

Oklahoma will be moving to a new Special Education data and eligibility/IEP Process system beginning July 1, 2015. The new contract vendor will be Public Consulting Group (PCG). The program is entitled OK EdPlan™. The following questions will assist districts during the transition to the new online IEP system.

### OVERVIEW

#### **1. Will this program replace SEAS? Are all districts required to participate in this program?**

Yes. Districts are not required to use the EdPlan™ system; however, they are required to submit all state and federal reporting data through this system. This would require districts to duplicate efforts if not using EdPlan™ as state and federal reporting data is collected when IEPs are created in the EdPlan™ system. The state will only fund the EdPlan™ system for district use.

#### **2. Are there district costs?**

No. The EdPlan™ system for IEP, Eligibility, 504, ISP, and IFSP will be provided to all districts at no cost. Districts do have the option to purchase additional modules from PCG within the EdPlan™ system.

If a district wishes to add a district specific form to EdPlan™, not universal throughout the state, with prepopulated student demographic and other relevant information already collected in the database, then there will be an added cost. However, districts can load district specific forms for printing purposes to the main menu page of EdPlan™ at no additional charge.

#### **3. Is there anything on the district end that needs to be done before July 1?**

Yes. OSDE will be communicating to districts each month regarding the data integration process and will notify districts if they need to do. Districts should ensure they have a hard copy and/or PDF of each child's latest evaluation and most current IEP. The current state contract with SEAS expires on June 30, 2015 and access will cease.

#### **4. Is the previous/inactive information on IEP's/MEEGS on SEAS going to be transferred to this new program?**

PCG continues to work with the Oklahoma State Department of Education-Special Education Services (OSDE-SES) requesting the data and a timeline for integration from SEAS. PCG will import any data and forms SEAS provides in the appropriate format into the EdPlan™ system. It is recommended that districts have a hard copy/PDF of each student's current eligibility and most recent IEP.

**5. When will districts be able to view and/or work on a test site?**

A review team of local education agencies (LEAs) were selected to access EdPlan™ to explore user features and provide feedback to the OSDE. The team consisted of LEAs represented different regional areas across the state and various student population sizes.

**6. Is SoonerStart going to be required to use this as well as public school?**

The SoonerStart Program will be brought into the system once the base system is up and running for IEP, ISP, 504, and Eligibility. Implementation for Sooner Start will be determined at a later date.

**7. When will training on EdPlan™ begin? How will we be notified?**

Administrator trainings will be available beginning in July. Once the District Administrators have been trained, log-in credentials for all EdPlan™ users in their district will be provided. The training approach is currently being determined. More information on statewide training will be available in May 2015. An overview of the system will be provided at the EngageOK (previously Vision 2020) conference. EngageOK will be July 7-9, 2015 at the Cox Convention Center in OKC.

**8. Who handles users and roles?**

The OSDE-SES will define a set of available user types with various permissions in the system. The district will assign users based on their roles in the district to the user type. There will be a user role defined that will accommodate a position that holds multiple roles. Access to student data is based off of user type permissions; therefore if you have access to students in multiple schools or district your log in will be reflective of your role. The intent is to have one log-in per user.

Users will have the ability to see the students that are assigned to them via the “team page”. If a user is assigned to the student's team (IEP, 504, etc.) they will be able to identify others who have access to that student's information. User actions are also captured in the system per student and can be reviewed by personnel with system permission and access.

**9. How will staff get loaded into the system? (Do users have to be manually set up or will there be a nightly process to import staff from a human resource system?)**

PCG is discussing the most efficient way to get user data into the system from the district human resource system or accreditation system at the OSDE level. They can be manually added if needed but the plan is to capture users through an import.

## **10. Is there a hard copy User Manual?**

No. The user manual is an electronic document that will be located on the Main Menu page of EdPlan™ beginning July 1, 2015. Users will be able to download and print the document free of charge.

## **11. What are the browser capability and plugin requirements?**

EdPlan™ is supported by all browsers. Any browser that you are familiar with will work.

## **12. Who can make changes to the demographic data?**

All student data will be imported nightly from the WAVE system and there will be no need for manual entry. However, there may be emergency situations where manual entry is needed. In order to minimize the risk of creating duplicates in the system only a few select users at a district will have access to manually enter student demographic data within the EdPlan™ system.

PCG will setup a secure File Transfer Protocol (FTP) for each district. These FTP sites can be used to transfer data files created by EdPlan™ and posted nightly to your servers to be imported into your district's student information system (SIS). There are multiple standard exports available through the state contract and custom exports can be created for a small fee.

## **ELIGIBILITY**

### **13. Will we be able to pull information from the WAVE into our eligibility documents? Demographic information, etc.?**

Yes. Data will be entered once either via the integration with the WAVE or by the end user if that data is not available in the WAVE system. Once entered, the information will pull into all appropriate documents the end user will be creating for that student's file.

### **14. How much of the student information is being loaded directly from the WAVE to EdPlan™?**

All available data in the WAVE system relevant to EdPlan™ student plan management will be automatically loaded.

### **15. Is EdPlan™ going to be able to populate WAVE required fields for IEP students?**

Yes.

**16. How can I change a general education student to a special education student?**

Users are able to search for a general education student to begin the referral process and data review. Once the evaluation and eligibility process is completed for a general education student in EdPlan™, they will be listed as a special education student if they are found eligible.

**17. Will there be an inactive/active feature when the student moves from district to district?**

Yes. Information uploaded to EdPlan™ follows the student based on his/her state test identification number. When a student leaves a district, they will become inactive in that district and active in the receiving district. Students historical, “electronic file cabinet” will transfer. Users with appropriate levels of access will be able to view and reactivate students should they return to the district at a later time and request the records transfer from the sending district. Complete instructions on the transfer of records process will be communicated to the districts during the regional trainings.

When a student enrolls in a district, their information is received in the WAVE system from the district student information system. The WAVE system will adjust the enrollment record for this student to reflect the new district's information and will not require manually entering the data into the WAVE system. There are emergency situations where manual entry is needed. In order to minimize the risk of creating duplicates in the system only a few select users at a district will have access to manually enter student demographic data within the EdPlan™ system.

**18. Will I be able to access a student's records from other states using EdPlan™?**

No. Currently this functionality is not available; however, paper records can be scanned and uploaded into the system to provide a complete historic file.

**19. Is there a way to build reports for psychological educational testing?**

The EdPlan™ system will contain a set of pre-programmed reports available to users. If there are documents that are needed specifically by a district, that district would need to discuss these needs directly with PCG so they may build those for the district. These district specific reports; however, are not included in system the state is providing at no cost. BUT any outside written reports can be uploaded and stored in the student's electronic record for historical purposes.

**IEP****20. Will districts be able to develop their own form packets?**

No. EdPlan™ is student focused process based tool that guides users through a process. Users will enter the data into the interface through the process and that data will be used to create any documents (forms) as needed for the student record. EdPlan™ is designed to guide a user through the process whether for an annual IEP or eligibility. There will not be a need to create packets in the system but we understand the importance of helping teachers understand which documents need to be created for a student in a particular process.

**21. Will the IEP forms look like what we have now?**

The IEP form is currently in the process of being designed. The OSDE and PCG team are trying to be mindful of changes that are intuitive for the users, but also determine improvements that will make the IEP/eligibility process smooth.

**22. Can the pages of the IEP be ordered the way that the district wants them sorted in the confidential folder?**

No. EdPlan™ is process driven and will follow a process that will order the pages appropriately and consistently for every completed IEP.

**23. What information can be extracted from the EdPlan™ system?**

The EdPlan™ system provides a variety of reports that can be accessed by the end user based on their role within the school district. IEP and Accommodation information is available through current reports within the system and will be able to be extracted in CSV or PDF formats.

**24. Where is the record of parent contact information kept/located to see all records at once?**

Users will be able to enter parent contact information on the “Contacts Page” on the student’s “Personal Menu” within the system. All contacts will be viewable there based on user access to student information. The user will be able to enter any date needed when creating a parent contact.

**25. Does the calendar feature allow other users to see when you have schedule meetings?**

Only users that are authorized by the district to view other user's calendars will be allowed the functionality to see what is scheduled. There is a “My Calendar” feature that will be part of the system that will allow users to schedule meetings, e-mail participants, etc. Additionally, the

EdPlan™ System will allow users to invite other participants to the meetings through the creation of an invitation document or creation of an appointment on their own calendar for other meeting types. You can email appointments to yourself in Google or Outlook from the system. This does not replace the Notification of Meeting document that will be generated in the EdPlan™ System.

**26. Can you upload documents into the system (i.e., evaluation reports, medical documentation, etc.)?**

Yes, documents can be uploaded into EdPlan™ through the “Paperclip” feature that will be accessible at the student document level.

**27. Is there an archiving feature?**

No. Because EdPlan™ automatically saves the documents that are created within the system there will be no need to manually archive documents. All current and past documents will be saved within the student's electronic file cabinet and available for viewing or printing at any time. Documents created within or uploaded into the system will also transfer with the student from school to school or district to district.

Any document that is created for a student will always remain with that student within the student's electronic filing cabinet. Additionally, any document that is uploaded electronically to that student's file will be kept with that student's record.

**28. Is there a way to save narratives (i.e., scripting that is used in the IEP several times)?**

If there is information that is replicated through the IEP process for the same purpose, that information will appear in the fields once entered. If the user needs to "copy and paste" information during the initial process, that is also allowed as well as copying data from an external document and pasting it within the process.

**29. Is spell check available?**

Yes. Spell check is included in all the comment boxes in EdPlan™ however the user must click to utilize this functionality.

**30. Does the information from the present levels page transfer to MEEGS for re-evaluation purposes?**

Yes.

**31. Will we be able to update existing information from a previous IEP?**

There will be fields in the system that remain populated once the final IEP is generated and there will be fields that are required to be addressed with each meeting. Those fields that can remain will be editable by the end user.

**32. Are the Oklahoma Standards going to be available in a goal bank?**

Yes. We are working with the OSDE to define the goal bank. You will be able to add goals from lists that are defined by the State. Additionally, you can create your own original custom goals within the system and then save those to your personal goal bank for use in the future. Personal goal banks can be shared across teams who have access to those students' goals. If you have goals you currently used you are encouraged to copy and paste the language so that you have it to use when accessing EdPlan.

**33. Can you print just individual pages, such as accommodations pages?**

Yes. All documents are saved in the student's file as pdf versions. You would be able to print any page as necessary within that document. Printing from "Show Section" is also available on each page within the IEP. You will also be able to print a draft IEP from the system. The draft document will be watermarked with "Draft."

Draft student specific documents can be generated in advance of the meeting and can be used in the event the computer or system goes down on the day of the meeting. Each district will determine how to handle emergency situations when the user cannot access the system in order to print a blank document. Districts can post blank forms to the main menu to print and have on file in the event of an emergency.

**35. Is the document "resaved" if any changes are made during the meeting and how can we get to the page to make those changes?**

The user will be able to create a draft version of the IEP document to take to the IEP meeting. The user can access this draft during the meeting on a computer, tablet, smartphone in order to make changes during the meeting or can write on the paper draft and come back to the computer and make changes within the IEP process. However, the user must click the "save" button before leaving the page they are working on. Once these changes and additions are made within the process, the user will create a final version of the document that will be saved in the student's electronic file cabinet and generate data for reporting.

**36. Will IEP team members be able to electronically sign the IEP at the meeting?**

No. EdPlan™ does not currently allow for online signatures. Signature documents can be uploaded into the EdPlan™ system for electronic storage.

**ANNOUNCEMENTS****37. Will the new program alert us by email when things are due ahead of time?**

Yes, visual symbols will be in the system that will provide an indication that something will be due within a specified period of time once the user has logged into their “Dashboard.” E-mail alerts can also be set within the system.

**38. Is there a way to provide announcements to staff specific to my district?**

As a director, you will be able to post messages on the “Main Menu” page which will then be displayed to all users in the district. Directors will also have the functionality to send mass e-mails to the entire districts or sub-sets of users within the district. Currently the “Message Board” is a secure communication from State personnel and PCG to district personnel.

**39. Is there a user forum?**

There will be monthly to quarterly (as appropriate through the life of the contract) district administrator calls that will be facilitated by OSDE and PCG once the system is live in all districts.

**40. Can the system be set up to send/receive emails at our school email address without having to check EdPlan™ messages daily?**

Not at this time.

**DATA/REPORTING****41. How will the State Child Count and Data Reports be handled?**

Once users have finalized the student's Eligibility and IEP information, the Child Count reports can be pulled from the district level or state, aggregated level. The EdPlan™ system will contain a set of customizable reports based on set data elements. If there are documents or reports that are still needed specifically by a district, the district would need to discuss these needs directly with PCG so they may build those for the district. These district specific reports or documents; however, are not included in system the state is providing at no cost.

**MEDICAID**

**42. Do you have any solutions for Medicaid billing?**

Yes. PCG is experienced in Medicaid reimbursement. Medicaid Administrators will have access to Medicaid billing information. If you would like more information on this subject please email Alicia Stewart with PCG at [astewart@pcgus.com](mailto:astewart@pcgus.com).