponding process, ACHIEVE opens that draft.
- If multiple drafts exist or a draft is linked to a different process, selecting the *Resolve* button displays the Prior Written Notice modal.

How to Complete in ACHIEVE

Step 1: Select *Resolve* button for the applicable PWN IDR item.



The screenshot shows the 'Incomplete Data Report' interface. At the top, it says 'Incomplete Data'. Below this, there are two rows of data. Each row has a blue 'Resolve' button on the left and a text description on the right. The first row has the text 'Services page has an incomplete LRE section.' The second row has the text 'A PWN must be associated with this IEP.' The 'Resolve' button for the second row is highlighted with a red rectangular box.

Step 2: If no draft PWN exists, selecting the *Resolve* button creates a new PWN and the *Link This PWN To* value defaults to the corresponding IDR process.

Step 3: If exactly one draft PWN is has been started and is already linked to the corresponding IDR process, selecting the *Resolve* button opens that existing PWN.



The screenshot shows a dropdown menu titled 'Link this PWN to...'. The selected option is 'IEP - Initial Created on 02/10/2026'. There is a small downward arrow icon on the right side of the dropdown.

Step 4: If multiple draft PWNs exist or one draft has been started and is linked to a different ACHIEVE process, selecting the *Resolve* button displays the Prior Written Notice modal. Select *Create New* or open an existing draft by selecting a *Date Created* hyperlink.

Prior Written Notice

There are existing draft Prior Written Notices for this learner. Select an existing draft or create a new one.

Date Created	PWN Linked to...	Created By
9/9/2026	IEP - Initial - 04/05/2024	Adair Casey Provider Edit
9/9/2026	IEP - Initial - 04/18/2023	Adair Casey Provider Edit
Items per page: 3 1 – 2 of 2 < >		

Cancel

Create New

Other Essential Information

Prior Written Notices for Early ACCESS and Special Education learners now include an optional text field in which other essential information that has not been included elsewhere on the PWN may be documented.

Draft PWN Buttons and Actions

ACHIEVE includes updated controls for viewing, sharing, saving, completing and deleting draft PWNs.

View Draft

- The *Preview* button is now renamed *View Draft*.
- The *View Draft* button allows the user to review the PWN in PDF format while it is still in draft.
- Selecting the *View Draft* button does not finalize the draft PWN or store an incomplete copy of the draft PWN in the Documentation stepper.

Push to Portal

- A new *Push to Portal* button sends a copy of the draft PWN to the Family Portal for review before finalization.
- Selecting *Push to Portal* button does not finalize the draft PWN.
- Selecting *Push to Portal* button adds a copy of the draft PWN to the Documentation stepper. The incomplete (draft) PWN will be replaced with an updated PDF document when the PWN is finalized.

Delete PWN

- A new *Delete PWN* button allows the creator of a draft PWN as well as Data Leads based on location and Super Admins to delete draft PWNs as needed.
- A confirmation step is required before the draft is deleted.
- A rationale is required before the draft can be deleted.

How to Use View Draft

Step 1: Select the *View Draft* button to display and review PDF document of the draft PWN in a new window.



Step 2: Return to the draft PWN in ACHIEVE to complete all required fields. Viewing the draft does not finalize the draft or store an incomplete copy of the draft PWN in the Documentation stepper.

How to Use Push to Portal

Step 1: Select the *Push to Portal* button when the draft is ready for family review.



Step 2: Select Yes to generate a PDF document of the draft PWN in a new window and send a copy of the PDF document to the ACHIEVE Family Portal. Selecting the *Push to Portal* button does not finalize the draft PWN, however, a copy of the shared draft will be stored in the Documentation stepper of ACHIEVE.

Are you sure?

Clicking Yes will generate a new draft PDF that will be sent to the portal for the family to view.

No

Yes

Step 3: Return to the draft PWN in ACHIEVE to complete all required fields.

Step 4: When the PWN is finalized, the draft PWN will be replaced with an updated PDF document in the Documentation stepper of ACHIEVE and within the ACHIEVE Family Portal.

How to Use Delete PWN

Step 1: Select the *Delete PWN* to begin the deletion process. (Note: The *Delete PWN* button will only be visible to the creator of the PWN, Data Leads based on location and Super Admins.)

Delete PWN

 Push to Portal

View Draft

Save

Complete

Step 2: Enter the required deletion rationale.

Confirm Deletion

Clicking Delete will remove this draft PWN. To continue, please enter a rationale below.

Deletion Rationale*

Cancel

Delete

Step 3: Confirm the deletion to remove the draft. Once deleted, draft PWNs will no longer be visible or recoverable.

Contact Person Changes

Updated Contact Person functionality applies to both Early ACCESS and Special Education PWNs. Multiple contact persons may be selected.

Users may identify a contact person by:

- Selecting the checkbox next to the name of the PWN creator.
- Adding an Alternate Contact to identify a non-ACHIEVE user as the contact person.
- Selecting *Search for Team Members* to identify another ACHIEVE user as the contact person.

Alternate Contact

An Alternate Contact is entered manually and includes the contact's name, position, phone number and email address. It may be used along with other selected contacts.

Search for Team Members

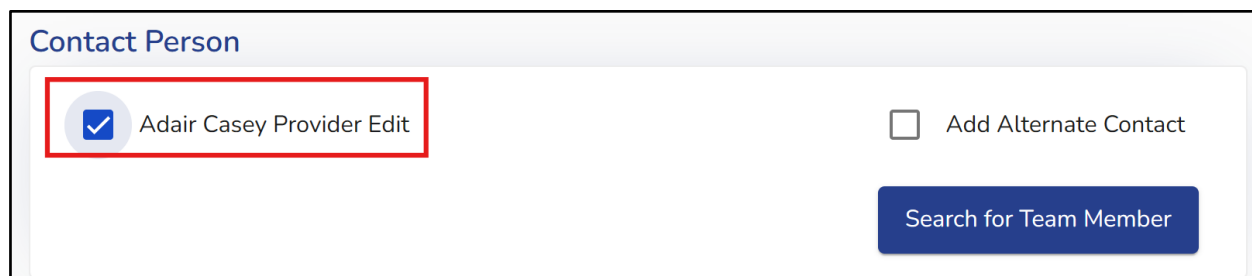
The *Search for Team Member* button allows another ACHIEVE user to be selected as a contact. Enter at least three characters of the contact's name, review the matching team members and select the appropriate individual.

Managing Contacts

Selected contacts display with name, phone number, email address and a *Remove* option. ACHIEVE profile information populates for selected team members. Removing a contact requires confirmation.

How to Complete in ACHIEVE

Step 1: To identify the PWN creator as the contact person, select the checkbox next to the creator's name.



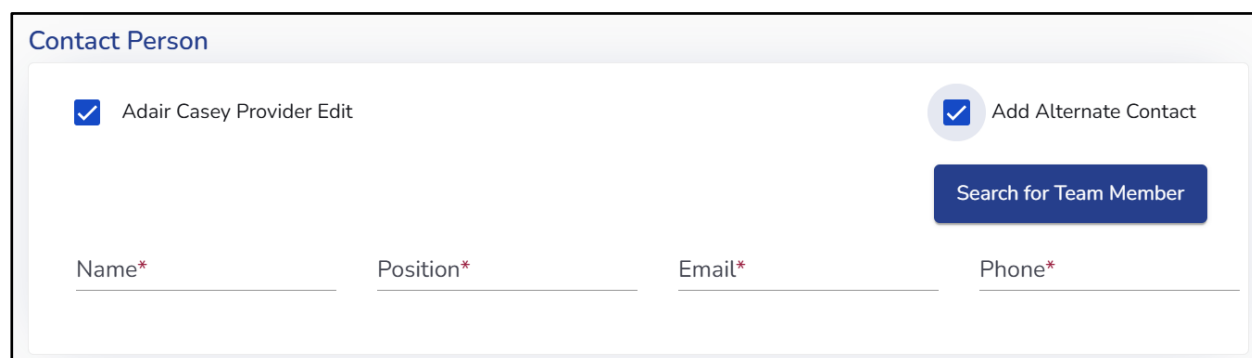
Contact Person

☒ Adair Casey Provider Edit

☐ Add Alternate Contact

Search for Team Member

Step 2: To identify an Alternate Contact as the contact person, select the *Add Alternate Contact* checkbox and enter the contact's name, position, email address and phone number.



Contact Person

☒ Adair Casey Provider Edit

☒ Add Alternate Contact

Search for Team Member

Name* Position* Email* Phone*

Step 3: To identify another ACHIEVE user as the contact person, select the *Search for Team Member* button, enter at least three characters of the person's name, review the matches and select the appropriate individual.

Add Team Members

Search

Filter by Job Title ▼

Step 4: Review the selected contacts. Use Remove when a contact needs to be removed; removal requires confirmation.

Early ACCESS PWN Changes

Transition Option

A new *Transition* checkbox is now available under “The Prior Written Notice is related to (select all that apply)” section of Early ACCESS PWNs. This option may be selected with other applicable options.

Date Decision Reached

- New required field on Early ACCESS PWNs.
- Documents when the decision was reached.
- Cannot be a future date.
- The decision date and implementation date serve different purposes.

Adding Another Date

When Add Another Date is selected, the new removable action-date section includes Action. This action will be implemented on and Date Decision Reached. Each added section has a red X for removal. Add Another Date remains disabled until required fields in the newest section are complete.

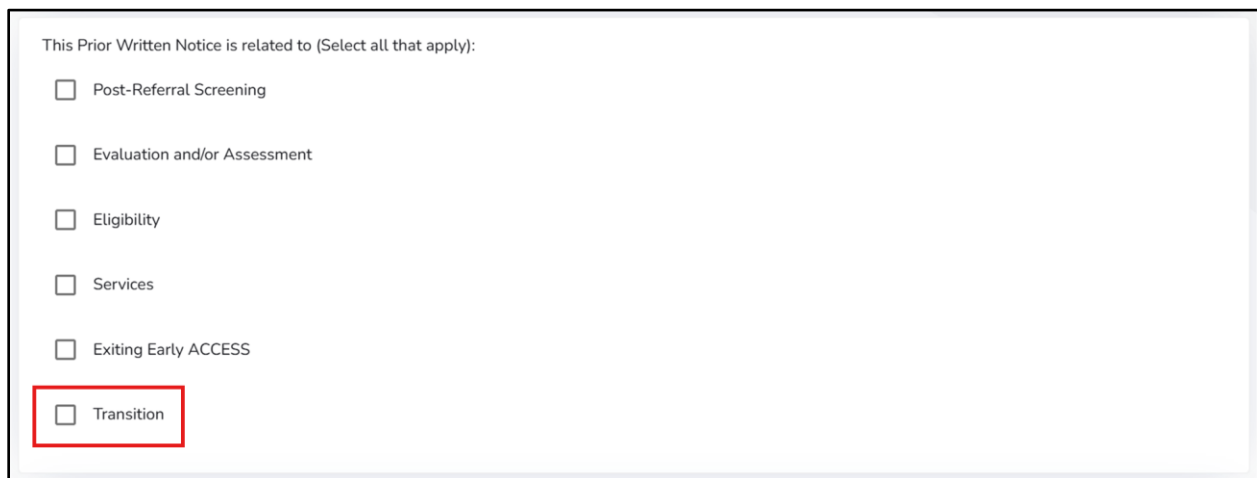
How to complete the Transition Option

Step 1: Locate the “The Prior Written Notice is related to (select all that apply)” section of the PWN.



The screenshot shows a form with a dropdown menu labeled "Link this PWN to..." and a section below it titled "This Prior Written Notice is related to (Select all that apply):". The section title is highlighted with a red rectangular box.

Step 2: Select *Transition* when the PWN is related to transition from Early ACCESS services.



The screenshot shows a list of options for the section "This Prior Written Notice is related to (Select all that apply):". The options are: Post-Referral Screening, Evaluation and/or Assessment, Eligibility, Services, Exiting Early ACCESS, and Transition. The "Transition" option is highlighted with a red rectangular box.

Step 3: Select any other applicable options as needed.

How to Complete Date Decision Reached

Step 1: Enter the date the decision was reached.

Date Decision Reached*		This action will be implemented on*		Add Another Date

Step 2: Enter the date the action will be implemented.

Date Decision Reached*		This action will be implemented on*		Add Another Date

How to Add Another Date

Step 1: Select Add Another Date.

Date Decision Reached*		This action will be implemented on*		Add Another Date

Step 2: Define the proposed action.

Action*	This action will be implemented on		Date Decision Reached		×

Step 3: Enter dates for *This action will be implemented on* and *Date Decision Reached* fields.

Action*	This action will be implemented on		Date Decision Reached		×

Step 4: To remove an added action-date section, select the red X.

Action Action	This action will be implemented on 9/7/2026		Date Decision Reached 9/6/2026		×
Action Action	This action will be implemented on 9/8/2026		Date Decision Reached 9/7/2026		×

Special Education: Proposed and Refused Action

Special Education PWNs now document each proposed or refused action separately, connecting the decision-making information and dates to each specific action.

For every action, identify and document:

- Whether the agency is Proposing or Refusing
- Date Decision Reached
- The following action
- Sources of Information
- Other options considered and why those options were rejected
- When Proposing is selected, the implementation date is also required
- At least one proposed or refused action must be saved before the PWN can be completed

Other Relevant Factors

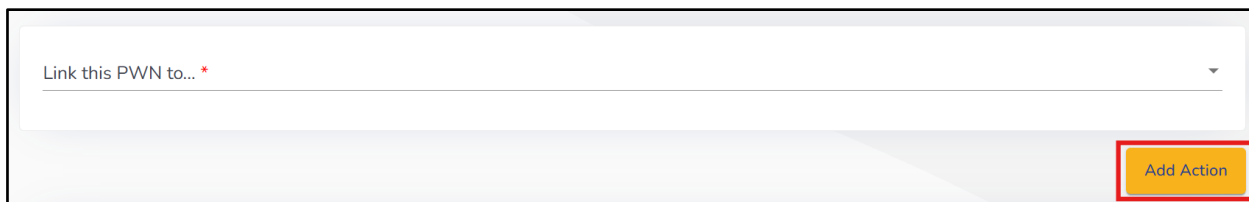
ACHIEVE asks whether other factors are relevant to the proposed or refused action. If Yes is selected, a required description textbox of the relevant factors must be completed.

Saving and Managing Actions

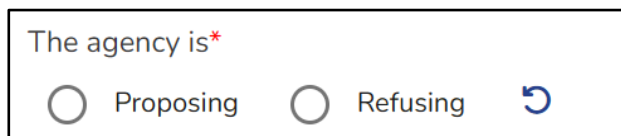
- The *Save & Add Another* button saves the current proposed or refused action and opens a new action.
- The *Save & Close* button saves the current proposed or refused action and returns to the action list.
- Each saved action appears in its own accordion, is collapsed by default and may be expanded to review, revise or remove information.
- A single PWN may include multiple actions, including both proposed and refused actions.

How to Add an Action in ACHIEVE

Step 1: Select *Add Action* button.

A screenshot of a web form. At the top, there is a dropdown menu with the placeholder text "Link this PWN to..." and a red asterisk. Below the dropdown is a large, light gray rectangular area. In the bottom right corner of this area, there is a yellow button with the text "Add Action" in black. The button is highlighted with a red rectangular border.

Step 2: Select whether the agency is *Proposing* or *Refusing* the action.

A screenshot of a form section titled "The agency is*" in gray text. Below the title are two radio button options: "Proposing" and "Refusing", both in gray text. To the right of these options is a blue circular refresh icon.

Step 3: Enter *Date Decision Reached*. This field is required and cannot be a future date.

A screenshot of a date input field. The field is a wide, light gray rectangle. On the left side, the text "Date Decision Reached*" is displayed in gray. On the right side, there is a small gray calendar icon.

Step 4: If *Proposing* is selected, enter the date *This action will be implemented on*.

Date Decision Reached*		This action will be implemented on*	
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Step 5: Complete the required textbox to describe the proposed or refused action.

The following action*

Field is required

Step 6: Complete the required textbox to identify source(s) of information used to propose or refuse action.

Based on the following source(s) of information*

Step 7: Complete the required textbox to describe other options the agency considered and the reasons why those options were rejected.

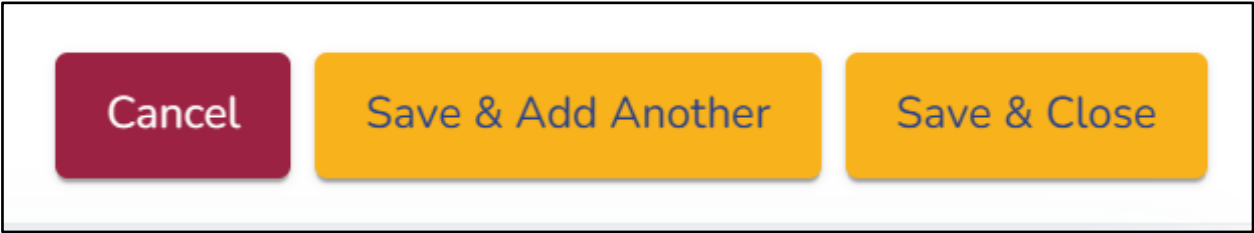
Other options the agency considered and the reasons why those options were rejected*

Step 8: Identify whether there are other relevant factors for the proposed or refused action. If Yes is selected, complete the required description textbox of the relevant factors.

Are there any other factors relevant to the agency's proposed action?*

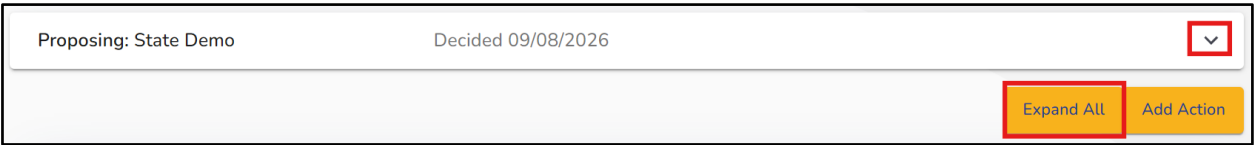
☐ Yes ☐ No 

Step 9: Select *Save and Add Another* to save the current proposed or refused action and open a new action or select *Save and Close* to save the current proposed or refused action and return to the action list.



How to Manage Saved Action

Step 1: Expand an action accordion to review the saved information.



Step 2: Select *Edit* button to make changes to the action.



Step 3: Use *Expand All* button to open all saves action accordions or *Collapse All* button to close them.



Step 4: Select *Add Action* to document another proposed or refused action.



Step 5: When authorized, select *Remove* and confirm removal of proposed or refused action.



Multiple Draft PWNs and Draft Tracking

When a Draft Already Exists

When creating a PWN, a Prior Written Notice pop-up modal is displayed if a learner already has one or more draft PWNs in progress. The modal identifies existing drafts by Date Created, PWN Linked to and Created By. Users can open an existing draft or create a new PWN as appropriate.

Finalize Draft PWN To Do

- When a PWN remains unfinished for 5 or more days, ACHIEVE generates a To Do that appears on *My Dashboard* for the user who created the PWN.
- The To Do is titled with “Finalize Draft PWN.”
- The To Do identifies the draft using the PWN Linked to value and Date Created.
- The To Do will display a recommended due date of 9 days after the PWN was created.
- Selecting the To Do’s *Resolve* button opens the associated PWN in progress.
- The To Do is removed from *My Dashboard* when the PWN is finalized/completed, the draft is deleted or the learner ends or exits Early ACCESS or special education services.

How to Work with an Existing Draft

Step 1: Review the Prior Written Notice pop-up modal.

Prior Written Notice

There are existing draft Prior Written Notices for this learner. Select an existing draft or create a new one.

Date Created	PWN Linked to...	Created By
8/25/2026	IEP - Interim - 08/25/2026	Adair Casey Provider Edit
9/3/2026	Testing	Adair Casey Provider Edit
9/8/2026	testing other	Adair Casey Provider Edit

Items per page: 3 1 – 3 of 5 < >

Cancel **Create New**

Step 2: Use *Date Created* to identify the draft; select the date hyperlink to open an existing draft.

Date Created	PWN Linked to...	Created By
8/25/2026	IEP - Interim - 08/25/2026	Adair Casey Provider Edit

Step 3: Review PWN Linked to identify the associated Link PWN TO process.

Date Created	PWN Linked to...	Created By
8/25/2026	IEP - Interim - 08/25/2026	Adair Casey Provider Edit

Step 4: Review Created By to identify who created the draft.

Date Created	PWN Linked to...	Created By
8/25/2026	IEP - Interim - 08/25/2026	Adair Casey Provider Edit

Step 5: Select Create New when a new PWN is needed.

Cancel

Create New

How to Use the Draft PWN To Do

Step 1: Open the Finalize Draft PWN To Do.

My To Do List (26)

Step 2: Use PWN Linked to and Date Created to identify the draft.

My To Do List (26)

Filter: ☒ All Items ☐ System-Generated Items Only ☐ User-Added Items Only

Item	Learner	Days Left	Due Date	Actions
Finalize Draft PWN (created on 06/29/2026)		-63	07/08/2026	Resolve

Step 3: Select Resolve to open the PWN in progress.

My To Do List (26)

Filter: ☒ All Items ☐ System-Generated Items Only ☐ User-Added Items Only

Item	Learner	Days Left	Due Date	Actions
Finalize Draft PWN (created on 06/29/2026)		-63	07/08/2026	Resolve

Step 4: Complete/finalize the PWN or delete the draft. The To Do is also resolved if the learner ends/exits.

Family Portal, Output and Reporting

Family Portal Notification

When a draft PWN is pushed to the portal, eligible family contacts receive an email notification with the subject “New Draft Document is Available in Your Portal Account to Review”. When a PWN is completed, eligible family contacts receive an email notification with the subject “New Document is Available in Your Portal Account to Review.” These messages inform the family that a new document is available and directs them to log in to the portal to access the document.

Unfinalized PWN Report

ACHIEVE *Reporting* functionality includes a new *Unfinalized PWN Report* that identifies learners with an unfinalized PWN that has been open for 10 or more days. This report can be found in both Early ACCESS and Special Education canned report sections of ACHIEVE.

Supporting Timely Completion

Finalize Draft PWN To Do	Unfinalized PWN Report
Appears at 5+ Days	Identifies PWNs open 10+ Days
Assigned to the PWN creator	New Canned report
Opens the in-progress PWN	Identifies learners with an unfinalized PWN

Quick Reference: What Applies Where?

Changes	Early ACCESS	Special Education
Link PWN To/Other	Yes	Yes
PWN buttons and draft management	Yes	Yes
Contact Person	Yes	Yes
Multiple PWNs/draft tracking	Yes	Yes
Family Portal notifications/output/reporting	Yes	Yes
Transition option	Yes	No
Date Decision Reached/action-date updates	Yes	Different action-specific workflow
Individual proposed/refused action	No	Yes
Action-specific decision-making/accordions	No	Yes

Key Takeaways

- Link the PWN to the correct process to resolve Incomplete Data Requirements.
- Document Special Education proposed/refused action individually and connect the decision-making information to each action.
- Use draft-management tools intentionally: View Draft, Push to Portal, Save, Complete and Delete PWN have different effects.
- Monitor unfinished draft through the Finalized Draft PWN To Do and the Unfinalized PWN Report.
- Remember that finalization triggers the family portal notification for eligible family contacts.