# OK EDPlan™ - Administrator’s Guide

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EdPlan™ GENERAL INFORMATION

Security

All EdPlan™ information is confidential. The server uses Secure Socket Layer (SSL) technology to encrypt all information as it flows across the Internet. This is the same technology that online merchants and banks use to protect your credit card number and other sensitive information.

Please adhere to the following procedures to ensure security:
- Do not give your account name or password to anyone.
- Do not write your password down where it can be seen by others.
- Do not save documents or reports to an unsecured computer.
- Always log off of EdPlan™ and close your browser when you are finished.

*Note: EdPlan™ will automatically log you out of the system after a period of 30 minutes of inactivity. The system recognizes the saving of data as activity while typing is not recognized.

User Access and Permissions

Access to the various areas of EdPlan™ and the permission to execute various functions are controlled by the user type assigned to each user. Examples of common user types include OK EdPlan™ Administrator, Psychologist, School/District Lead, and Special Educator. Depending on the user type, individuals are assigned either ‘View’ or ‘Edit’ access.

- Users with ‘View’ access only see information on a given screen and cannot edit that information.
- Users with ‘Edit’ access can view and edit information in EdPlan™.

Navigation

EdPlan™ is menu bar driven with tabs along the top on the screen that are used to navigate through the system. Clicking different tabs takes the user to different parts of the database. End users will primarily use the “Students” tab to complete work while Administrators will primarily use the “Admin” tab.
Saving Changes

After a change is made it is very important to click either the ‘Update the Database’ at the bottom of the screen or the, ‘Save’ at the bottom of a panel, or ‘Save and Continue’ at the top right of the page to save the changes. ‘Update the Database’ is equivalent to Save. **Any information entered will be lost if Users forget to click one of these buttons.**

Important Symbols in EDPlan™

Below is a list of icons and a description of functionality for each that appears on many system pages:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Help: This link shows general help information. See the End User Manual for updated, specific information.</td>
</tr>
<tr>
<td><img src="image" alt="Drop down menu" /></td>
<td>Drop down menu: Click on the arrow to make a selection. Only one selection can be made within this list.</td>
</tr>
<tr>
<td><img src="image" alt="Check box" /></td>
<td>Check box: More than one selection can be made. To add or remove a check, click once on the box.</td>
</tr>
<tr>
<td><img src="image" alt="Expand/Collapse" /></td>
<td>Expand/Collapse: Click either of these buttons to view an expanded list of options to view/select.</td>
</tr>
<tr>
<td><img src="image" alt="Spell Check icon" /></td>
<td>Spell Check icon: Click on the icon to launch the spell check function for a specific textbox.</td>
</tr>
<tr>
<td><img src="image" alt="Save and Continue button" /></td>
<td>Save and Continue button: Saves the page and continues to the next page.</td>
</tr>
<tr>
<td><img src="image" alt="Back" /></td>
<td>This button takes the user back one page in a process.</td>
</tr>
<tr>
<td><img src="image" alt="Home" /></td>
<td>Returns the user to the Home Dashboard</td>
</tr>
<tr>
<td><img src="image" alt="Help Desk icon" /></td>
<td>Help Desk icon for communicating with EDPlan Help Desk</td>
</tr>
<tr>
<td><img src="image" alt="Log Out button" /></td>
<td>Log Out button for exiting EDPlan</td>
</tr>
</tbody>
</table>

Logging into the System

Open a web browser and enter your district’s URL in the address bar. We recommend that you save this to your “favorites” or add a short-cut link to your desktop.
My URL is: https://ok.pcgeducation.com/okdistrictsiteiep

Enter your username: (First Name <space> Last Name) not case sensitive.
Enter your password. (see Password Requirements that follows)
Click the ‘Login’ button.

*Note: EDPlan™ is a web-based system. You can gain access using your name and password through any internet service provider on any computer or device with internet access.

**Password Policy**

As part of on-going efforts to uphold security of the data managed, PCG Education™ is moving its suite of hosted application to use hardened passwords for system access.

The hardened password policy is as follows:
- Requires use of complex password
- A minimum of 8 characters
- At least one upper case character
- At least one alphanumeric character
- At least one numeric character
- At least one special character, like @, #, $, % …etc.
**Electronic End-User Agreement**

Upon initial login to the system, users must acknowledge they have read and understand the ‘End-User Agreement’ policy of the EDPlan™ system. They acknowledge this by clicking the ‘Agree’ button on the initial log-in page. If a User does not acknowledge and agree by clicking the ‘Don’t Agree’ button they are automatically logged out of the EDPlan™ system.
All messages are in HTML format. You can use the following information to personalize your messages.

Note: Please use HTML etiquette. If you are unfamiliar with HTML, the following is an active link to a website with guidelines in how to use HTML: http://www.w3.org/TR/html4/types.html

**Tags**

- `<H1>` First level heading. Large text.
- `<H2>` Second level heading. Smaller text.
- `<H*>` Successive levels where * is a number. The larger the number the smaller the text.
- `<P>` Paragraph tag. Used for paragraphs. Uses browser defined paragraph style.
- `<br>` New line. Inserts a new line character.

**Example:**

```html
<h1> This is a test. </h1>
The example above will print the text "This is a test." in large text in the Message of the Day area.
```

**Alignment**

The alignment tag allows you to align text to the left, center, or the right of the screen.

- `<P ALIGN="left"> This is a test. </P>`
- `<P ALIGN="right"> This is a test. </P>`
- `<P ALIGN="center"> This is a test. </P>`

**Example:**

```html
<P ALIGN="left"> This is a test - align Left. </P>
P ALIGN="right"> This is a test - align Right. </P>
P ALIGN="center"> This is a test - align Center. </P>
```

**Color**

The color tag will allow you to add color to your text in the ‘Message of the Day’ section.

- `<H2> <FONT COLOR="RED" > This is a Test. </FONT></H2>`
- `<H2> <FONT COLOR="green" > This is a Test. </FONT></H2>`
- `<H2> <FONT COLOR="blue" > This is a Test. </FONT></H2>`
- `<H2> <FONT COLOR="yellow" > This is a Test. </FONT></H2>`
- `<H2> <FONT COLOR="purple" > This is a Test. </FONT></H2>`
- `<H2> <FONT COLOR="gray" > This is a Test. </FONT></H2>`
Example:

Example:

Example:

Example:

An example of a complex message:

An example of a complex message:
MESSAGE BOARD

To inform Public Consulting Group of any issue, we suggest that users ‘Send a Message’ via the following link on the EDPlan™ “Main Menu” page:

To send a Question, Bug Report, Comment or Suggestion

1. Select which type of message you would like to send by selecting the appropriate option from the drop down menu.
2. Type the specific subject of your message in the ‘Subject’ box, also noting the ‘Page Title (if applicable)’ and ‘Student (if applicable)’ in the appropriate textboxes.
3. Type your message in the ‘Enter the Message Here:’ textbox.
4. Click once on the ‘Send Message’ button.
Once PCG responds to your message, you will receive an e-mail informing you that you have a new message in EDPlan™. All messages and responses are sent internally within the system (ensuring high security protection). Once you have received a reply, the ‘New Mail’ icon will appear on the majority of EDPlan™ screens at the top of the page (enabling you to be aware of incoming mail while working within any student file).

**Accessing Your Messages**

If you have received a response to a message that was sent to the message board, this will appear on your My Messages widget on the Main Menu page.

If you would like to review a message that you have already read in the system you will click on the ‘View All Messages’ link on the “Main Menu” within the ‘My Messages’ widget. Choosing either link will direct users to the following screen, displaying ‘New Messages,’ as well as storing a user’s ‘Previous Messages.’
At the bottom of the “Main Menu” page you will see files that have been made available for viewing, downloading, and/or printing. Files are arranged into a “tab format” (IEP tab, 504 tab, etc.), grouping the documents by category for easy sorting and access. To view a file, click on the name of the file (denoted by a blue hyperlink). The file will open and you will have the option of saving it to your computer. When you are finished viewing the file, click on the “Main Menu” tab at the top of your screen. Do not close your browser as you are still logged in to EDPlan™.

To add additional files to the document library, click the Ellipsis (3 horizontal dots) on the upper right corner of the ‘Documents’ panel and select ‘Upload File(s)’.
On the next screen, to the right of the ‘File to Upload’, click the underlined arrow pointing up to locate the file on your computer.

An optional label can be added to name the file. The file label will default to the document’s file name if this field is left blank.

If the uploaded file is an updated version of an existing file, choose the old version from the ‘Existing File to Replace’ dropdown menu to delete the old document.

To place the file within a certain “document category”/tab, select a category from the ‘File Category field. For your individual district documents you will need to select District from the dropdown menu.

Click Upload File(s) when complete.

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**STUDENT OVERVIEW**

When searching for students, remember that EDPlan™ receives demographic information from the WAVE system for all students. The system will only allow a certain number of students to appear on the screen at once. You can narrow your search by entering the ‘State Testing Number (STN),’ ‘School’, or choosing either ‘General Education’ or ‘Special Education’ and the beginning letters of the child’s last name. Some users might not be able to search for students and may only be able to view their individual caseload depending on their user type.
1. From the “Main Menu,” click the ‘STUDENTS’ tab. This will bring up the sub menu bar.
2. The Sub Menu bar opens 3 options for searching for a student:

   a. ‘STUDENT SEARCH’
   b. ‘RECENT STUDENTS’
   c. ‘INACTIVE STUDENTS’

3. For STUDENT SEARCH, Enter the criteria you wish to search by, such as ‘Student Last Name’, ‘IEP status’, etc. and click ‘VIEW STUDENTS’ in the lower right corner of the panel.

4. Advanced Student Search Page: Select the ‘Advanced Student Search’ button at the top right of the ‘Student Criteria’ panel. Use the “Advanced Student Search” to search for Students by compliance status, disability, special education, or related services (among other options).
### Student Criteria

**Grade Level**  
**School**

**Student Last Name**  
**Student First Name**  
**Student Middle Name**  
**Student ID**  
**STN**  
**Medicaid Number**

### Status

- **General Ed**  
- **Referral**  
- **Eligibility**  
- **IEP**  
- **Section 504 Referral**  
- **Section 504 Plan**  
- **Section 504 Eligible**  
- **Early Childhood Placement**

### Sort By

- [ ] His Medicaid Number
- [ ] Extended School Year

---

**Use the checkboxes below to search for Students using the information from the Current IEP rather than the Workspace.**  
**NOTE:** School and Grade information will be based upon current Student Information when searching.

- [ ] Search for Historical Records

---

**Grade Level**  
**School**

**Student Last Name**  
**Student First Name**  
**Student Middle Name**  
**Student ID**  
**STN**  
**Medicaid Number**

---

**Specialized Transportation**  
**Serving School**  
**Non-Eligibility Determination**
5. Once all the selection criteria are selected, click the ‘VIEW STUDENTS’ button at the bottom of the page to view a list of students that meet all the criteria.
6. The option buttons to the right allows the user to ‘PRINT RESULTS,’ ‘EXPORT RESULTS,’ or to ‘SEARCH AGAIN.’

7. To select a specific student record, click on the name of the student.

8. To Access ‘RECENT STUDENTS,’ click on ‘STUDENTS’ on the main menu bar and click on ‘RECENT STUDENTS’ on the sub menu. ‘Recent Students’ displays students based on the most recently accessed student files. The most recently accessed files will display at the top of the list of quicker access. This is sorted by date ‘Last Accessed.’

9. To access ‘INACTIVE STUDENTS,’ click the ‘STUDENTS’ tab on the Main Menu Bar followed by the ‘INACTIVE STUDENTS’ tab on the Sub Menu Bar.
10. Inactive Students can be searched by one or more options:
   a. Last School Attended
   b. Student Name
   c. Date of Birth
   d. State Testing Number (STN)
   e. Exit After Date
   f. Exit Before date
   g. Exit Reason

11. Once the search criteria are entered, click the ‘VIEW INACTIVE STUDENTS’ button at the bottom of the page.

Student Compliance Overview

Every student in EDPlan™ has a compliance symbol associated with their name. The compliance symbol can be found in two places: the “Select a Student” page and the “Student History” tab for that student. In both locations, the compliance symbols are found next to the student’s name. When viewing your caseload, the compliance symbols are a quick way to see which students are in or out of compliance, as well as students who have approaching deadlines.
Definitions of compliance symbols are on the next page.
## Definitions of compliance symbols

<table>
<thead>
<tr>
<th>Symbol</th>
<th>The student has been determined Eligible for IFSP or Special Education but is past due for their re-evaluation and is out of compliance.</th>
<th>When a re-evaluation is performed, you should update the student Eligibility Date. You can do that on the student's Eligibility page.</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Red Circle]</td>
<td>The student has been determined Eligible for IFSP or Special Education and will soon require their re-evaluation.</td>
<td>Same as above.</td>
</tr>
<tr>
<td>![Yellow Triangle]</td>
<td>Either 1) The student is Eligible and has an IEP / ISP / IFSP, but is now past due to have a new one written and is now out of compliance, or 2) it has been &gt; 30 days since this student's Eligibility Date and no IEP has been recorded (i.e. the student's Last IEP Date field is empty).</td>
<td>When you generate an IEP for this student using EDPlan™, the Last IEP Date will automatically be updated. However, if you do a hand-written IEP, you will need to manually update this student's Last IEP Date. You can do that on the student's Eligibility page.</td>
</tr>
<tr>
<td>![Yellow Triangle]</td>
<td>Either 1) The student is Eligible and has an IEP / ISP / IFSP and will soon require that a new IEP / ISP / IFSP be written, or 2) it has been &gt; 23 days since this student's Eligibility Date and no IEP has been recorded (i.e. the student's Last IEP Date field is empty).</td>
<td>Same as above.</td>
</tr>
<tr>
<td>![Green Check Mark]</td>
<td>Student has been referred (and may have Parental Consent to Evaluate). The student is now past due to receive their initial Eligibility determination and is out of compliance.</td>
<td>When a student's Eligibility status is determined, that, along with the date of the Eligibility determination, should be entered on the student's Eligibility page.</td>
</tr>
<tr>
<td>![Yellow Triangle]</td>
<td>Student has been referred (and may have Parental Consent to Evaluate). The student will soon need their initial Eligibility determination completed.</td>
<td>Same as above.</td>
</tr>
<tr>
<td>![Green Check Mark]</td>
<td>All appropriate Eligibility and IEP information has been entered for this student.</td>
<td>Make sure the student has a final IEP and option in the system.</td>
</tr>
<tr>
<td>![Green Check Mark]</td>
<td>No Eligibility or IEP information has been entered for this student; this usually denotes a regular education student.</td>
<td>To enter the student into special education, fill in the Eligibility page.</td>
</tr>
<tr>
<td>![Green Check Mark]</td>
<td>All appropriate Eligibility and 504 information has been entered for this student.</td>
<td>Make sure the student has a final Eligibility Report and 504 Service Plan in the system.</td>
</tr>
<tr>
<td>![Green Check Mark]</td>
<td>The student has recently transferred into this school system and will require IEP/ISP/IFSP to be finalized within 30 calendar days written.</td>
<td>Make sure the student has a new finalized IEP/ISP/IFSP. Finalized by the receiving district either as a new IEP/ISP/IFSP or as a subsequent IEP/ISP/IFSP to show the receiving district accepted the IEP/ISP/IFSP from the sending district.</td>
</tr>
<tr>
<td>![Question Mark]</td>
<td>Six months prior to the child’s 6th birthday a question mark will appear as a reminder the ECE data is required within 6 months.</td>
<td>Complete the ECO exit information within the Early Childhood Data Collection.</td>
</tr>
</tbody>
</table>
Once the student has turned 6 years old and has an entrance date of greater than 180 the symbol will turn red to indicate the information is past due.

Complete the ECO exit information within the Early Childhood Data Collection.

The student has been reactivated in EDPlan after having been inactive for a period of 30 days or longer.

Complete an Addendum or Subsequent IEP.

The student has been reactivated in EDPlan after having been exited with an exit reason of ‘Home Schooled,’ and has been inactive for a period of 30 days or longer.

Complete an Addendum or Subsequent IEP.

The student has been reactivated in EDPlan after having been exited with an exit reason of ‘Exit to Private School,’ and has been inactive for a period of 30 days or longer.

Complete an Addendum or Subsequent IEP.

Inactivating Student Documents and Events

Special Education Directors or EDPlan™ Administrators may have the permissions to inactivate student documents created in error. Documents may be inactivated from the student’s document page or the student’s history page. Documents located on the student’s document page with an ‘E’ to the left are defined as ‘events’ and may be inactivated from the student’s history page. Only documents or events within 3 years old may be inactivated by the assigned district administrator. All other documents or events older than 3 years old must be inactivated by the EDPlan™ help desk staff.

Inactivate Documents from the Documents tab

Inactivate a document from the student’s Documents tab by simply checking the box under the ‘Del’ column and click ‘Update the Database’ button.

Student History Page

The Student History page provides a historical listing of all events created for a specific student. Events are sorted chronologically by the Event Date on the Student History page. If an event has the same Event Date then it is sorted by the Begin Date and then by the Date Created. Only events within the past three years
can be inactivated by the district administrator. Events from previous years should not be inactivated from the Student History unless they are incorrect. It is important to keep previous events in the Student’s History.

Inactivating Events

Inactivate an event from the student history page

Events are created when an IEP document is finalized, Eligibility Determination is finalized or there is a change in School/Grade level for the student. Draft documents do not appear on the Student History page. There are a few instances when an event is inactivated from the Student History page:

- A clerical error was made and a new IEP or Eligibility document was created to replace the incorrect document.
- Duplicate documents are created. There should only be one IEP each year for a student except for IEP Addendums.
- There is a manual event in the Student History, meaning there is a not a final document associated with the IEP.

1. Check the ‘Del’ box next to the Event(s) that need to be inactivated.
Inactivate an IEP that has associated Progress Reports

If an IEP needs to be inactivated and there are Progress Reports associated with it, the Progress Reports must be inactivated before the system will allow the deletion of the IEP. It is recommended the progress reports be printed or saved to your computer and attached to the student’s document page with Paperclip.

1. Check the ‘Del’ box for all the Progress Reports that are associated to the IEP that needs to be inactivated.

2. Click ‘SAVE’ button in the lower right corner of the panel.

3. Check the ‘Del’ box for the IEP that needs to be inactivated.

4. Click the ‘SAVE’ button in the bottom corner of the panel.
MY DOCS TAB

The My Docs tab displays the Case Manager’s Student documents. This tab allows Case Managers to view and print all documents for Students on their caseload.

From the Main Menu click the ‘MY ACCOUNT’ from the Main Menu. From the Sub Menu, select ‘MY DOCS.’

The My Docs tab contains documents the Case Manager or IEP Team member has created for a Student. This tab allows the User to view and print documents without going to each Student’s document page to view and print documents. Below is an example of the My Docs tab after documents are created for Student(s). Clicking on the document name opens the document with Adobe Acrobat Reader.

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Created By</th>
<th>Student</th>
<th>Status</th>
<th>Document Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/12/2021</td>
<td>Jill Burroughs</td>
<td>JILL</td>
<td>PDF</td>
<td>OK 1234567 pdf</td>
</tr>
<tr>
<td>07/16/2021</td>
<td>EDPlan Admin</td>
<td>IEP Plan</td>
<td>PDF</td>
<td>OK 1234567 pdf</td>
</tr>
<tr>
<td>07/18/2021</td>
<td>Ryan K.</td>
<td>IEP Plan</td>
<td>PDF</td>
<td>OK 1234567 pdf</td>
</tr>
<tr>
<td>07/20/2021</td>
<td>EDPlan Admin</td>
<td>IEP Plan</td>
<td>PDF</td>
<td>OK 1234567 pdf</td>
</tr>
<tr>
<td>07/22/2021</td>
<td>Jill Burroughs</td>
<td>JILL</td>
<td>PDF</td>
<td>OK 1234567 pdf</td>
</tr>
<tr>
<td>07/24/2021</td>
<td>Jill Burroughs</td>
<td>JILL</td>
<td>PDF</td>
<td>OK 1234567 pdf</td>
</tr>
</tbody>
</table>

BATCH PRINTING

Batch printing allows Users the selection of specific Student documents and printing all at one time. To print documents in a batch:
1. Click on the My Docs tab.
2. Under the ‘Batch’ column, check the box next to each document to print.
4. To print selected documents, use the ‘Print’ icon on the Adobe toolbar.

**TOOLS TAB**

The Tools tab is where the EDPlan tools are located. Once ‘Tools’ is selected from the Main Menu, the sub menu displays 4 options:

a. Wizards – Tool that simplifies the process of creating the same document for multiple students.
b. SmartScan – Tool that allows users to batch upload scanned pages without navigating to each student’s record one at a time.
c. Assign Schools – Tool that changes the School and/or Grade for multiple students
d. Assign Teachers - Tool that simplifies assigning/changing Case Manager.
Available ‘WIZARDS’ include:

Caseload Administration Wizard

1. From the Main Menu click the ‘Tools’. From the Sub Menu, select ‘Wizards’.

2. Click the Caseload Administration Wizard link.

3. Search for the User by ‘School,’ ‘User Type,’ ‘Last Name,’ ‘Title,’ and/or ‘User Code.’ Select the User by clicking on the appropriate name.
4. The Current Caseload page appears.
5. Use the ‘Check All’ and ‘Check None’ buttons as needed.

<table>
<thead>
<tr>
<th>Teacher of Record</th>
<th>Team Member</th>
<th>Student</th>
<th>School</th>
<th>Grade</th>
<th>Date Of Birth</th>
<th>Current Teacher of Record</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Zachary K Ballard</td>
<td>MSB</td>
<td>10</td>
<td>05/02/2005</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Freda K Chapman</td>
<td>ESB</td>
<td>03</td>
<td>08/11/2012</td>
<td>Bobette Test</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Janice M Collier</td>
<td>MSB</td>
<td>06</td>
<td>07/06/2009</td>
<td>Bobette Test</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Garry L Santos</td>
<td>MSB</td>
<td>06</td>
<td>02/03/2009</td>
<td>Bobette Test</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Kotty Test</td>
<td>ESB</td>
<td>05</td>
<td>04/01/2010</td>
<td>Bobette Test</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ryan K Test</td>
<td>MSB</td>
<td>08</td>
<td>04/09/2007</td>
<td>Bobette Test</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Emma M Weaver</td>
<td>MSB</td>
<td>06</td>
<td>02/03/2009</td>
<td>Bobette Test</td>
</tr>
</tbody>
</table>

6. Click the ‘Update the Database’ button to save information and leave the page.
7. Click the ‘Add More Students to Caseload’ button to search for more Students to place in a User’s caseload.

REMOVING STUDENTS FROM A CASELOAD

1. To remove Students from a caseload, click on the ‘Remove All Students from Caseload’ button.

2. A confirmation page appears, asking for confirmation of the removal.

Do you, ZendeskAdmin Test, confirm that you wish to remove all Students from Bobette Test’s Caseload?

   YES, REMOVE ALL STUDENTS FROM CASELOAD  NO, DO NOT REMOVE ALL STUDENTS
1. To transfer or copy a caseload, click on the ‘Transfer/Copy Caseload to Another User’ button.

2. To copy a caseload select ‘Copy’ in the first dropdown and then select the User in the second dropdown.

3. To transfer a caseload select ‘Transfer’ in the first dropdown and then select the User in the second dropdown.

Note: Caseloads can be copied and transferred when BOTH users have been set up in EdPlan with the same User Type and have access to the same building sites.

4. Click the ‘Review Students and Continue’ button.

SCHOOLS TAB

The schools tab allows users to check compliance for individual schools. Any ‘red’ slice in the compliance symbol next to the school name indicates something is out of compliance for one or more users within that school. Users will be able to view school specific information, including compliance by individual users and students. Note: Compliance symbols for schools update overnight.

To View School Compliance

1. From the “Main Menu,” click on the “Schools” tab under “Administrator.”
2. Click on the compliance symbol next to a specific school.

3. On the next page, click on the compliance symbol next to a specific user. This will show you student-specific compliance.

4. From here you can click on the student's name to go to the student’s tab/pages, or you can click on the compliance symbol to view the Student History page.
Calendar

A new District Calendar is essential for each school year. Follow the steps below for adding a new District Calendar in EasyIEP™.

1. Add the new school year to the Calendar. Click on the Calendar icon on the main menu bar. Scroll to the bottom and click on the ‘Edit School Years’ button.

2. Scroll to the bottom and Click the ‘Add next school year’ button to add the new school year.
It is crucial to have at least three future Calendar years in the list of school years. The future school years are used with the calculation of the Projected IEP Date and Projected Eligibility Date located on the Student’s Eligibility Process/Referral page.

Future Calendars use temporary ‘place holder’ dates that are easily updated when your school board determines the actual District Calendar dates. A good set of placeholder dates are the federal reporting period dates of July 1 as begin date and June 30 of the following year as the end date.

When the actual District Calendar dates are determined by the school board, enter the first instructional date as the begin date for the current school year on the School years page.

3. Enter the ‘Begin Date’ and ‘End Date’ for the new school year. Click on the Calendar icon again to return to the ‘Calendar’ view page. When the actual District Calendar dates are determined by the school board, enter the first instructional date as the begin date for the current school year on the School years page.

4. Select the ‘Month’ and ‘Year’ to view each month of the school year. Click on a specific date to identify as a non-school day.

5. Select the ‘Day Type’ from the drop down menu options and enter a ‘Label’ to appear on the Calendar.
6. Click ‘Update the database’.

7. To mark multiple days as non-school days, click on the first date in the series.
8. Select the ‘Day Type’ from the drop down menu options and enter a ‘Label’ to appear on the Calendar. Enter the date range using the format described in the ‘Note’ and in the example below. Click ‘Update the Database’ to save changes. Continue through each month in the District Calendar from the first day of school to the last day of school.

<table>
<thead>
<tr>
<th>Level</th>
<th>Day Type</th>
<th>Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>School System</td>
<td>Non School Day</td>
<td>ice storm</td>
</tr>
</tbody>
</table>

Be sure to mark Summer days with a day type of Summer. Summer days may include the last of May, June, July and beginning of August depending on the begin date of the next school year. It is important to mark Summer days because this affects the calculation of the Projected Eligibility Date and Projected IEP Date located on the Student’s Eligibility tab.

All Summer days show as blue on the calendar.
Progress Reporting Periods

1. Set up the Progress Report Periods to coordinate with your Progress Report and Report Card schedule. Click on the Calendar icon on the main menu bar. Scroll to the bottom and click on ‘Edit School Years’. Click the ‘Edit’ button in the ‘Report Periods’ column for the new school year.
2. Click the ‘Add Another Reporting Period’ button until the list contains the correct number of report card periods for the District.

<table>
<thead>
<tr>
<th>Reporting Period</th>
<th>Reporting Period Name</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Due Date</th>
<th>ESY</th>
<th>Cal Days</th>
<th>Sch Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Reporting Period 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Reporting Period 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Reporting Period 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Reporting Period 4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NOTE: If you delete a given reporting period, ALL higher numbered reporting periods will also be deleted.

2. Scroll down and click the ‘Auto-fill Begin and End Dates’ button or define periods by entering specific ‘Begin and End Dates.’ It is recommended to include the begin and end date in the Reporting Period Name (e.g., 1st 9 Weeks 8/15/18-10/15/18). Clicking the Update the Database button saves the report periods and updates the ‘Cal Days’ and ‘Sch Days’ fields.

Custom Calendars

If your District has any Schools with a different School Day Calendar than the rest of the District, create a Custom Calendar for that School.

1. Select the Schools tab under Administrator.

2. Click on the Calendar icon beside the School. Follow the same steps to add the Calendar days and ADM Reporting Periods and Progress Reporting Periods.

Schools

<table>
<thead>
<tr>
<th>CP</th>
<th>School Name</th>
<th>Abbrev</th>
<th>Code</th>
<th>Address</th>
<th>City, State Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Elementary School B</td>
<td>ESB</td>
<td>ESB</td>
<td>4578 Main Street</td>
<td>Tulsa, OK</td>
</tr>
<tr>
<td></td>
<td>High School B</td>
<td>HS8</td>
<td>HS8</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Middle School B</td>
<td>MSB</td>
<td>MSB</td>
<td>900 School Street</td>
<td>Tulsa, OK</td>
</tr>
</tbody>
</table>

Showing 1 to 3 of 3 entries
ADMINISTRATOR TAB

School System

The School System information is entered by an EDPlan™ Administrator. An important field on this page to update each new school year is the ‘School Year’ drop down selection. This triggers the correct current school year to show on each student’s Personal page.

1. Click on the Administrator Tab.
2. Click on the District Info Tab

<table>
<thead>
<tr>
<th>School System Name</th>
<th>OK ezUI PCG UAT site</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Year</td>
<td>2021-2022</td>
</tr>
<tr>
<td>School System Code</td>
<td></td>
</tr>
</tbody>
</table>

Summary

The Summary page gives an overview of the District’s information in EDPlan™.

1. Click on the Summary tab.
2. Click on the individual links to view the summary information.

Reports

From the Reports tab; Federal, State and Local reports are available.

1. Click on the Reports tab.
2. Click on the appropriate Report section. EDPlan Explore is the Advanced Student Search. EDPlan Everyday is standard reports. EDPlan Insights is the Advanced Reporting System.

3. Click the appropriate Report needed in EDPlan Everyday. Please review the Reports tab for a full listing of all reports available.

Keep and Rename Reports

This feature allows specific Users the permission to mark reports for permanent retention and assigning custom names to individual reports.

1. Click the Reports tab.
2. User types who have permission to keep and rename reports view two additional columns, ‘Keep’ and ‘Custom Name’, under the ‘Saved System Reports’ section of the Reports page.
3. To permanently retain one or more reports in the system, check the ‘Keep’ checkbox next to the desired report(s).
4. A custom name or short description for each report is also an option. The name uses a maximum of 128 characters.

<table>
<thead>
<tr>
<th>Date Generated</th>
<th>Created By</th>
<th>Report Type</th>
<th>Expiration Date</th>
<th>Keep</th>
<th>Custom Name</th>
<th>Attachment File</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/06/2021</td>
<td>Jeff Burnoughs</td>
<td>Consent to Eligibility Data Report</td>
<td></td>
<td></td>
<td>Eligibility August 2021</td>
<td></td>
</tr>
</tbody>
</table>

Notes:
- After the ‘Keep’ option is selected for a report, the report’s Expiration Date column is changed to empty.
- A report with the ‘Keep’ checkbox selected remains on the Saved Reports list indefinitely.
- If a custom name is added to a report but the current User does not have ‘Keep Reports’ permission, the custom name appears as view-only.
- Users with appropriate permission can enter a custom name for a report even if they do not mark it ‘Keep’.
- When a User unselects the ‘Keep’ checkbox for a ‘kept’ report, the report’s expiration date is automatically reset to five days later. Once five days have passed, the report is deleted, unless the ‘Keep’ checkbox is selected again within that time.

**Advanced Reporting**

The advanced reporting system is available through the Reports tab. OSDE has designed a number of reports in the advanced reporting system that are available for districts to utilize.

1. Click on the Reports tab.
2. Click on ‘Start Advanced Reporting System.’
3. Double click ‘OK Reports Library’ to access available reports.

4. Double click any report to generate that report.

Inactive Students

The Inactive Students tab allows Users to search for inactive Students and review the Student’s history in EDPlan™.

1. Select the Students tab, then click on the Inactive Students tab and search for a Student record.

2. Enter a Student’s last name and first name and click ‘View Inactive Students’.
3. A list of Students meeting the search criteria displays.

<table>
<thead>
<tr>
<th>Test - Student ID</th>
<th>State Testing Number (STN)</th>
<th>Name</th>
<th>Date of Birth</th>
<th>School</th>
<th>Date Exited</th>
<th>Reason for Exiting</th>
</tr>
</thead>
<tbody>
<tr>
<td>54434454</td>
<td></td>
<td>Janie Smith</td>
<td>10/16/2017</td>
<td>FF</td>
<td>07/29/2019</td>
<td>Withdrawn from school under the age for compulsory attendance</td>
</tr>
<tr>
<td>JTTEST</td>
<td></td>
<td>John Doe</td>
<td>04/09/1990</td>
<td>SS</td>
<td>04/12/2010</td>
<td>Graduated with Diploma</td>
</tr>
<tr>
<td>KENNEDY6TN</td>
<td></td>
<td>Kennedy Jones</td>
<td>07/01/2005</td>
<td>SS</td>
<td>07/25/2016</td>
<td>Graduated with Diploma</td>
</tr>
<tr>
<td>MM12415</td>
<td>12401524036552345</td>
<td>Monday Mover</td>
<td>01/16/2001</td>
<td>ServCh</td>
<td>05/16/2019</td>
<td>Graduated with Diploma</td>
</tr>
<tr>
<td>123346987</td>
<td>12346987</td>
<td>Randy Test</td>
<td>12/01/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEST0123</td>
<td>TEST0TN123</td>
<td>Tony Test</td>
<td>12/15/2001</td>
<td>SS2</td>
<td>12/25/2015</td>
<td>Dropped Out of School</td>
</tr>
<tr>
<td>1115333</td>
<td>1001233333</td>
<td>Vietnam Test</td>
<td>12/30/2011</td>
<td>SS</td>
<td>08/13/2015</td>
<td>Transfer to Another School System</td>
</tr>
</tbody>
</table>

4. Click on the Student's name and click on the ‘Student History’ tab to view the Student's history.

   **Student History**
5. Click on the ‘Details’ button for additional information about each event.

**Student Reactivations (children transitioning from SoonerStart)**

When a child is transitioning from SoonerStart, the child’s records are shared with the district. The child will populate in Inactive Students, and will need to be reactivated to begin the eligibility process.

1. Click on the Student tab, then click on Inactive Students.
2. Enter the Student’s information and click ‘View Inactive Students’.
3. Click on the Student’s name.
4. Enter a Re-activation Date and click ‘Re-Activate this Student in the Database’.

![Screen shot of reactivation process]

5. Confirm the Reactivation.

**User Types**

User Types are how EDPlan™ determines a User’s level of permission and access to student records. Users with similar job functions ideally are grouped into a specific User type.
To View User Types:

1. From the Main Menu, click on the Admin tab and click on User Types.

2. Click on the User Type to review the permissions.

<table>
<thead>
<tr>
<th>ID</th>
<th>User Type</th>
<th># Users</th>
<th>Assoc with All Schools</th>
<th>Assoc with All Grades</th>
<th>Can Be Teacher of Record</th>
<th>Can Be IEP Team Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>State OK EdPlan Administrator</td>
<td>61</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>28</td>
<td>State OKEdPlan Read Only</td>
<td>2</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>12</td>
<td>EdPlan Easy/EP Administrator (Admin Edit)</td>
<td>18</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>14</td>
<td>Certifying Specialist (Building Admin)</td>
<td>7</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>16</td>
<td>District-wide Consultant</td>
<td>1</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>17</td>
<td>School/Deputy Lead (Admin Support Edit)</td>
<td>1</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>19</td>
<td>School Administrator (Build Admin Read)</td>
<td>1</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>34</td>
<td>Special Education (Teacher Edit)</td>
<td>11</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>13</td>
<td>School Psychologist</td>
<td>1</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>29</td>
<td>School Counselor</td>
<td>1</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>15</td>
<td>Related Service Provider</td>
<td>4</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

3. This screen displays a quick snapshot of the permission level of this User Type. To view the specific permissions, click on the ‘View Permissions’ button.
USERS TAB

Changing a User’s Password and Updating Their Personal Information

1. From the Main Menu, click on the “Administrator” tab and select “Users” from the dropdown.

2. Enter a user’s last name and click ‘View User(s).’

3. Select the user’s name to view or edit that user’s information.

4. The “Edit User Info” page is divided into three sections. The top section is the user’s personal information. You can change or edit any of these fields by typing into the textboxes. Changing a user’s first name, middle name, or last name will change his/her login user name. A user’s password can be changed by typing a new password into the ‘Password’ and ‘Password (again)’ textboxes. Click ‘Update the Database’ at the bottom of the page to save the modifications/additions.

5. The second section of the “Edit User Information” page is the user type and school association area. Choose a user’s ‘User Type’ from the dropdown menu. The user type dictates what information a user will be able to view or edit in EDPlan™. User types with an asterisk (*) next to their name have access to all schools within the current site/district. Click ‘Update the database’ at the bottom of the page to save the modifications/additions.
6. The last section of the “Edit User Information” page is the ‘Disability and Service Certifications’ table. The Disability Certification table is not currently used in Oklahoma, but the Service Certification table will give related service providers access to their logging wizards. If a user is certified to provide a service check the “Can Provide” box next to their service name. Speech pathologists should have both Speech/Language and Special Education-SI selected as services. Click “Update the database” at the bottom of the page to save the information.

If the user is certified to provide services, click the View button next to the related service. Then click the Add Certification button. Enter the certifying agency, choose the certification type, and enter certification begin and end dates (if that information is available). Click Add Certifications to save the information. PCG will only bill Medicaid for services provided by certified related service providers.

Adding New Users

1. To add a new user into EDPlan™, click the ‘Add New User’ button at the bottom of the “Users” tab.
2. Enter a user’s demographic information as outlined in numbers 4, 5, and 6 of the Changing a User’s Password and Updating Their Personal Information section of this manual. ‘First Name,’ ‘Last Name,’ ‘User Code,’ ‘Password,’ ‘Password (again),’ ‘User Type,’ and ‘School(s)’ are all required fields. The ‘User Code’ can be any unique ID assigned to that user. Employee IDs are good codes to use but something as simple as a person’s first and last name (without a space) will suffice. Click the ‘Add User to Database’ button at the bottom of the screen to save the information.

Inactivating Users

1. Search for a user from the “Users” tab.

2. Click the ‘Del’ (delete) checkbox to the left of the user’s name and select ‘Inactivate Selected Users’.
3. Select, “Yes, I’m sure” to confirm the inactivation.

Please review the following list of users to be certain you want to inactivate these users

1. Karen Test (335)

YES, I’M SURE  NO, I CHANGED MY MIND
Compliance Email Alerts

Compliance email alerts are added for either a specific User or a User type. These alerts warn Users of timelines approaching or missed. Compliance alerts are setup to track IEP, Eligibility and/or Reevaluation dates. Compliance alerts are the best way for Directors and other District level staff members to stay up-to-date with their District’s compliance.

1. Search for a user from the “Users” tab.
2. Select a user’s name.
3. Scroll to the bottom and select ‘Add an E-mail Alert’
4. You will then select what ‘Type’ of alerts you would like to send to the user.

   - All
   - Rejected IEP (10 Days or Greater)
   - Rejected Section 504 Eligibility (10 Days or Greater)
   - Rejected Section 504 Non-Eligibility (10 Days or Greater)
   - Rejected Eligibility (10 Days or Greater)
   - Rejected ISP (10 Days or Greater)
   - Proposed Section 504 Plan (10 Days or Greater)
   - Proposed Section 504 Eligibility (10 Days or Greater)
   - Proposed Section 504 Plan
   - Rejected Non-Eligibility (10 Days or Greater)
   - Section 504 Eligibility
   - Section 504 Plan
   - IEP

   Note: Separate multiple values with a comma. The values may be negative. Types listed with day settings will ignore this field.

MY ACCOUNT TAB

The first time you login to EDPlan™ you will need to change your password. Click on the How to choose a good password hyperlink if you need help.

To Change Your Password

1. From the “Main Menu,” click on the “My Info” tab.
2. Enter your current password.
3. Type your new password in both the ‘New Password’ and ‘New Password (to verify)’ boxes.
4. Verify your e-mail address and phone numbers are correct.
5. Click the ‘SAVE’ button located in the bottom right of the panel.

After updating the database, a confirmation box will open. By clicking ‘OK’ in the confirmation box, you will have successfully changed your password (as well as saved any other information that was modified/added). District system administrators will have the ability to change your password should you forget it and/or you are unable to log in.

**LOGGING OUT OF EDPlan™**

**Always Log Out and Exit the Browser**

If you do not log out and close your browser, anyone can access information in EDPlan™ or record information under your log-in name.

**To log out of EDPlan™**

1. Click the button on the far right of the menu toolbar.
2. After you log out, close your browser:
OK EDPlan™ – Administrator’s Guide

- Mac users: Click the ⌘ in the upper left hand corner of your screen.
- PC users: Click the ‘X’ in the upper right hand corner of your screen.

*Important Notes:
- You can log out from any part of the system.
- You do not have to go back to the “Main Menu.”
- You must log out of EDPlan™ and close your browser if you:
  - Step away from your computer.
  - Finish using the system.
  - Leave for the day.

REMINDERS

- Use the Message Board for EDPlan™ Help Desk questions, report bugs or post suggestions. This is found on the Main Menu page of EDPlan™.
- All Message Board requests must include a student’s full name, Student Testing Number (STN), and date of birth for further research by the EDPlan™ Help Desk. If the requests are in reference to users or user types, please include specific examples.
- Use the Navigational Toolbar to navigate through the screens, rather than browser back or forward arrows.
- Always ‘Update the database’/‘Save’/‘Save and Continue’ to save data entered.
- When typing long quantities of notes (e.g. “Strengths/Needs, Special Factors, and Parent Concerns” page), save your data frequently. **A user is logged out after 30 minutes of inactivity, and typing is NOT considered an activity. If you have not saved your work in 30 minutes, your work will not be saved when the system automatically logs you out.**
- A finalized IEP document is required to create an IEP-At-a-Glance document.
- A finalized IEP document is required to create a Progress Report.
- **Do not use the ‘Back’ button on the browser tool bar- this can disrupt correct processing, and any data you have added to the page will be lost. Always use the Back button within EDPlan, found at the bottom of the page, or click the name of the page on the menu bar that you would like to navigate back to.**
- Make sure each user has entered their email which will enable their use of the ‘Forgotten Password’ feature.