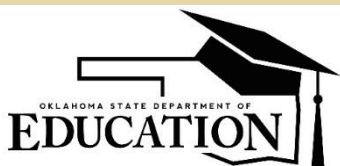




# OK EdPlan™

## Transfer Processes

Revised August 10, 2015



PCG | *Education*

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## OK EdPlan™ - Transfer Processes

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## OK EdPlan™ - Transfer Processes

### TRANSFER PROCESSES

#### Within YOUR OWN School District

If a student transfers within your school district from one school to another school the import from the WAVE will update this information as soon as those validation checks have been met and the enrollment record has transferred from one school to another.

<b>Name:</b>	First Brad	Middle Pitt	Last Test	Suffix 
<b>Student ID:</b>	001122	<b>Medicaid Number:</b>		
<b>State Testing Number (STN):</b>	001122	<b>Place of Birth:</b>		
<b>Date of Birth:</b>	06/08/2010	<b>Primary Language:</b>	English ▼	
<b>Gender:</b>	Male ▼	<b>Primary Language of Home:</b>		
<b>Grade:</b>	Kindergarten ▼	<b>Language of Instruction:</b>	English ▼	
<b>School Site:</b>	Sample School ▼	<b>Hispanic or Latino Ethnicity:</b>	Yes ▼	
<b>School Year:</b>	2015 ▼	<b>English Language Learner:</b>	Yes ▼	

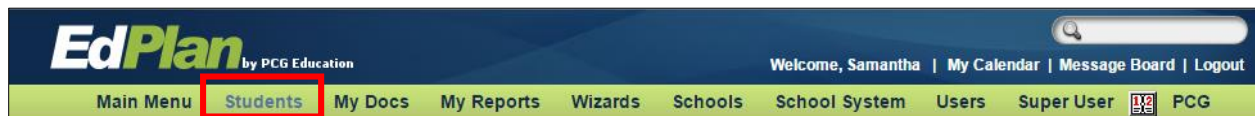
## OK EdPlan™ - Transfer Processes

### From ANOTHER Oklahoma School District

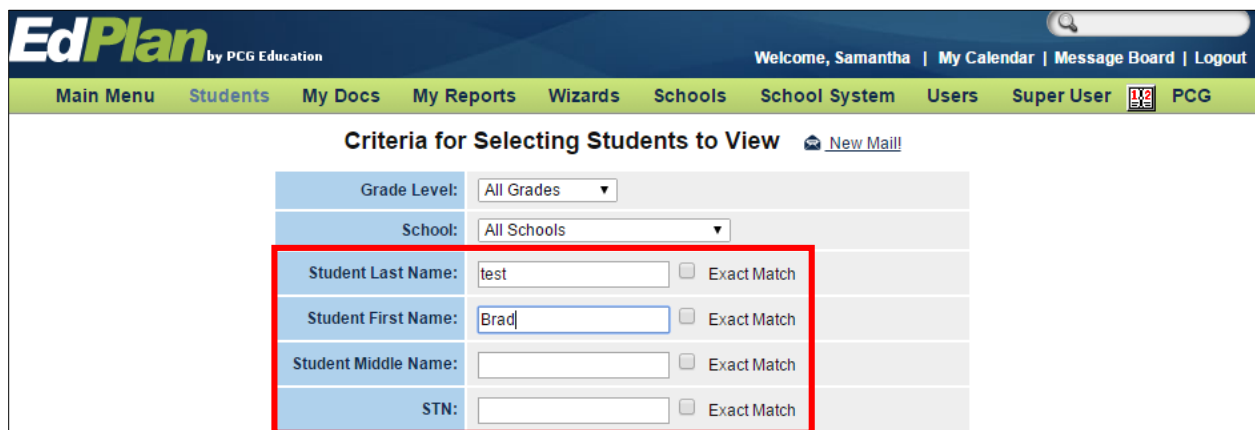
If you have a student that transfers from another district within Oklahoma it is the “receiving district” EdPlan Administrator’s responsibility to request the “sending district” release that record. PCG will collect information on the name of all district’s identified EdPlan Administrators that will be responsible for inactivation of records.

Once it has been determined that the student has received special education in the “sending district”, the EdPlan Administrator in the “receiving district” will contact the “sending district” to advise that the student has enrolled in their district and request the student record be inactivated.

A student can be inactivated by clicking on the Student’s tab in the system:



Searching for the student by entering the first and last name and clicking View Student:

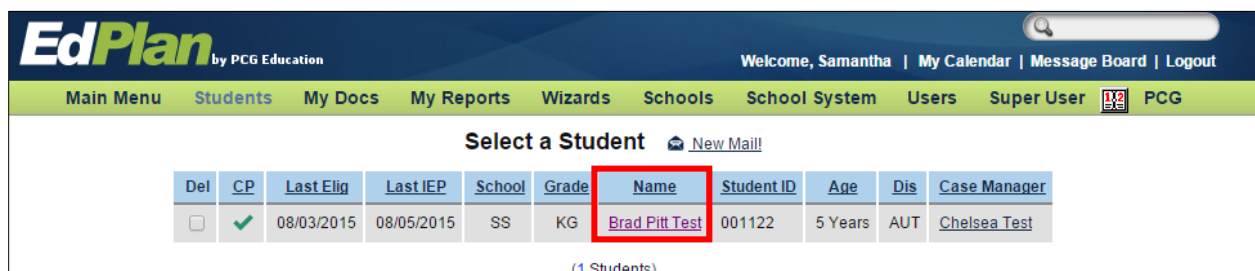


The screenshot shows the 'Criteria for Selecting Students to View' form. The search criteria fields are highlighted with a red box:

- Grade Level: All Grades
- School: All Schools
- Student Last Name: test
- Student First Name: Brad
- Student Middle Name:
- STN:

Each search field has an 'Exact Match' checkbox next to it.

And clicking on that student’s name once the search results have been returned



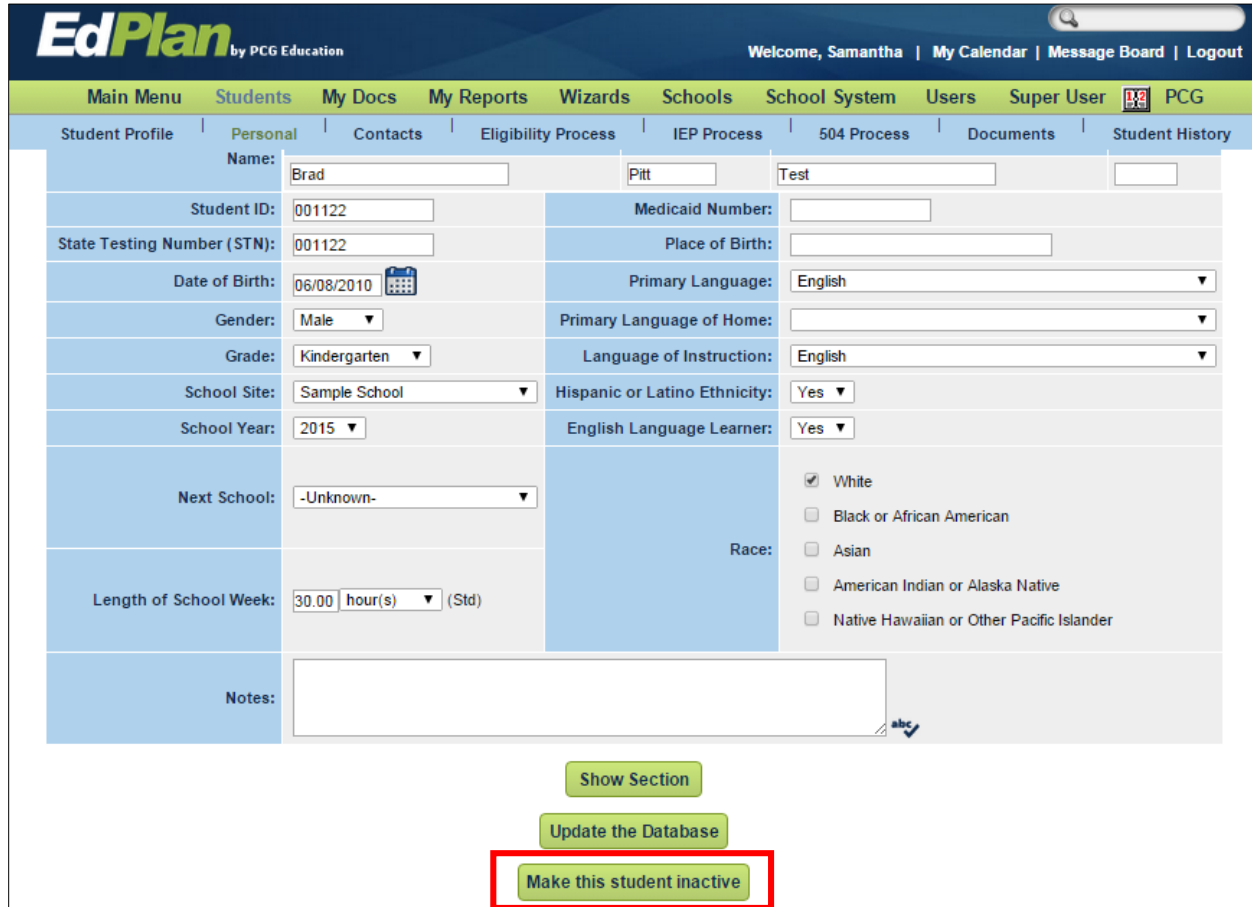
The screenshot shows the 'Select a Student' table. The student 'Brad Pitt Test' is highlighted with a red box.

Del	CP	Last Elig	Last IEP	School	Grade	Name	Student ID	Age	Dis	Case Manager
<input type="checkbox"/>	<input checked="" type="checkbox"/>	08/03/2015	08/05/2015	SS	KG	Brad Pitt Test	001122	5 Years	AUT	Chelsea Test

(1 Students)

## OK EdPlan™ - Transfer Processes

Once you are in the student's record, you can click on the 'Personal' page, scroll to the bottom of the page, and click 'Make This Student Inactive':



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Main Menu | Students | My Docs | My Reports | Wizards | Schools | School System | Users | Super User | PCG

Student Profile | **Personal** | Contacts | Eligibility Process | IEP Process | 504 Process | Documents | Student History

Name: Brad Pitt Test

Student ID: 001122 Medicaid Number:

State Testing Number (STN): 001122 Place of Birth:

Date of Birth: 06/08/2010 Primary Language: English

Gender: Male Primary Language of Home:

Grade: Kindergarten Language of Instruction: English

School Site: Sample School Hispanic or Latino Ethnicity: Yes

School Year: 2015 English Language Learner: Yes

Next School: -Unknown- Race: ☒ White ☐ Black or African American ☐ Asian ☐ American Indian or Alaska Native ☐ Native Hawaiian or Other Pacific Islander

Length of School Week: 30.00 hour(s) (Std)

Notes:

Show Section

Update the Database

**Make this student inactive**

Once you have selected to make the student inactive you will enter the student's exit date, exit reason, and any anticipated services the student may require. The date of inactivation will default to today's date but the user can change it to reflect a date prior to today. You will not be able to enter a date in the future:

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Student Profile | Personal | Contacts | Eligibility Process | IEP Process | 504 Process | Documents | Student History

**Exit Questionnaire** **Brad Pitt Test**  
[New Mail!](#)

Date Exited: 08/07/2015

Reason for Exiting:

Anticipated Services Required:

- ☐ Counseling/Guidance
- ☐ Evaluation VR Services
- ☐ Physical/Mental Restore
- ☐ Vocational/Training Services
- ☐ Transition Employment Services
- ☐ Vocational Placement
- ☐ Post Employment
- ☐ Maintenance
- ☐ Transportation
- ☐ Family Services
- ☐ Independent Living
- ☐ Residential Services
- ☐ Interpreter Services
- ☐ Reader Services
- ☐ Technological Aid
- ☐ Other Services

[Back](#) [Save and Continue](#)

Once this inactivation is confirmed by the receiving district a message should be sent to the Message Board, with the request type of “TRANSFER” including the Student’s First Name, Last Name, DOB, and State Testing number. Click Send Message.

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**Send us a Message** [New Mail!](#)

Message Type: Transfer Request

Subject: Student Transfer

Page Title (if applicable): none

Your E-Mail Address: sdlaw@pcgus.com

Student (if applicable): Brad Test

Enter the Message Here:

Good Afternoon,  
Please transfer Brad Test, DOB 5.20.200- STN 12345678 from District A to District B. We have confirmed the student has been made inactive.]

[Send Message](#)



## OK EdPlan™ - Transfer Processes

The student, if inactive in the sending district, will be transferred to the new district. All information from the workspace and the student history will be available to the new district to allow work and finalization of an IEP.

Once a student is transferred they will appear with a transfer symbol (Yellow T with black arrow). This transfer indicator will remain active for 30 days at which time the indicator will become a red stop sign indicating that a new IEP has not been finalized and action is due by the district.


### From OUTSIDE THE STATE of Oklahoma

If you have a student that enrolls in your district from outside Oklahoma this student's information will be entered in OK EdPlan™ once that student has been enrolled in the SIS and the validation checks within the WAVE have been met.

Once the student's demographic information has been made available to the district, a team should meet and review the existing data and complete the RED process to determine if further assessment is necessary to begin serving the student or whether the student can be made eligible under Oklahoma standards at that time. Since the student has never been in Oklahoma and evaluated by Oklahoma standards, you will consider this an initial evaluation on the RED page and complete the MEEGS document as required.

This data review is for:	<input checked="" type="radio"/> Initial <input type="radio"/> Reevaluation <input type="radio"/> Functional Behavior
--------------------------	---

The initial consent date should be the date that you review the records with the parents and either receive permission to test or acknowledgement that no further testing is required.

TEAM/GROUP RECOMMENDED ACTION BASED ON THE REVIEW OF EXISTING DATA:	
Date of Initial Consent for Evaluation	<input type="text"/> 
<input type="radio"/> Additional Assessments are Necessary	
Additional Comments:	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>
<input type="radio"/> No Additional Assessments Needed	
Justification/Recommendations:	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>

If further assessment is necessary, the team will have 45 school days to determine the student eligibility while providing commensurate services from the student's IEP until that determination is made.

Once the assessment is complete, you will create the Initial MEEGS for OK and create a final IEP document in the OK EdPlan™ System.



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