OK EdPlan™

Administrator's Manual

Revised August, 2016

OK EdPlan™ - Administrator's Manual

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WHO IS PUBLIC CONSULTING GROUP (PCG)

Public Consulting Group, Inc. (PCG) is a management consulting firm committed to providing the highest level of service and quality products to state and local government clients and assisting them in endeavors to enhance revenue, reduce costs, increase operational performance, improve efficiency and streamline technology. Established in 1986, PCG focuses on targeted lines of business and on building lasting client relationships in the areas of education, government finance and health and human services.

PCG'S REVENUE CASE MANAGEMENT (RCMS)

PCG's Revenue Case Management (RCMS) has achieved numerous successes working with School Districts, State Departments of Education, and Medicaid Agencies across the nation since 1992. Working with school districts ranging in size from 200 students to 435,000 students, PCG offers full service consulting integrated with innovative and scalable technology solutions to address the changing needs of the K-12 education community. Our expertise spans across various education administrative functions and our objective is to provide districts with the resources they need to accomplish their goals utilizing one vendor. Below we highlight several of our RCMS services.
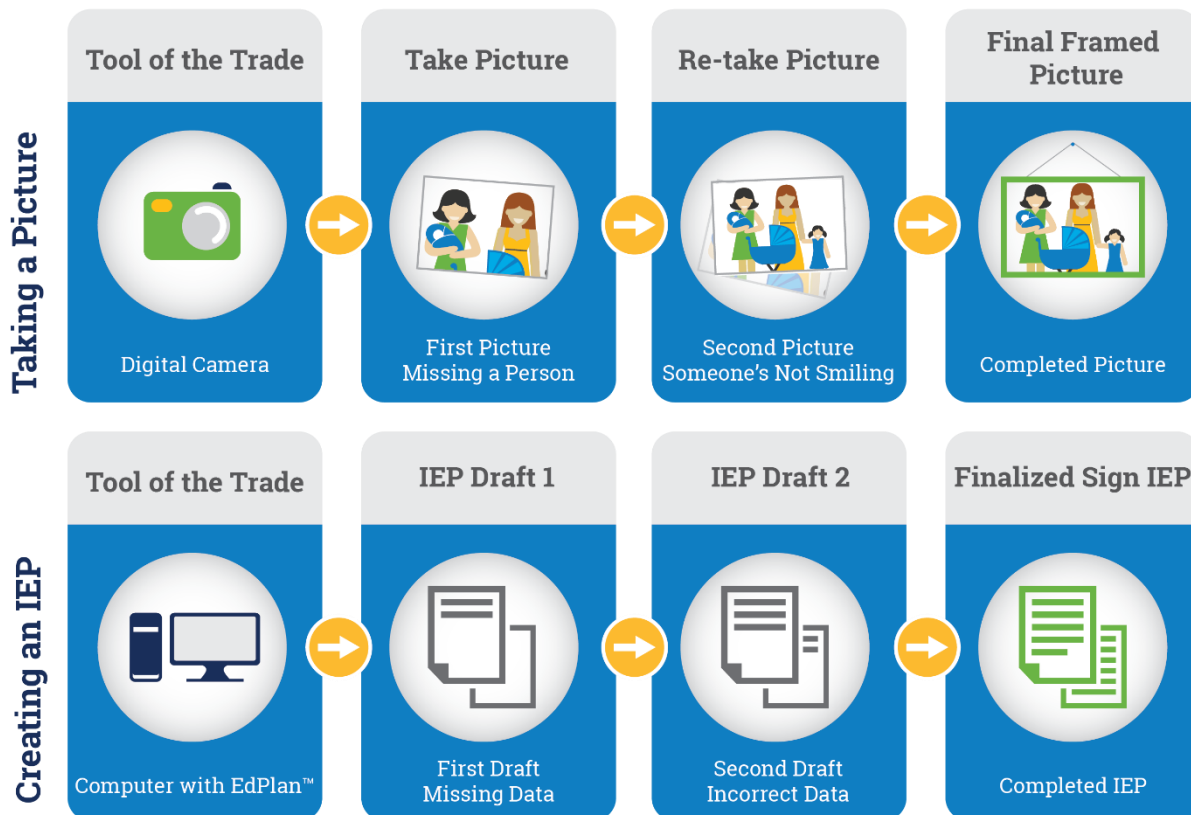
Our service and product offerings include:

- **Special Education Consulting Services**: PCG offers comprehensive services and customized technology solutions to special education departments.
  - **EdPlan™ EasyIEP™** is an internet-based solution for the development of Individualized Education Program (IEPs) and for the management of special education reporting. EasyIEP™ provides administrators with a powerful management tool, extensive reporting capabilities and instant access to student information securely via the internet.

- **Medicaid Reimbursement Consulting Services**: PCG has extensive experience working with school districts to maximize Medicaid reimbursement for health-related services and administrative outreach activities.
  - EasyTRAC™: Internet and tablet based solution for the documentation of health-related services provided to special education students. Clinicians can easily document services provided – anytime, anywhere.
- **RTI-Academics**: Module that provides early warning indicators based on student performance data, and that facilitates Response to Intervention planning, tracking, documentation, and progress monitoring analysis for students. Includes reporting.
- **BehaviorPlus™**: Module that allows for the creation, tracking and modification of documentation of challenging student behaviors within the frameworks of Response to Intervention and Positive Behavioral Interventions and Supports, including benchmark screening, incident tracking, FBAs, behavior improvement plans, and monitoring. Includes reporting.

OK EDPLAN™ SYSTEM OVERVIEW

OK EdPlan™ will enable you to have comprehensive electronic student files giving you valuable information in a matter of a few clicks of the mouse. Using the OK EdPlan™ internet-based solution to complete student IEPs may be new to users but we feel that its process is similar to using a digital camera as depicted below.

In EdPlan™, Data is entered into the system through a series of "tabs" that relate to the respective IEP sections. Once the data has been entered, EdPlan™ takes a 'snapshot' of the data and creates a viewable .pdf IEP document that is stored in the student's electronic file. As in a digital camera, you are able to view a 'snapshot' of the picture you took. If you want to change the picture, you are able to snap another picture until you have the 'snapshot' that you are looking for. [Draft] documents are stored for 30 days, while [Final] documents are stored permanently.

	Tool of the Trade	Take Picture	Re-take Picture	Final Framed Picture
Taking a Picture	Digital Camera	First Picture Missing a Person	Second Picture Someone's Not Smiling	Completed Picture
Creating an IEP	Tool of the Trade	IEP Draft 1	IEP Draft 2	Finalized Sign IEP
	Computer with EdPlan™	First Draft Missing Data	Second Draft Incorrect Data	Completed IEP

Creating an IEP in Subsequent Years

The following diagram illustrates the steps of OK EdPlan™ and the benefit of the system in subsequent years. Once an IEP is created, the data is stored in the student's records. After the child's first IEP is created, creating an IEP in subsequent years (years 2 and beyond) is as simple as making updates/changes to the data and creating a new document 'snapshot'.
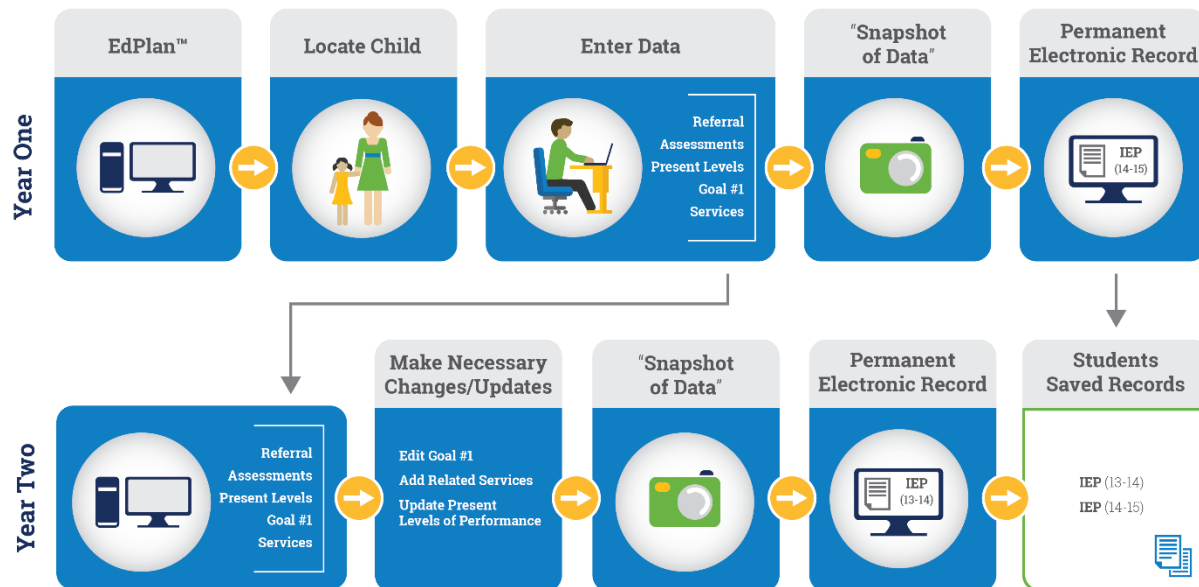
EDPLAN™ GENERAL INFORMATION

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.**
- **Do not save your password within your browser.**

*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 primary use the "Students" tab to complete work while Administrators will primarily use the Administrator tab.
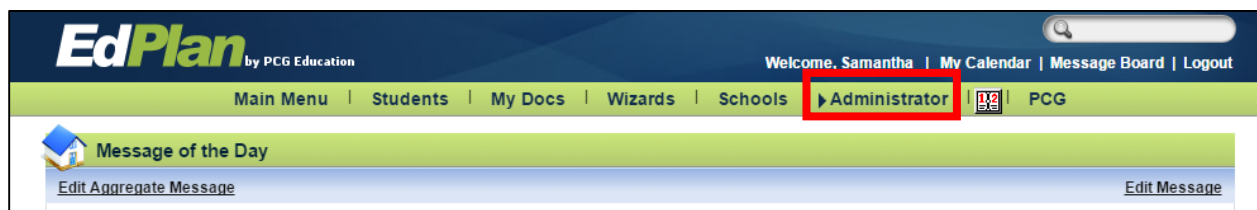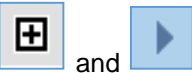
Saving Changes

After a change is made it is very important to click either the 'Update the Database', 'Save', or 'Save and Continue' button at the bottom of each screen 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:

	Help: This link shows general help information. See the End User Manual for updated, specific information.
	Drop down menu: Click on the arrow to make a selection. Only one selection can be made within this list.
	Check box: More than one selection can be made. To add or remove a check, click once on the box.
and	*Expand/Collapse:* Click either of these buttons to view an expanded list of options to view/select.
	Spell Check icon: Click on the icon to launch the spell check function for a specific textbox.
	Calendar icon: To add a date, click on the calendar and scroll through the screens to find the appropriate date.

Logging into the System
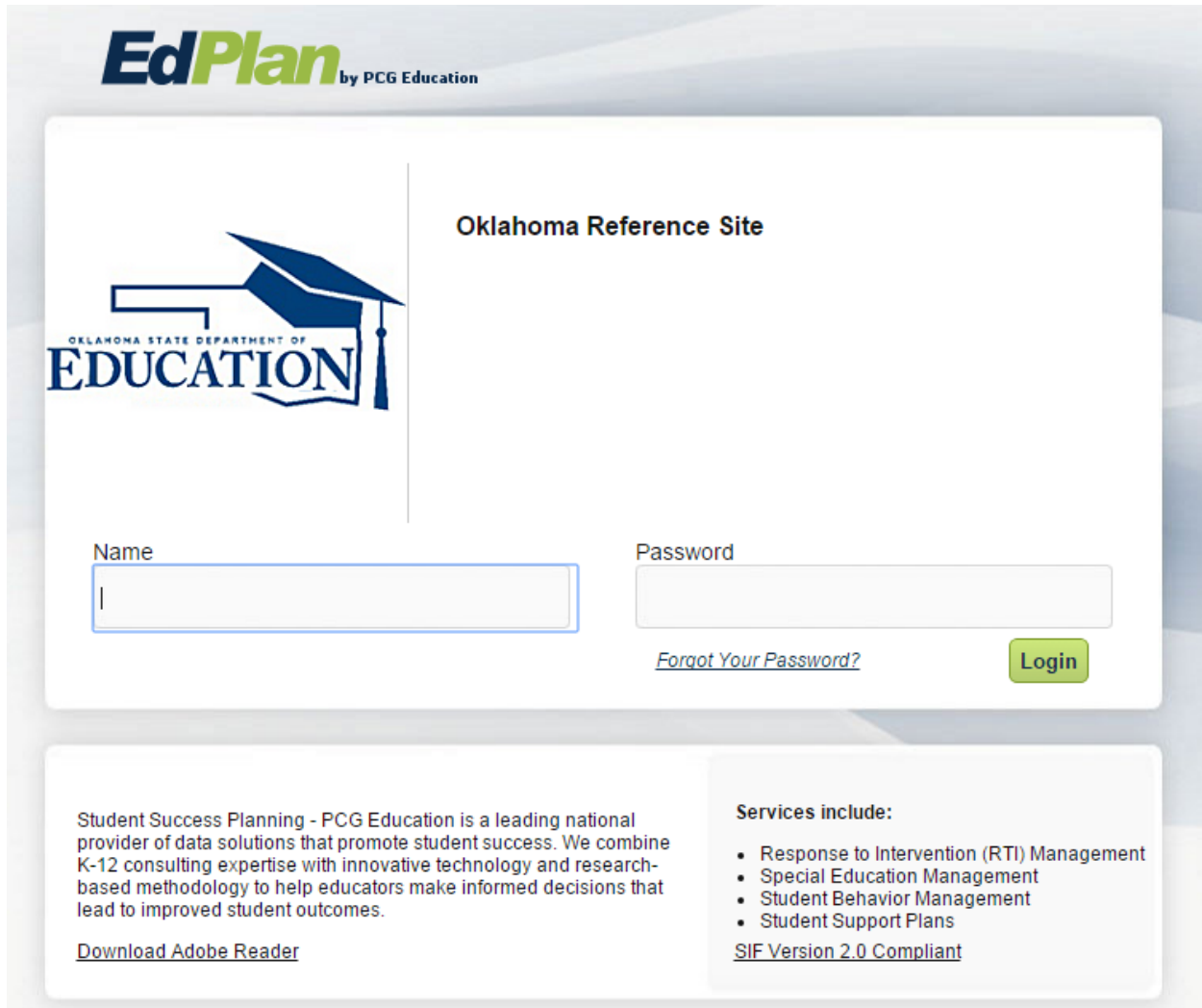
1. Open a web browser and enter your district's URL in the address bar. We recommend that you save this to your "favorites" or add a short-cut link to your desk top.
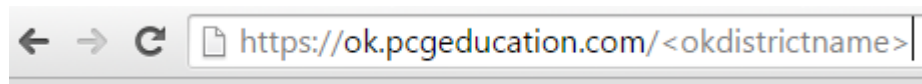
My URL is: https://ok.pcgeducation.com/okdistrictsiteiep

2. Enter your username: (First Name <space> Last Name) not case sensitive.
3. Enter your password. (see Password Requirements that follows)
4. 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 passwords
- 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.
- Must not match the last 3 passwords the User selected
- Password expires every 90 days
- Forgotten password link for Users, with CAPTCHA option (only available if the User forgets password)

NOTE: Do not leave your password for others to see or select 'Yes' in the checkbox to respond to the question "Would you like the browser to remember this password?"

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.

Public Consulting Group, Inc.
Electronic End-User Agreement
PCG Licensed Products

NOTICE TO END-USER: BY SELECTING "I AGREE" BELOW, YOU AGREE TO ALL OF THE REPRESENTATIONS AND TERMS SET FORTH BELOW.

Johnson County Schools ("the School System") has purchased a license to use a Public Consulting Group, Inc. ("PCG") electronic software product subject to the provisions of a licensing agreement between the School System and PCG ("the PCG Licensed Product"). (PCG Licensed Products include, but are not limited to: BehaviorPlus™, ClassroomTrac™, EasyIEP™, and EasyTrac™.)

You, the End-User of the PCG Licensed Product, represent and agree as follows:

1. You are an employee of the School System and you are authorized by the School System to use the PCG Licensed Product.

2. You will use the PCG Licensed Product only for authorized School System purposes, at locations authorized by School System.

3. You will not share your password with any other person, and will change your password as may be required by PCG or School System.

4. You will not access or attempt to access the PCG Licensed Product software that is not intended for user access, and will not copy, transfer, reverse engineer, disassemble, decompile, distribute, modify, translate, or create derivative works of the PCG Licensed Product software or any part of the PCG Licensed Product software.

5. You acknowledge that the PCG Licensed Product is the property of PCG and is protected by copyright, trade secret and contract laws.

Agree   Don't Agree

Note: Clicking on "Don't Agree" will log you out
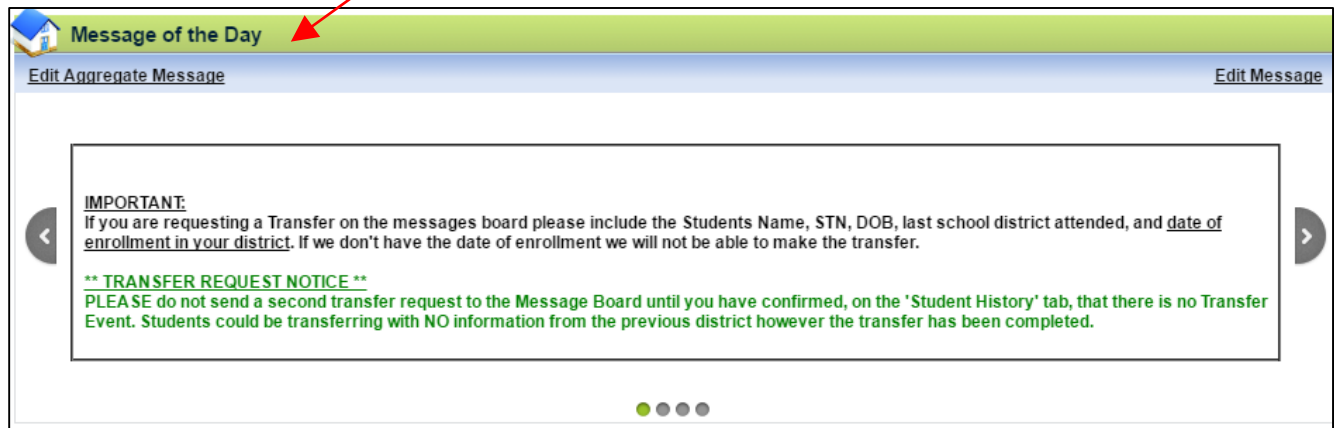
MAIN MENU TAB

Message of the Day

At the top of the "Main Menu" page you will find the 'Message of the Day' scrolling message bar. This is used to alert users of any important information. Please check this message each time you log in to stay informed with district-wide changes or updates. To edit the 'Message of the Day,' select the 'Edit Message' link:
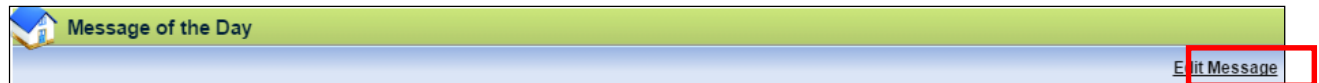
All messages are in HTML format. You can use the following information to personalize your messages.

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> </H1> First level heading. Large text.
- <H2> </H2> Second level heading. Smaller text.
- <H*> </H*> Successive levels where * is a number. The larger the number the smaller the text.
- <P> </P> Paragraph tag. Used for paragraphs. Uses browser defined paragraph style.
-
 New line. Inserts a new line character.
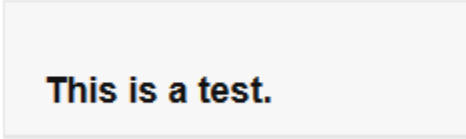
Example:
<h1> This is a test. </h1>
The example above will print the text "This is a test." in large text in the Message of the Day area.

This is a test.

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:
<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>

This is a test.

This is a test.

This is a test.

Edit Message

Color

The color tag will allow you to add color to your test 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:
<H2> <FONT COLOR="RED" > This is a Test. </FONT></H2>
<H2> <FONT COLOR="green" > This is a Test. </FONT></H2>

> **This is a Test.**
>
> **This is a Test.**
>
> Edit Message

Bold

The bold tag will allow you to bold items in the MOTD area.
   1. <B> </B>

Example
<P ALIGN="center"> This is a <B>test</B>. </P>
In this example, the word "test" will be bold.

> This is a **test**.
>
> Edit Message

Italics

The italics tag will allow you to create italics font in the MOTD area.
   2. <I> </I>

Example
<P ALIGN="center"> This is a <I>test</I>. </P>

> This is a *test*.
>
> Edit Message

An example of a complex message:

<h1 ALIGN="center"> All Case Managers read the message below. <h1>
<h3 ALIGN="left"> You <i>MUST</i> review you caseload by the end of the week and email any problems to your building supervisor.</h3>

All Case Managers read the message below.

You *MUST* review you caseload by the end of the week and email any problems to your building supervisor.

[Edit 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:

My Messages
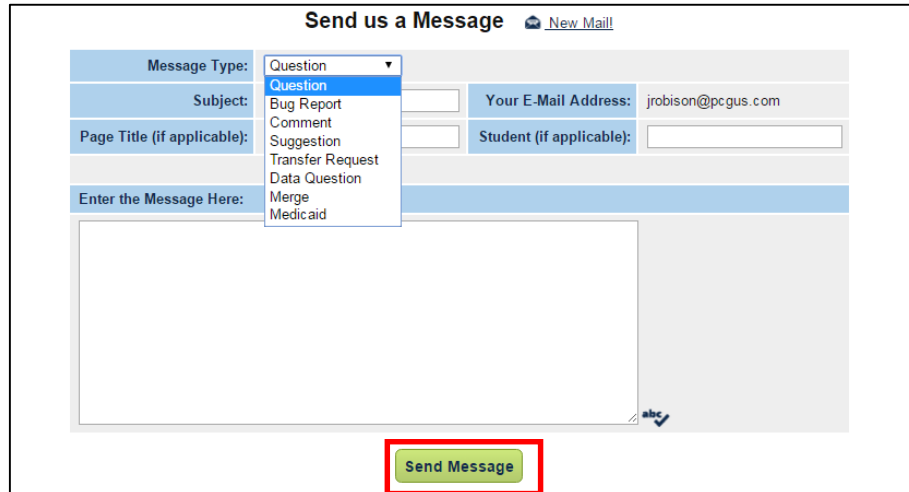
New Messages   [Send Message]   View All Messages

You Have No New Messages

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.
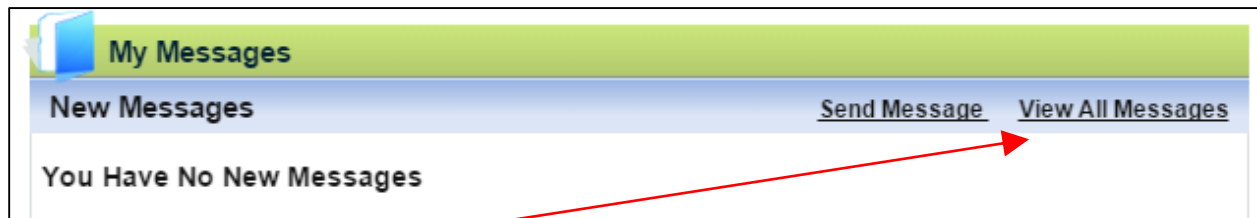
If you would like to review a message that you have already read in the system you will click on the 'View All Messages' link on the "Main Menu" within the 'My Messages' widget. Choosing either link will direct users to the following screen, displaying 'New Messages,' as well as storing a user's 'Previous Messages.'

Once you have read all new messages, you will no longer see the 'New Mail' icon on any screen.

UPLOADED FILES

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 'Upload File(s)' button.
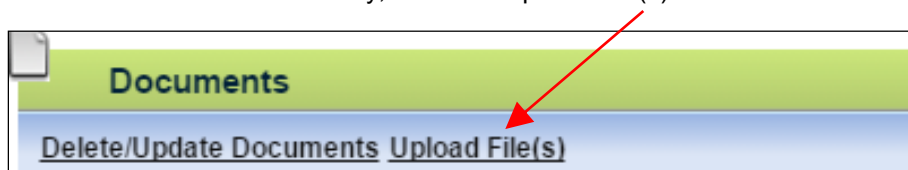
- On the next screen, click the 'Choose File' button to locate the file on your computer.

- 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.

Upload File to system

okrefiep

📧 New Mail!

Use this section to upload files for other users to view and/or print

File to Upload:	Choose File No file chosen	
Label (optional):		(if Label is empty, filename will be displayed)
Existing File to Replace:	▼	(to replace an existing Uploaded File)
File Category (optional):	▼	

STUDENTS TAB

Student Overview

When searching for students, remember that EdPlan™ receives demographic information from the WAVE system for all students through your district's SIS (student information system). 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.

1. From the "Main Menu," click the "Students" tab.

Main Menu | **Students** | **My Calendar** | **My Docs** | **My Reports** | **Wizards** | ▸ Administrator | **My Info** | 🔢 | **PCG**

2. Enter the criteria you wish to search by, such as 'Student Last Name.'

3. <u>Advanced Student Search Page</u>: Select the 'Advanced Student Search' button at the bottom of the "Students" tab/page. Use the "Advanced Student Search" page to search for Students by compliance status, disability, special education, or related services (among other options).

		Compliant	Warning	Overdue
Compliance Status:	Referral	✔ ☐	ⓡ ☐	🔴R ☐
	Parent Consent	✔ ☐	ⓟ ☐	🔴P ☐
	Eligibility	✔ ☐	ⓣ ☐	🔴T ☐
	IEP	✔ ☐	⚠ ☐	🔴 ☐
	ISP	✔ ☐	⚠ ☐	🔴 ☐
	Section 504 Parent Consent	5 ☐	ⓢₚ ☐	🔴SP ☐
	Section 504 Eligibility	5 ☐	ⓢₜ ☐	🔴ST ☐
	Section 504 Plan	5 ☐	ⓢₒ₄ ☐	🔴₅₀₄ ☐

Case Manager:	☐ Only include Students with no Teacher of Record

Disabilities:

Check All   Check None

☐ Autism   ☐ Intellectually Disabled   ☐ Specific Learning Disability
☐ Deaf-Blindness   ☐ Multiple Disabilities   ☐ Speech or Language Impairment
☐ Developmentally Delayed ☐ Orthopedic Impairment   ☐ Traumatic Brain Injury
☐ Emotional Disturbance ☐ Other Health Impairments   ☐ Visual Impairment (including Blindness)
☐ Hearing Impairment (including Deafness)

Placement:	▼
Specialized Transportation:	▼

Special Ed Services:

Check All   Check None

☐ Adaptive Behaviors   ☐ Math Calculation   ☐ Reading Fluency
☐ Adaptive PE   ☐ Math Problem Solving   ☐ Speech
☐ Basic Reading Skills ☐ Oral Expression   ☐ Vocational
☐ Language   ☐ Reading Comprehension   ☐ Written Expression
☐ Listening Comprehension

Related Services:

Check All   Check None

☐ Audiology   ☐ Orientation and Mobility Services   ☐ School Health Services
☐ Counseling Services   ☐ Parent Counseling and Training Services ☐ School Nurse Services
☐ Early Identification & Assessment Services ☐ Physical Therapy Services   ☐ Social Work Services
☐ Interpreting Services   ☐ Psychological Services   ☐ Speech-Language Pathology Services
☐ Medical Services   ☐ Recreation Services   ☐ Transportation Services
☐ Occupational Therapy Services   ☐ Rehabilitation Counseling Services

Serving School:	▼
Extended School Year:	☐ Only include Students with at least one service marked as ESY
Next School:	▼
Sort List By:	Student's Last Name ▼

☐ Open Results in a New Window

View Students

Display Previous Search Results

View My Caseload

4. After searching for a student, the student's record will appear if that student fits the entered criteria.
5. To select a specific student record, click on the name of the student.
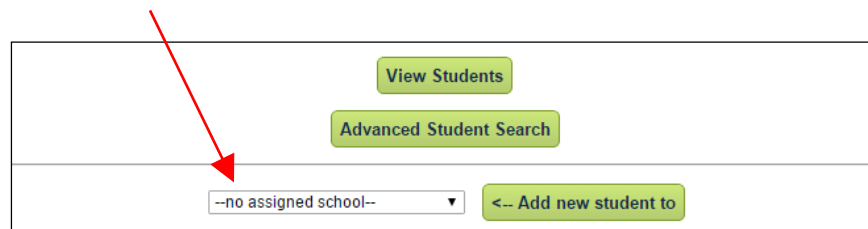
Add a New Student

Only a small number of users will be able to manually enter students into the EdPlan™ system. This assists with data cleanliness as well as the ability to prevent duplication of records in the EdPlan™ system. The most common students that will be entered manually will be those students who are transitioning to EdPlan™ from Sooner Start or students that have been referred from private school settings.

1. From the "Main Menu," click the "Students" tab.
2. At the bottom of the page, choose a school from the dropdown menu next to the 'Add new student to' button.
3. After selecting a school, click the 'Add new student to' button

4. Enter all of the student's information. 'First Name', 'Last Name', 'Date of Birth', 'STN', 'Race', 'Gender', and 'School' are all required.
5. Type the information into the blank textboxes and select information from the dropdown menus when applicable.
6. After you have entered all of the information, click the 'Add Student to Database' button.
7. To add another student, click the 'Add Student to Database, then add another' button.

Add New Student

Name:	First	Middle	Last	Suffix			
Student ID:					Soc Sec Number:		
State Testing Number (STN):							
Date of Birth:	📅				Place of Birth:		
Gender:	▼				Prim. Language:	-unknown- ▼	
Grade:	-none- ▼				Language of Instruction:	▼	
School:	-none- ▼				Hispanic or Latino Ethnicity:	No ▼	
Length of School Week:	▼ (leave empty if attends a standard School day)				Race:	☐ White ☐ Black or African American ☐ Asian ☐ American Indian or Alaska Native ☐ Native Hawaiian or Other Pacific Islander	

Parental Information

Parents:	
Relationship:	Both Parents ▼
Address:	
City, State, Zip Code:	
	☑ Student Lives Here
E-Mail:	
Home Phone:	
(Note: For consistency, if both parents work, enter the father's work phone number first, and the mother's second)	
Work Phone:	
	☑ Include on IEP Team ☐ Include on Section504 Team
Comments:	

Inactivate a Student

Students will only be inactivated through this screen if they have physically exited your school district.

1. From the "Main Menu," click the "Students" tab.
2. Search for a student and click on his/her name.
3. Click on the 'Make this Student Inactive' button at the bottom of the "Personal" page.

4. The following screen will appear:

5. Fill out the 'Exit Questionnaire' for the student.
6. Click the 'Save and Continue' button when finished.

Reactivate a Student

1. From the "Main Menu," click the "School System" tab.
2. Click the "Inactive Students" button.
3. Fill in the criteria to search for an inactive student.
4. Click the 'View Inactive Students' button.

5. Select the student to reactivate by clicking on his/her name.
6. Click the 'Re-Activate this Student in the Database' button.

Student Compliance Overview

Every student in EdPlan™ has a compliance symbol associated with their name. The compliance symbol can be found in: the "Select a Student" page, "Eligibility Process" tab, and "Student History" for that student. In all locations, the compliance symbols are found next to the student's name. When viewing your caseload, the compliance symbols are a quick way for you to see which students are in or out of compliance, as well as students who have approaching deadlines. You will see 3 compliance symbols unless the student is 504 and then you will on see two. The three compliance symbols represent Elig, IEP, and Early Childhood.

Definitions of compliance symbols are on the next page.

Definitions of compliance symbols

Symbol	Meaning	What to do
	It has been > 1095 days (3 years) since this student's Eligibility Date. A triennial re-evaluation is due.	When a re-evaluation is performed, you should update the student Eligibility Date. You can do that on the student's Eligibility page.
	It has been > 1035 days since this student's Eligibility Date. A triennial re-evaluation is due within 2 months.	Same as above.
	Either 1) it has been > 365 days since this student's Last IEP Date, or 2) it has been > 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).	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.
	Either 1) it has been > 335 days since this student's Last IEP Date, or 2) it has been > 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).	Same as above.
	It has been > 97 days since this student's Referral Date and Eligibility has not yet been determined.	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.
	It has been > 77 days since this student's Referral Date and Eligibility has not yet been determined.	Same as above.
	All appropriate Eligibility and IEP information has been entered for this student.	Make sure the student has a final IEP and option in the system.
	No Eligibility or IEP information has been entered for this student; this usually denotes a regular education student.	To enter the student into special education, fill in the Eligibility page.
	All appropriate Eligibility and 504 information has been entered for this student.	Make sure the student has a final Eligibility Report and 504 Service Plan in the system.
	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	Fill in the ECO exit information within the Early Childhood Data Collection.
	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.	Fill in the ECO exit information within the Early Childhood Data Collection.
	The student has recently transferred into this school system and will soon require that a new IEP / ISP / IFSP be written.	Make sure the student has a final IEP in the current district he/she is enrolled.

DELETING STUDENT DOCUMENTS AND EVENTS

Special Education Directors or EdPlan™ Administrators may have the permissions to delete student documents created in error. Documents may be deleted 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 deleted from the student's history page. Only documents or events within 365 days old may be deleted by the assigned district administrator.

Delete Documents from the Documents tab

Delete a document from the student's 'Documents' tab by simply checking the box under the 'Del' (delete) column and click 'Update the Database' button. You will be able to delete documents within this section that did not create an event within the 'Student History' page, including all draft documents. The red 'E' within the 'Del' column are the documents that created an event within the 'Student History' page.

Del	Doc ID	Date Generated	Document		Batch	Received	Del	Attachment	Date Received
☐	1643	06/08/2016	Written Notice to Parents	PDF	☐	(Draft)			
☐	1474	02/10/2016	Special Education Parent Consent	PDF	☐	☐			
E	1407	01/05/2016	OK Eligibility - MEEGS	PDF	☐	☐			
☐	1374	12/18/2015	Special Education Parent Consent	PDF	☐	☐			
☐	1373	12/18/2015	Special Education Parent Consent	PDF	☐	☐			
☐	1334	12/15/2015	Written Notice to Parents	PDF	☐	☐			
☐	1332	12/15/2015	OK - Meeting Invitation	PDF	☐	☐			
E	1306	12/01/2015	OK Eligibility - RED	PDF	☐	☐			
E	1169	11/03/2015	OK Eligibility - RED	PDF	☐	☐			

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 365 days can be deleted by the district administrator. Events from previous years should not be deleted from the Student History unless they are incorrect. It is important to keep previous events in the Student's History.

Deleting Events

Delete an event from the student history page

Events are created when an IEP document is finalized, Eligibility Determination is finalized, there is a change in School/Grade level for the student, parent consent (REDS) is finalized, transfer is completed, or Early Childhood Environments are finalized. Draft documents do not appear on the Student History page. There are a few instances when an event is deleted 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 with the exception of IEP Addendums.
- There is a manual event in the Student History, meaning there is a not a final document associated with the IEP.
- There is an incorrect 'Event Date', 'Begin Date', or 'End Date.'

1. Check the 'Del' box next to the Events that need to be deleted.

2. Click 'Update the Database'.

Delete an IEP that has associated Progress Reports

If an IEP needs to be deleted and there are Progress Reports associated with the final IEP, the Progress Reports must be deleted 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 by using Paperclip, the upload feature within the student's 'Documents' tab.

1. Check the 'Del' box for all the Progress Reports that are associated to the IEP that needs to be deleted.

2. Click 'Update the Database'.
3. Check the 'Del' box for the IEP that needs to be deleted.

4. Click 'Update the Database'.

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 at one time.

From the Main Menu click the My Docs tab

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 a student(s). Clicking on the document name opens the document with Adobe Acrobat Reader.

Documents for Students of

This page lists documents you've created, or that were created by someone else for Students for whom you are the Teacher of Record, within the past year (including draft documents that have not expired), or a subset of those documents if the search page was used or if coming from the Progress Report Wizard. This page appears immediately after running the Progress Report Wizard, and can always be accessed by using the "My Docs" button in the menu above. To print a document, click on the "Document Type" entry in the list, then use the printer icon that appears in the toolbar that appears directly above the document itself.

Del	Date Created	Created By	Student	Batch	Document		Year / Report Pd	Received	Attachment	Date Received
E	06/20/2016	Jennifer Robison	Thatcher Test	☐	OK Eligibility - MEEGS	PDF		☐		
E	06/20/2016	Jennifer Robison	Thatcher Test	☐	OK Eligibility - RED	PDF		☐		
E	02/17/2016	Jennifer Robison	David Beckham Test	☐	504-Eligibility Report (Eligible)	PDF		☐		
E	02/17/2016	Jennifer Robison	Dolly Parton Test	☐	OK IEP	PDF		☐	Testing Document	02/18/2016
E	09/14/2015	Jennifer Robison	Sugar Ray Test	☐	OK Eligibility - MEEGS	PDF		☐		
☐	09/14/2015	Jennifer Robison	Brad Pitt Test	☐	OK Eligibility - RED	PDF		☐		

An 'E' in the 'Del' column indicates that the document is associated with an Event. A 'C' in the 'Del' column indicates that the document is associated with a Parent Contact. In either case, the document can't be deleted until the associated event or contact is deleted. An 'A' in the 'Del' column indicates that the document is associated with another Document and it will deleted when the associated document is deleted.

(6 Documents)

Update the Database

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.
3. Select the 'View Document Batch' button. The documents selected open as a single PDF file in Adobe.
4. To print selected documents, use the 'Print' icon on the Adobe toolbar.

WIZARD TAB

Wizards are tools used to simplify the process of creating the same document for multiple Students.

Caseload Administration Wizard

1. From the 'Main Menu' click the 'Wizards' tab.

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.

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.

Note: All district users can use the 'Caseload Setup Wizard' to change or update their own 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 will appear, asking for confirmation of the removal.

Confirm Removing All Students from Samantha Test's Caseload ✉ New Mail!

Do you, **Angela Test**, confirm that you wish to remove all Students from **Samantha Test**'s Caseload?

Yes, Remove All Students from Caseload   No, Do Not Remove All Students

Transfer/Copy Caseload

1. To transfer or copy a caseload, click on the 'Transfer/Copy Caseload to Another User' button.

Update the Database

Add More Students to Caseload

Remove All Students from Caseload

Transfer / Copy Caseload to Another User

Select a User

2. To copy a caseload select 'Copy' in the first dropdown and then select the User in the second dropdown. This allows administrators the ability to share caseloads with multiple team members without individually having to create a new caseload.

I want to [Copy ▼] **Samantha Test**'s Special Education Caseload to the following user: [▼]

Review Students and Continue

3. To transfer a caseload select 'Transfer' in the first dropdown and then select the User in the second dropdown. This allows administrators the ability to transfer a caseload from one person to another.

I want to [Transfer ▼] **Samantha Test**'s Special Education Caseload to the following user: [▼]

Review Students and Continue

Note: When Transfer is selected, the dropdown lists only shows Users with access to all the schools that Students on the source User's caseload attend.

4. Click the 'Review Students and Continue' button.

SCHOOLS TAB

Add a New School

1. From the 'Main Menu', click the 'Administrator' Tab and select the "Schools" option.
2. Select the 'Add new school' button at the bottom of the page.

<div align="center">

Add new school

</div>

3. Enter the school information and click 'Add School to Database.' The 'School Name,' 'Abbreviation,' 'School Code,' and 'Units Per Day' are required fields. The 'School Code' field is the state assigned school ID.

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 students within that school. Users will be able to view school specific information, including compliance by individual users and students.

To View School Compliance

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

3. 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 student history. This will also show you kids that have no casemanager assigned to them.

To Edit School Information or Delete a School

1. From the "Main Menu," click the "Schools" Tab.
2. Click on the name of the school you would like to edit details for (blue link).
3. Edit any incorrect information (including the 'Length of School Day').

Edit School Information   **Sample School**
                                                                   📧 New Mail!

School Name:	Sample School
Abbreviation:	SS
	☐ External School
External School System:	▼ (if an External School)
School Code:	SS
Type of School:	Elementary ▼
Length of School Day:	7.00 hours (Prev) [Inactive] ▼
Address:	Sample School Lane
City, State, ZipCode:	Sample OK
Phone Number:	
Fax Number:	
Caller ID:	
E-Mail Address:	

Update the Database

View School Changes

Delete this school from the database

4. Click the 'Update the Database' button.
5. To remove the school from EdPlan™, click 'Delete this school from the database.' The system will not allow you to delete a school until all students have been reassigned to other schools.

Calendar

A new District Calendar is essential for each school year. Follow the steps below for adding a new District Calendar in EasyIEP™.
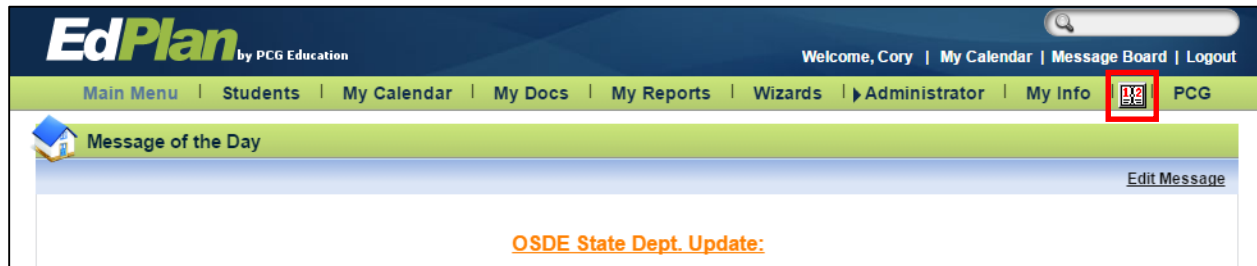
Add the new school year to the calendar. Click on the calendar icon on the main menu bar between the 'My Info' tab and the 'PCG' tab. Scroll to the bottom and click on the 'Edit School Years' button.
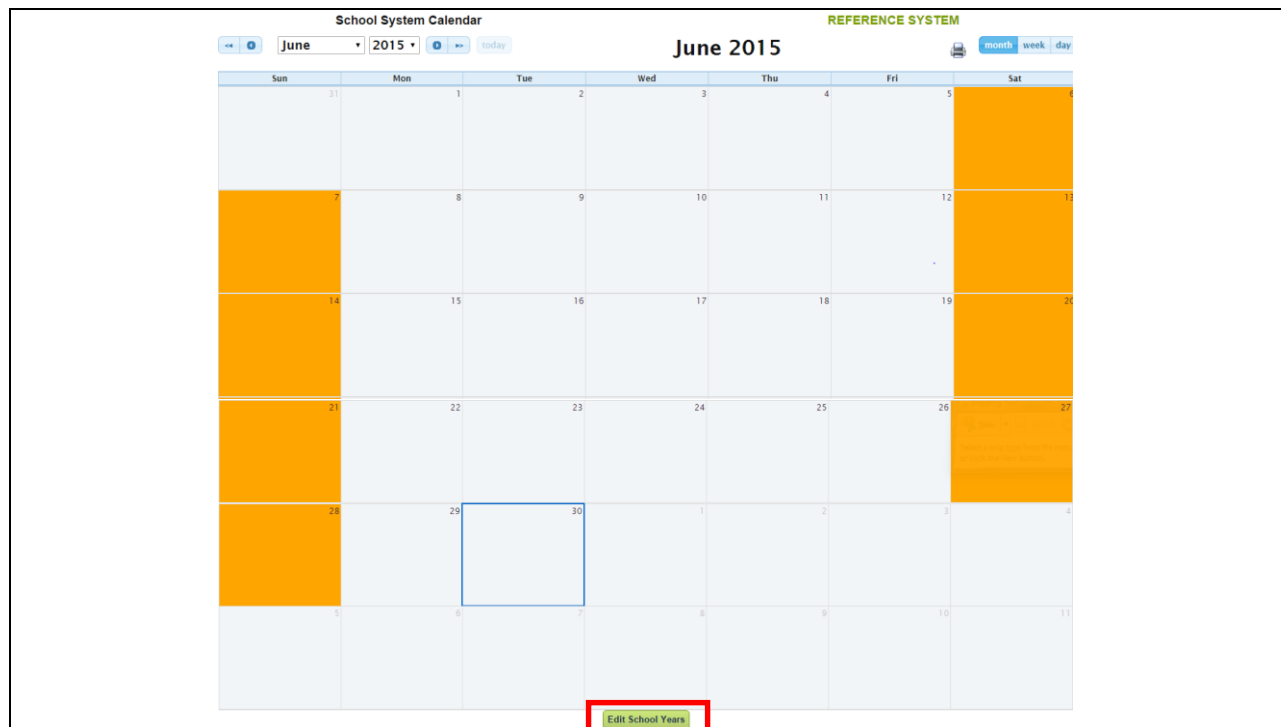
2. Scroll to the bottom and Click the 'Add next school year' button to add the new school year.

It is crucial to have at least three future calendar years is the list of school years. The future school years are used with the calculation of the 'Project 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.
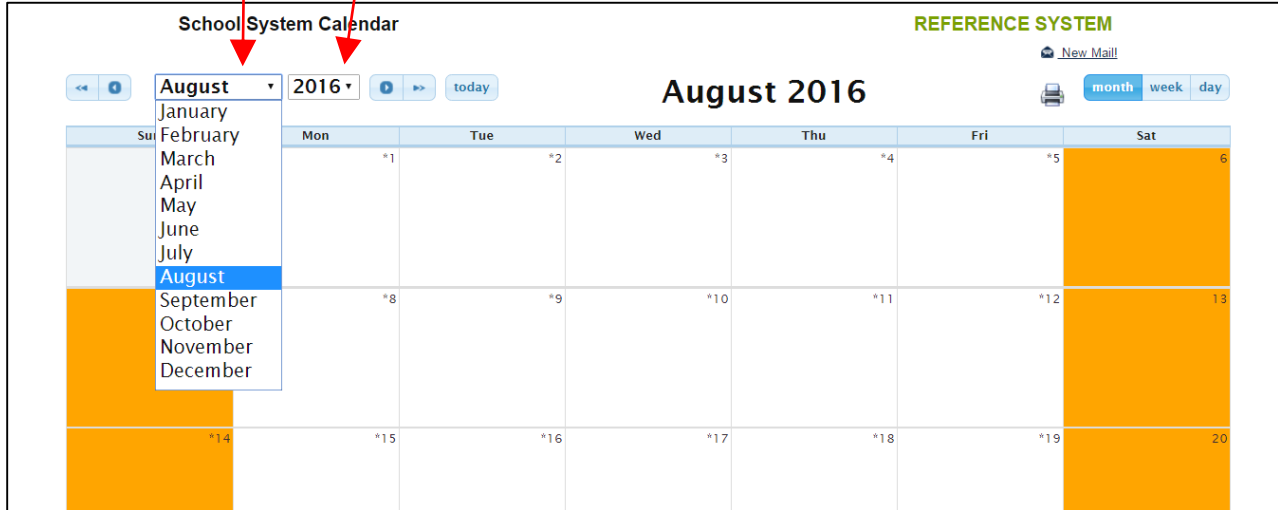
1. Enter the 'Begin Date' and 'End Date' for the new school year. Click on the calendar icon again to return to the 'Edit School Years' page. When the actual district calendar dates are determined by the school board, enter the first instructional date as the begin date for the current school year on the shool years page.

Updating the school year calendar dates on the 'Edit School Years' page sets all of the week days to

instructional school days (green). Additionally, the District needs to enter any noninstructional days and summer days.

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.

Level	Day Type	Label
School System	Holiday ▼	Labor Day

6. Click 'Update the Database' button.

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.

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 effects 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 between the 'My Info' tab and the 'PCG' tab. 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.

3. Scroll down and click the 'Auto-fill Begin and End Dates' button or define periods by entering specific 'Begin and End Dates'. Clicking the Update the Database button saves the report periods and updates the 'Cal Days' and 'Sch Days' fields.

Custom Calendars
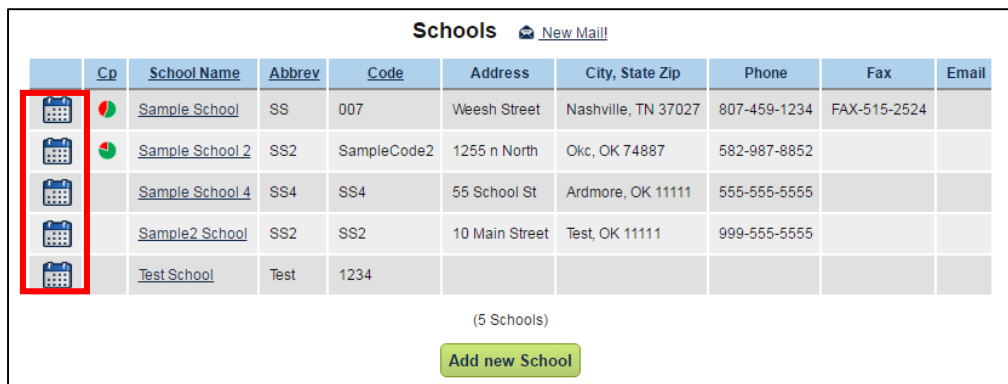
If your district has any schools with a different school day calendar than the rest of the district, create a custom calendar for that school.

1. Select the 'Schools' tab under 'Administrator' tab.
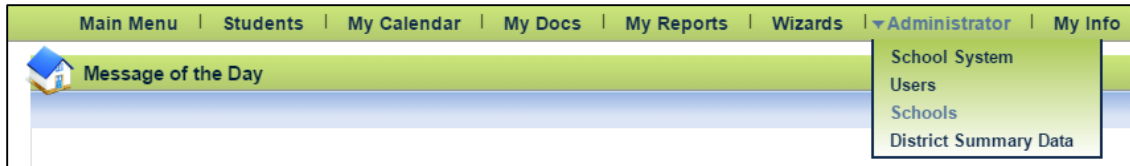
2. Click on the calendar icon beside the school. Follow the same steps to add the calendar days as above in the 'Calendar' section. Do not add custom progress reporting periods to this calendar, only add the progress reporting periods to the district calendar.

ADMINISTRATOR TAB

School System
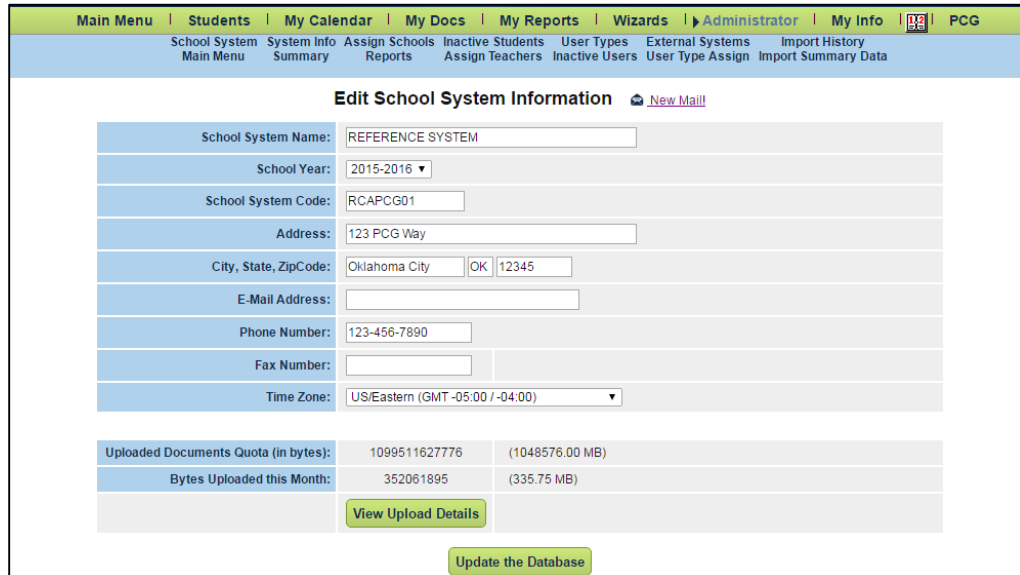
The School System information is entered by an EdPlan™ Administrator.

1. Click on the 'Administrator' Tab.
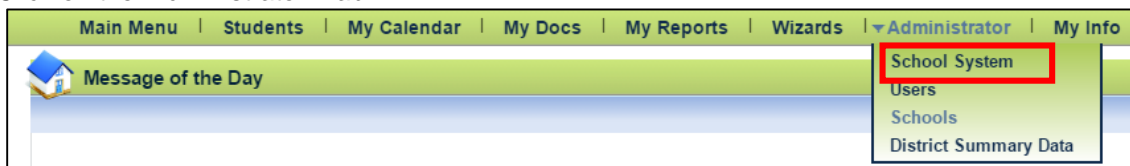
2. Click on the 'School System' Tab to get to the 'Edit School System Information' page.
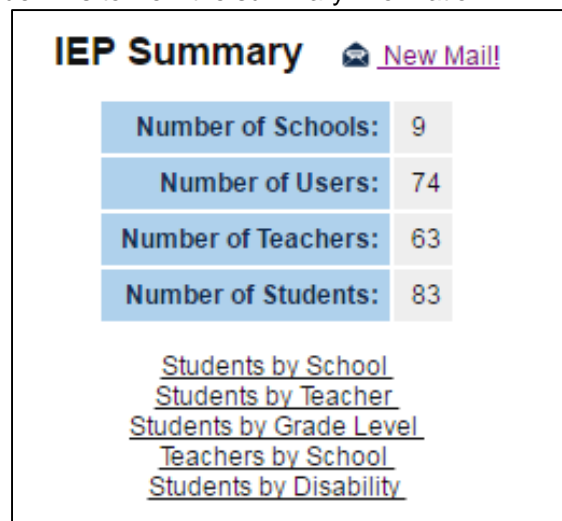
Summary

The summary page gives an overview of the District's information in EdPlan™.

1. Click on the 'Administrator' tab. Then, click on the 'School System' tab to click on the 'Summary' tab.

2. Click on the individual blue links to view the summary information.

REPORTS

From the 'Reports' tab; General, Local, 504, Misc., and State reports are available.

1. Click on the 'School System' tab under the 'Administrator' tab.
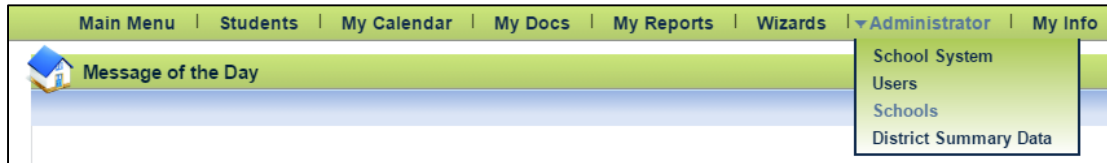
2. Click on the 'Reports' tab.

3. Click the appropriate report needed. Please review the reports tab for a full listing of all reports available.
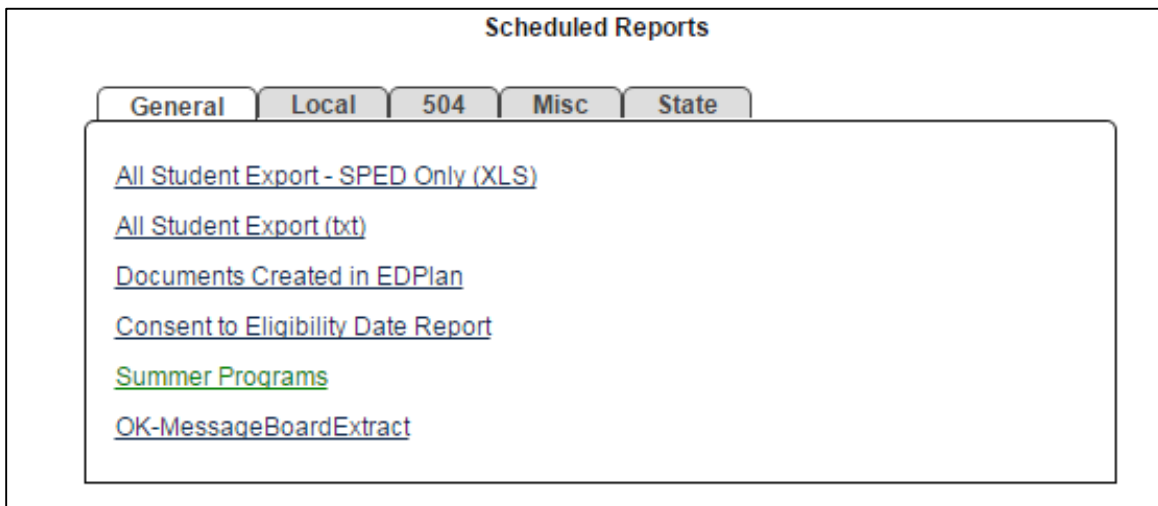
Keep and Rename Reports

This feature allows specific users the permission to mark reports for permanent retention and assigning custom names to individual reports.
1. Access the reports page via 'School System' and '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.

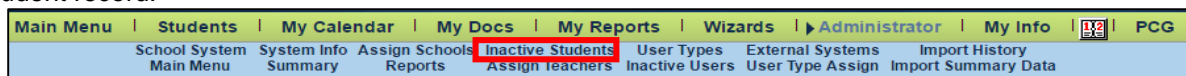| Date Generated	Created By	Report Type	Expiration Date	Keep	Custom Name
07/21/2016 11:53:00	Samantha Test	Projected IEP Meetings (PDF)	08/20/2016		
07/21/2016 11:51:00	Samantha Test	Projected Eligibility Meetings (PDF)	08/20/2016		
07/21/2016 11:50:00	Samantha Test	Projected Eligibility Meetings (txt)	08/20/2016		
07/21/2016 11:36:00	Erik Friend	LRE, ECE, Disproportionality Report (TXT)	08/20/2016		
07/21/2016 11:34:00	Erik Friend	LRE, ECE, Disproportionality Report (TXT)	08/20/2016		
07/19/2016 12:38:00	Christian Kissinger	Duplicate Student Report (txt)	08/18/2016		
07/19/2016 12:31:00	Christian Kissinger	Summer Programs	08/18/2016	☐	
07/19/2016 12:22:00	Christian Kissinger	All Student Export - SPED Only (XLS)	08/18/2016		
07/14/2016 17:40:00	Alicia Smith	Table 5 Discipline DETAILS Report	08/13/2016		
07/14/2016 17:39:00	Alicia Smith	Table 5 Discipline DETAILS Report–PILOT	08/13/2016		
07/11/2016 13:34:00	Angela Kwok	Consent to Eligibility Date Report	08/10/2016	☐	
07/11/2016 13:29:00	Angela Kwok	Table 5 Discipline DETAILS Report–PILOT	08/10/2016		
07/05/2016 11:13:00	Shawna S Keene	Projected IEP Meetings (txt)	08/04/2016		
07/02/2016 00:52:00	Cameron Scott Lackey	Documents Created in EDPlan	08/01/2016		
07/01/2016 23:08:00	Cameron Scott Lackey	Recent Logins (TXT)	07/31/2016		

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.

Inactive Students

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

1. From the 'Administrator' tab select 'School System,' click on the 'Inactive Students' tab and search for a student record.

Main Menu	Students	My Calendar	My Docs	My Reports	Wizards	▶Administrator	My Info		PCG
	School System	System Info	Assign Schools	Inactive Students	User Types	External Systems	Import History		
	Main Menu	Summary	Reports	Assign Teachers	Inactive Users	User Type Assign	Import Summary Data		

2. Enter a student's last name and/or first name and click the 'View Inactive Students' button.

3. A list of students meeting the search criteria will display.

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

5. Click on the 'Details' button for additional information about each event.

STUDENT REACTIVATIONS

The 'Inactive Students' tab allows the reactivation of inactive student records. Students will be reactivated in their school during the automated transfer process based on re-enrollment.

When a student exits and re-enters a school system, the inactive record may be reactivated and a new IEP created. A new IEP must be finalized for the Student's record to remain compliant in the current school system. The new finalized IEP begin date must be on or after the reactivation date and is usually the same as the IEP services begin date. A new IEP normally covers a full year, yet the new IEP can cover the remaining months of the school year.

1. Click on the 'School System' tab under 'Administrator' and click on 'Inactive Students'.

2. Enter the student's information and click 'View Inactive Students'.

3. Click on the student's name.

Manage Inactive Students 📧 New Mail!

Student ID	State Testing Number (STN)	Name	Date of Birth	School	Date Exited	Reason for Exiting
6235623	AbeSTN	Abe Test	09/08/2010	SS	01/19/2016	Transfer to Another School System
5555	4444	bob test	07/20/2011	SS	09/17/2015	Transfer to Another School System
GT		Garrett Test	06/01/2012	SS	07/01/2015	Transfer to Another School System
JTTEST		Jim Thorpe Test	04/08/1998	SS	04/12/2016	Graduated with Diploma
KENNEDYSTN	KENNEDYID	Kennedy Test	07/01/2009	SS	07/25/2016	Graduated with Diploma
TESTID123	TESTSTN123	Toby F Test	12/15/2001	SS2	12/25/2015	Dropped Out of School

4. Enter a re-activation date and click 'Re-Activate this Student in the Database'.

| Main Menu | Students | My Calendar | My Docs | My Reports | Wizards | ▶ Administrator | My Info | 🔢 | PCG |

Log Out | Main Menu | Inactive Students | Exit Info | Student History | Post School Info | Documents

Exiting Student Information   **Kennedy Test**
📧 New Mail!

Date Exited: 07/25/2016 📅
Reason for Exiting: Graduated with Diploma ▼
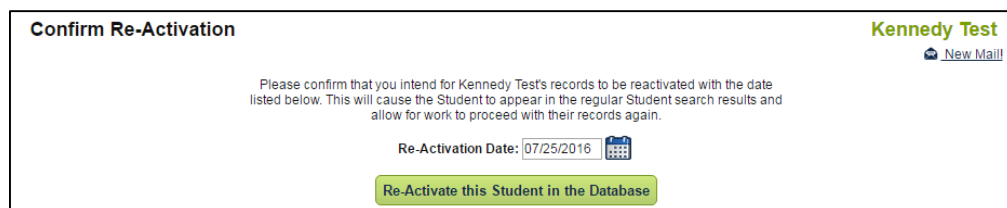
Update the Database

Re-Activation Date: 07/25/2016 📅
Re-Activate this Student in the Database

5. Confirm the reactivation.

Confirm Re-Activation   **Kennedy Test**
📧 New Mail!

Please confirm that you intend for Kennedy Test's records to be reactivated with the date
listed below. This will cause the Student to appear in the regular Student search results and
allow for work to proceed with their records again.

Re-Activation Date: 07/25/2016 📅
Re-Activate this Student in the Database

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 'School System' tab under 'Administrator' and click on user types.

2. Click on the user type to review the permissions.

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.
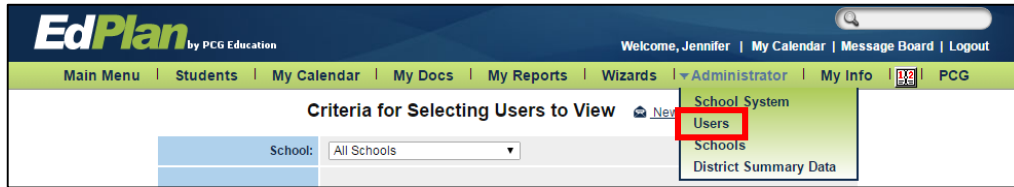

USERS TAB

Changing a User's Password and Updating their Personal Information

1. From the 'Main Menu,' click on the 'Administrator' tab and select 'User' from the dropdown.

2. Enter a user's last name or any other search criteria and click the 'View User(s)' button.

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. If you change a user's password make sure the user knows to immediately change their password again upon logging in.

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. Verify the correct user permission is selected due to accessibility to student information with different user types.

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 able 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.

Disability Certifications				
Disabilities:	**Can Provide**	**FTE**	**Certified**	**Certifications**
-Select One- (Select One)	☐			View
Autism (AUT)	☐			View
Blind (BL)	☐			View
Deaf-Blindness (DB)	☐			View
Deafness (DF)	☐			View
Developmental Delay (DD)	☐			View
Developmental Delay: Adaptive/Self Help (ASH)	☐			View
Developmental Delay: Cognitive Development (CD)	☐			View
Developmental Delay: Communication (CM)	☐			View
Developmental Delay: Physical Development (PS)	☐			View
Developmental Delay: Social-Emotional (SE)	☐			View
Emotional Disturbance (EMN)	☐			View
Functional Delay (FD)	☐			View

Adding New Users

1. To add a new user into EdPlan™, click the 'Add New User' button at the bottom of the "Users" tab under the 'Administrator' tab.

2. Enter a user's demographic information as outlined in numbers 4, 5, and 6 of the <u>Changing a User's Password and Updating Their Personal Information</u> 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.

*Note: PCG has created User Code's for the initial users imported into the system. Districts may elect to change this code to match the District's HR Employee ID if that is preferred.

Inactivating Users

1. Search for a user from the "Users" tab under the 'Administrator' tab.

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

Re-activating Users
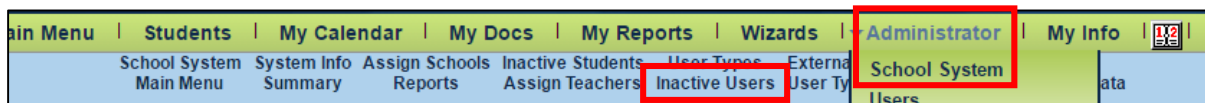
1. Under the 'Administrator' tab select 'School System" and 'Inactive Users'.

2. Search the 'User' in the 'Criteria for Selecting Inactive Students View'
3. Click 'View Inactive User'

4. Select the 'Users' name you would like to re-activate by clicking on the name.

5. Click the 'Re-Activate this User in the Database' button.

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 case manager'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.

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

MY INFO TAB

The first time you login to EdPlan™ you will need to change your password. Click on the <u>How to choose a good password</u> hyperlink if you need help. Passwords will need to be changed every 90 days.

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 'Update the Database' button to update the new information.

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™
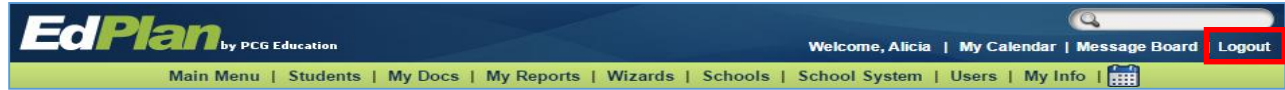
** Always Log Out and Exit the Browser **

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 "Log Out" button in the top right of the menu toolbar.
2. After you log out, close your browser:
   - 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

- EdPlan™ Help Desk for district administrators only: **_1-866-702-6489._**
- 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.
- Always 'Update the database'/'Save'/'Save and Continue' to save data entered.
- After 30 minutes of inactivity (inactivity = not clicking any buttons within EdPlan™) EdPlan™ will automatically log you off.
- When typing long quantities of notes (e.g. "Strengths/Needs, Special Factors, and Parent Concerns" page), save your data frequently.
- A finalized IEP document is required to create an IEP-At-a-Glance document and Progress Report.
- Do not use the back button on the browser tool bar, use only the 'Back' buttons within the EdPlan™ pages.
- Make sure each user has entered their email which will enable their use of the 'Forgotten Password' feature.