



# 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:

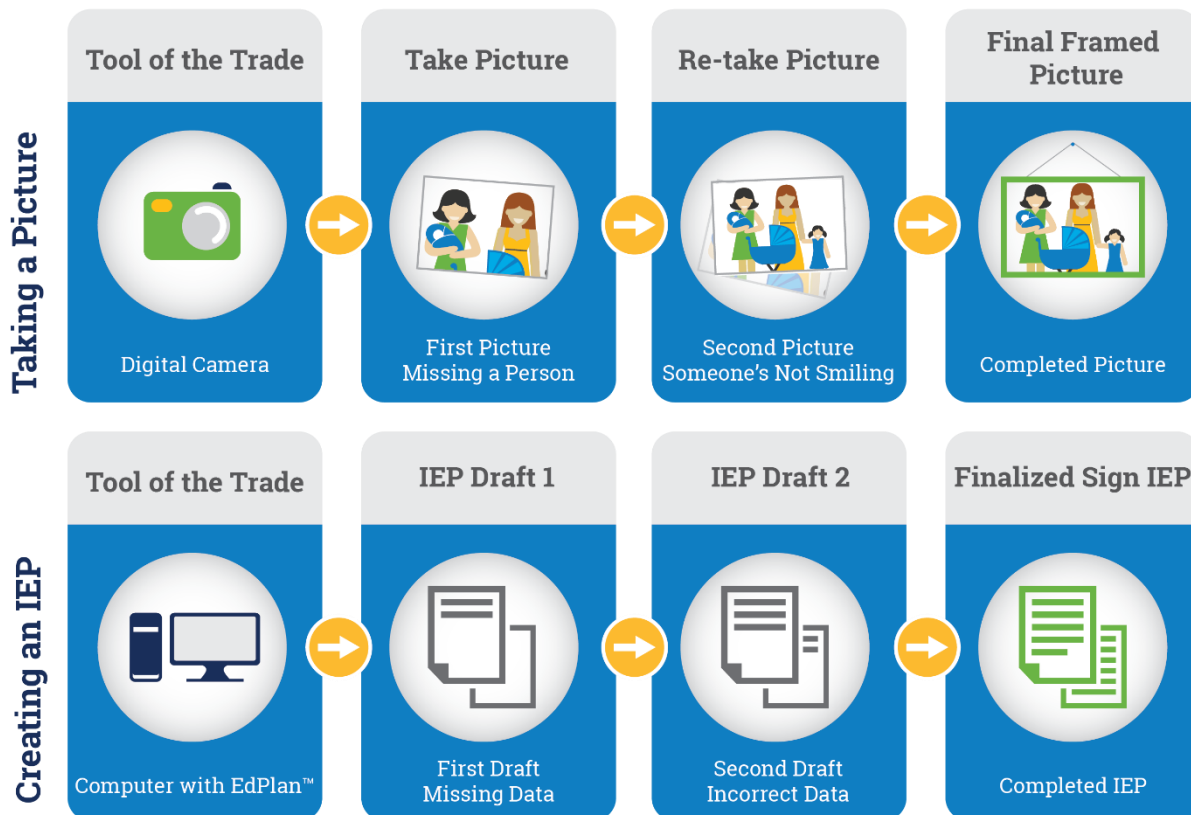
- **Special Education Consulting Services:** PCG offers comprehensive services and customized technology solutions to special education departments.
  - **EdPlan™ EasyIEP™** is an internet-based solution for the development of Individualized Education Program (IEPs) and for the management of special 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.

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### 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.

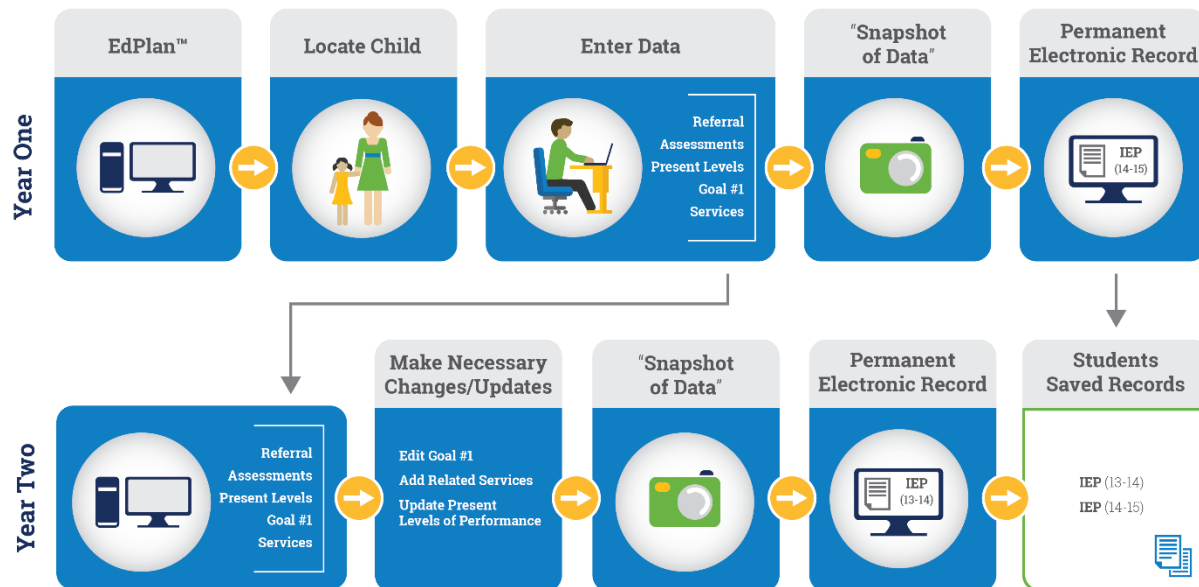
In EdPlan™, Data is entered into the system through a series of “tabs” that relate to the respective IEP sections. Once the data has been entered, EdPlan™ takes a ‘snapshot’ of the data and creates a viewable .pdf IEP document that is stored in the student’s electronic file. As in a digital camera, you 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.



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### 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'.



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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.**
- **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.**

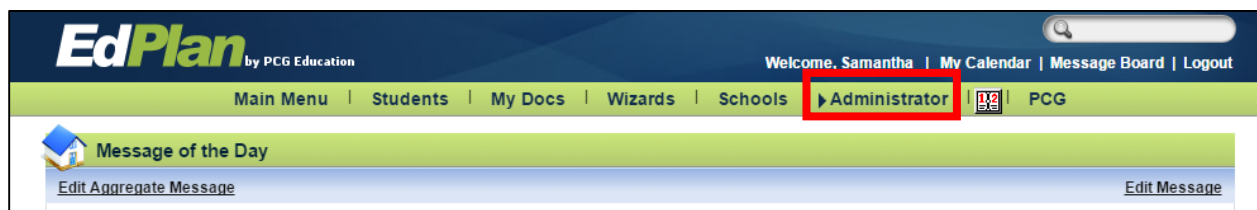
#### User Access and Permissions

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.





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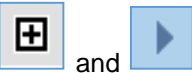


### Saving Changes

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.**



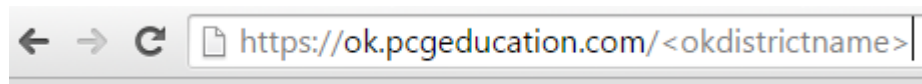
### Important Symbols in EdPlan™

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

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

### Logging into the System

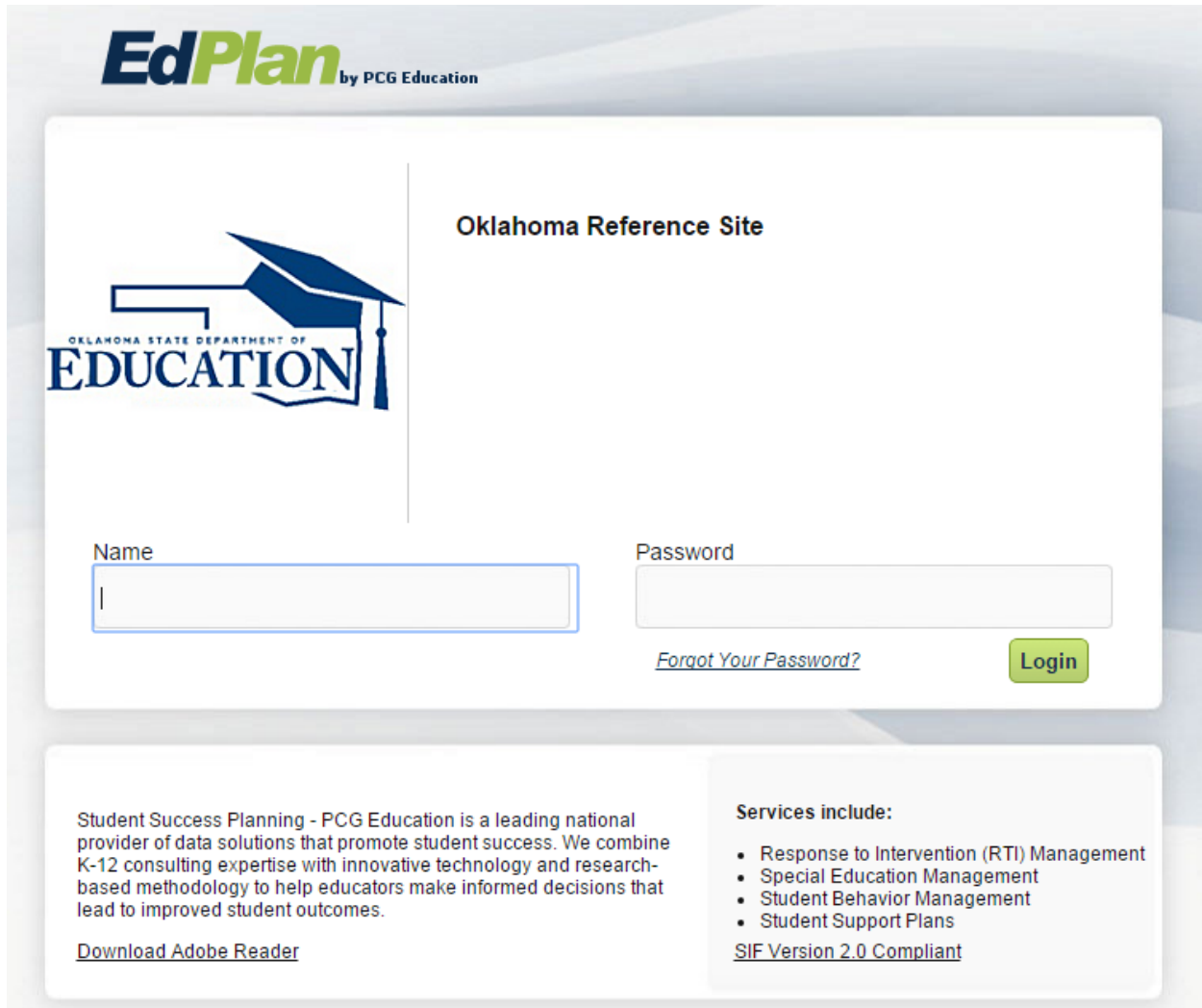
1. Open a web browser and enter your district's URL in the address bar. We recommend that you save this to your "favorites" or add a short-cut link to your desk top.



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.

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The screenshot shows the EdPlan login interface. At the top left is the EdPlan logo with the text "by PCG Education". The main heading is "Oklahoma Reference Site". On the left is the Oklahoma State Department of Education logo. Below the logo are two input fields: "Name" and "Password". To the right of the Password field is a link for "Forgot Your Password?" and a green "Login" button. Below the login fields, there are two columns of text. The left column describes Student Success Planning and includes a link to "Download Adobe Reader". The right column lists "Services include:" with a bulleted list: "Response to Intervention (RTI) Management", "Special Education Management", "Student Behavior Management", and "Student Support Plans", followed by a link for "SIF Version 2.0 Compliant".

**\*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

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- 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™.)

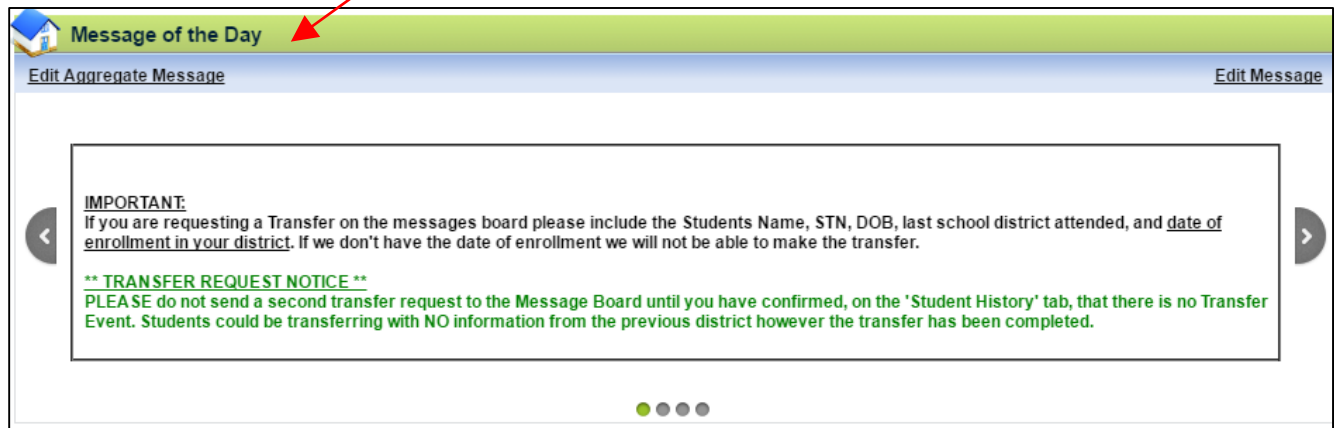
You, the End-User of the PCG Licensed Product, represent and agree as follows:

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.

**Note:** Clicking on "Don't Agree" will log you out

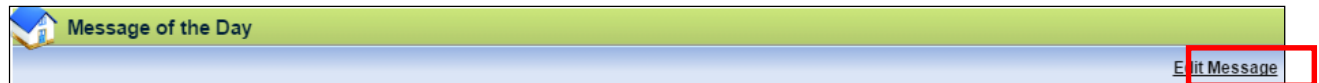
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### MAIN MENU TAB



### 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.

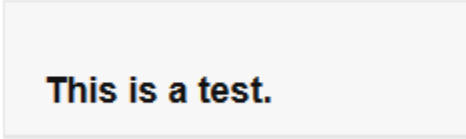
- <H2> </H2> Second level heading. Smaller text.
- <H\*> </H\*> Successive levels where \* is a number. The larger the number the smaller the text.
- <P> </P> Paragraph tag. Used for paragraphs. Uses browser defined paragraph style.
- <br> New line. Inserts a new line character.

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*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 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>`

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*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:

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<h1 ALIGN="center"> <font color="red"> All Case Managers read the message below.  
</font><h1><br><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**

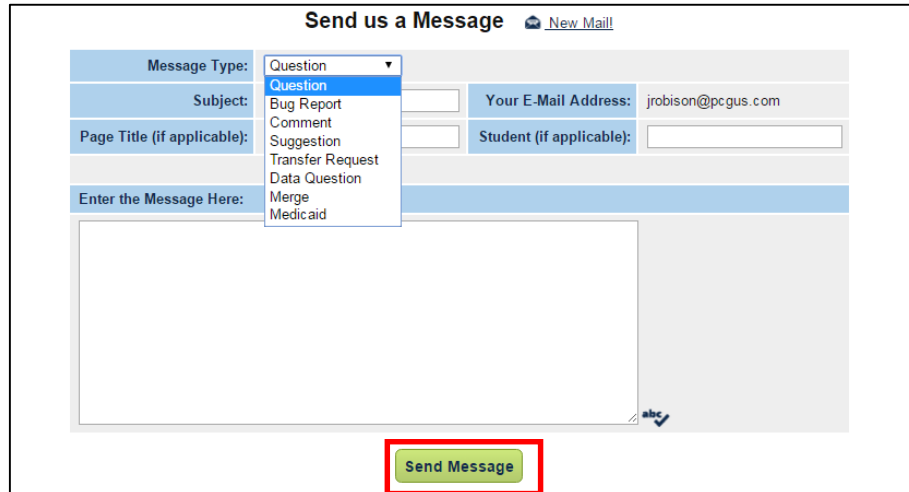
**New Messages** [Send Message](#) [View All Messages](#)

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.

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

Message Type:

Subject:

Page Title (if applicable):

Your E-Mail Address:

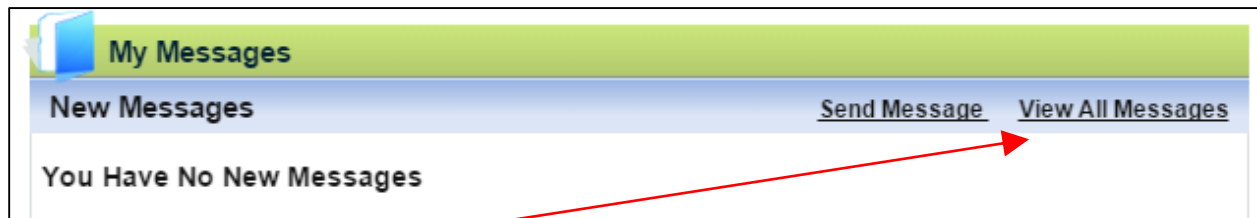
Student (if applicable):

Enter the Message Here:

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.’



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**Erin McAnulty**  
[New Mail](#)

This page displays all of the messages you have sent in the EasyIEP™ system and the responses that you have received. If you have messages you have not read, a "New Messages" section will appear at the top of the page. Below any new messages, a "Previous Messages" section will display all the messages that you have previously sent or received.

**New Messages**

Mark as Read?	From	Site	ID	Date	Message Type	Subject	Message	Age (hr:min)
<input type="checkbox"/> <span style="margin-left: 20px;"><a href="#">Check All</a></span> <span style="margin-left: 20px;"><a href="#">Check None</a></span>	Erin McAnulty	docsncalexander	616402	05/23/2014 14:24:00	Question	RE:	I have an answer	0:0-1

[Mark Messages as Read](#)

**Previous Messages**

From	Site	ID	Date	Message Type	Subject	Message	To	Site	Read?	Replied?	Age (hr:min)
Erin McAnulty	docsncalexander	616401	05/23/2014 14:23:00	Question		Please answer this question	Help Desk	Message Board	No	No	0:00
Erin McAnulty	docsncalexander	616400	05/23/2014 14:21:00	Question		I have a question.	Help Desk	Message Board	Yes	Yes	0:02

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™.

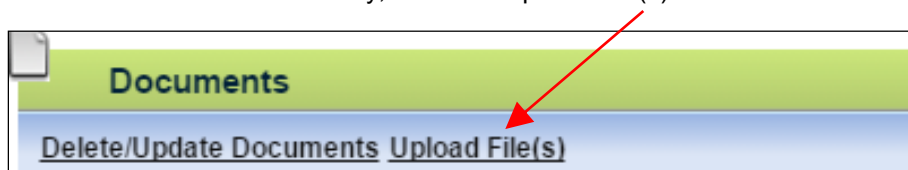
**Documents**

[Delete/Update Documents](#) [Upload File\(s\)](#) [Review the License Agreement](#)

Special Education | 504 | District | State | Help Links | SoonerCare (Medicaid-FFS)

Del	Pos	New Pos	File Type Category	Date Uploaded	Uploaded By	File Name
<input type="checkbox"/>	51	<input type="checkbox"/>	Special Education	08/21/2015	Angela Kwok	<a href="#">OSDE Form 01 Record of Access.pdf</a>
<input type="checkbox"/>	56	<input type="checkbox"/>	Special Education	08/04/2015	Samantha Law	<a href="#">Descriptions of Evaluation Procedures (Consent page 2)</a>
<input type="checkbox"/>	64	<input type="checkbox"/>	Special Education	07/06/2015	Samantha Law	<a href="#">OK Manifestation Determination</a>
<input type="checkbox"/>	68	<input type="checkbox"/>	Special Education	06/29/2015	Daniel Harris	<a href="#">Notification Regarding Lindsey Nicole Henry Scholarship A</a>

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.

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- 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:  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.



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

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### Criteria for Selecting Students to View

Grade Level:	All Grades ▼		
School:	All Schools ▼		
Student Last Name:	<input type="text"/>	<input type="checkbox"/> Exact Match	
Student First Name:	<input type="text"/>	<input type="checkbox"/> Exact Match	
Student Middle Name:	<input type="text"/>	<input type="checkbox"/> Exact Match	
STN:	<input type="text"/>	<input type="checkbox"/> Exact Match	
Student ID:	<input type="text"/>	<input type="checkbox"/> Exact Match	
Status:	<input type="checkbox"/> General Ed <input type="checkbox"/> Special Ed <input type="checkbox"/> Section 504 Referral <input type="checkbox"/> Child Study <input type="checkbox"/> IEP <input type="checkbox"/> Section 504 Eligible <input type="checkbox"/> Referral <input type="checkbox"/> ISP <input type="checkbox"/> Section 504 Plan <input type="checkbox"/> Eligibility <input type="checkbox"/> Discontinued		
Additional Program(s):	<input type="checkbox"/> Early Childhood Placement		
Sort List By:	Student's Last Name ▼		

View Students  
Advanced Student Search  
View My Caseload

--No Assigned School--    <-- Add new Student to

- Advanced Student Search Page:** 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).

### Criteria for Selecting Students to View

Search for Students using the information from the Current IEP rather than the Workspace  
NOTE: School and Grade will be based upon current Student information when searching.

Grade Level:	All Grades ▼		
School:	All Schools ▼		
Student Last Name:	<input type="text"/>	<input type="checkbox"/> Exact Match	
Student First Name:	<input type="text"/>	<input type="checkbox"/> Exact Match	
Student Middle Name:	<input type="text"/>	<input type="checkbox"/> Exact Match	
Student ID:	<input type="text"/>	<input type="checkbox"/> Exact Match	
State Testing Number:	<input type="text"/>	<input type="checkbox"/> Exact Match	
Status:	<div style="display: flex; justify-content: space-between; align-items: center;"> <span><span style="background-color: #92d050; padding: 2px 5px;">Check All</span> <span style="background-color: #92d050; padding: 2px 5px;">Check None</span></span> <span style="font-size: 1.2em;">⊞</span> </div> <input type="checkbox"/> General Ed <input type="checkbox"/> Eligibility <input type="checkbox"/> IEP <input type="checkbox"/> Child Study <input type="checkbox"/> Special Ed <input type="checkbox"/> Discontinued <input type="checkbox"/> Referral		

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	Compliant	Warning	Overdue
Referral	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent Consent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eligibility	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IEP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ISP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Section 504 Parent Consent	5 <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Section 504 Eligibility	5 <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Section 504 Plan	5 <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Case Manager:  Only include Students with no Teacher of Record

Disabilities:  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:  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:  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:

Open Results in a New Window

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.

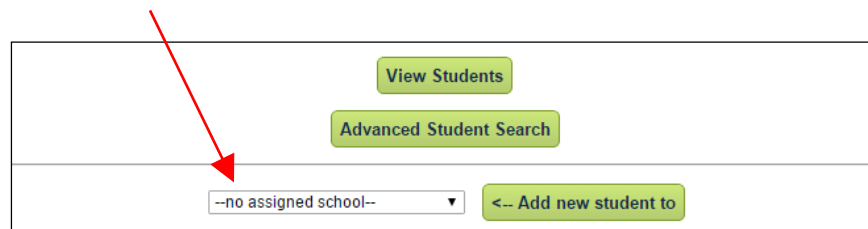
## OK EdPlan™ - Administrator's Manual

Select a Student <a href="#">New Mail</a>												
IEP/IFSP/ISP	504	STN Number	Local ID	Name	Age	Grade	School	Case Manager	Disability	Elig Due	IEP Due	504 Due
●		STU38JHE		<u>Kenzi Rae Test</u>	3 Years	3	SS		ASH	04/02/2015		
✓		TESTLAURA		<u>Laura Test</u>	14 Years	8	SS			10/22/2017		
✓		TEST055555	TEST055555	<u>Marqe Test</u>	11 Years	3	SS	<u>Admin Test</u>				

### 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



The screenshot shows a section of the EdPlan interface. At the top, there are two green buttons: "View Students" and "Advanced Student Search". Below these is a horizontal line. Under the line, there is a dropdown menu with the text "--no assigned school--" and a downward arrow. To the right of the dropdown menu is a green button labeled "<-- Add new student to". A red arrow points from the top left towards the dropdown menu.

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.

## OK EdPlan™ - Administrator's Manual

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:
Grade:				Language of Instruction:
School:				Hispanic or Latino Ethnicity:
Length of School Week:				Race:

*(leave empty if attends a standard School day)*

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:	
	<input checked="" type="checkbox"/> Student Lives Here
E-Mail:	
Home Phone:	
<b>(Note: For consistency, if both parents work, enter the father's work phone number first, and the mother's second)</b>	
Work Phone:	
	<input checked="" type="checkbox"/> Include on IEP Team <input type="checkbox"/> 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.

## OK EdPlan™ - Administrator's Manual

Make this student inactive

- The following screen will appear:

**Exit Questionnaire**

**Taylor Test**  
[New Mail!](#)

<b>Date Exited:</b>	05/30/2015
<b>Reason for Exiting:</b>	<input type="text"/>
<b>Anticipated Services Required:</b>	(No items available)

Back
Save and Continue

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

### Reactivate a Student

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

**Criteria for Selecting Inactive Students to View**

[New Mail!](#)

<b>Last School Attended:</b>	<input type="text" value="All Schools"/>
<b>Student Last Name:</b>	<input type="text"/> <input type="checkbox"/> Exact Match
<b>Student First Name:</b>	<input type="text"/> <input type="checkbox"/> Exact Match
<b>Student Middle Name:</b>	<input type="text"/> <input type="checkbox"/> Exact Match
<b>STN Number:</b>	<input type="text"/> <input type="checkbox"/> Exact Match
<b>Local ID:</b>	<input type="text"/> <input type="checkbox"/> Exact Match
<b>Students Exited After:</b>	<input type="text"/>
<b>Students Exited Before:</b>	<input type="text"/>
<b>Exit Reason:</b>	<input type="text" value="-Any-"/>
<b>Sort List By:</b>	<input type="text" value="Student's Last Name"/>

View Inactive Students

## OK EdPlan™ - Administrator's Manual

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

**Exiting Student Information** **Daniel Test**  
[New Mail!](#)

Date Exited: 11/04/2014

Reason for Exiting: Moved, Known to be Continuing

[Update the Database](#)

Re-Activation Date: 05/30/2015

[Re-Activate this Student in the Database](#)

[Permanently Delete this Student](#)

### 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.













CP	Last Elig	Eligibility Due Date	Last IEP	IEP Due Date	School	Grade	Name	Student ID	Date of Birth	Age	Hist Dis
✓ ✓ ✓	07/28/2015	07/28/2018	06/21/2016	06/21/2017	SS	05	<a href="#">Alice Wonderland Jiminey Cricket the Great Test</a>	0000000127	06/10/2006	10 Years	AUT
✓ ✓	11/03/2015	11/03/2018	10/29/2015	03/01/2017	SS	08	<a href="#">Angela Test</a>	123	07/16/2013	3 Years	SLD
Ⓢ ✓	07/07/2015	04/06/2016			SS	04	<a href="#">Avery Test</a>	774455	04/06/2006	10 Years	DD,ED
✓ 5					SS	06	<a href="#">Babe Ruth Test</a>	BRTEST	02/03/2000	16 Years	
✓ ✓ ✓	02/05/2016	08/15/2018	01/14/2016	01/14/2017	SS	12	<a href="#">Berklie K Test</a>	445566	08/15/2008	7 Years	DD,VI,SLD
⚠ Ⓢ	07/20/2016	07/20/2019			FF	07	<a href="#">Boyd Crowder Test</a>	WTF097	06/16/2003	13 Years	ED,ID
✓ ✓ ✓	09/01/2014	09/01/2017	10/05/2015	10/05/2016	SS	KG	<a href="#">Brad Pitt Test</a>	001122	06/08/2010	6 Years	SLD

Definitions of compliance symbols are on the next page.



## OK EdPlan™ - Administrator's Manual

### 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.

## OK EdPlan™ - Administrator's Manual

### 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
<input type="checkbox"/>	1643	06/08/2016	<a href="#">Written Notice to Parents</a>	PDF	<input type="checkbox"/>	(Draft)		
<input type="checkbox"/>	1474	02/10/2016	<a href="#">Special Education Parent Consent</a>	PDF	<input type="checkbox"/>	<input type="checkbox"/>		
E	1407	01/05/2016	<a href="#">OK Eligibility - MEEGS</a>	PDF	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	1374	12/18/2015	<a href="#">Special Education Parent Consent</a>	PDF	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	1373	12/18/2015	<a href="#">Special Education Parent Consent</a>	PDF	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	1334	12/15/2015	<a href="#">Written Notice to Parents</a>	PDF	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	1332	12/15/2015	<a href="#">OK - Meeting Invitation</a>	PDF	<input type="checkbox"/>	<input type="checkbox"/>		
E	1306	12/01/2015	<a href="#">OK Eligibility - RED</a>	PDF	<input type="checkbox"/>	<input type="checkbox"/>		
E	1169	11/03/2015	<a href="#">OK Eligibility - RED</a>	PDF	<input type="checkbox"/>	<input type="checkbox"/>		

#### 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.

## OK EdPlan™ - Administrator's Manual

Student History						Carrie Underwood Test (✓)			
Status	Child Study Date	Referral Date	Consent Date	Proj Consent Date	Elig Date	Proj Elig Date	IEP Date	Proj IEP Date	
SpecialEd					07/28/2015	07/28/2018	03/15/2016	02/22/2017	
504 Status	504 Referral Date	504 Eligibility Date	Proj 504 Eligibility Date	Cur 504 Date	Proj 504 Date				
Del	Event ID	Event Date*	Event Type	Begin Date	End Date	User	Document	Date Created	
<input type="checkbox"/>	74	07/28/2015	Eligibility Determination	07/28/2015	07/28/2018	Cory Wall	OK Eligibility - MEEGS (ID# 395)	07/28/2015 15:45 (352 days)	Details
<input type="checkbox"/>	309	11/13/2015	Enter Early Childhood Placement			Samantha Law		11/13/2015 15:27 (244 days)	Details
<input type="checkbox"/>	377	02/22/2016	IEP	02/22/2016	02/22/2017	Samantha Test	OK IEP (ID# 1494)	02/22/2016 15:19 (143 days)	Details
<input type="checkbox"/>	400	03/15/2016	IEP	03/15/2016	02/22/2017	Cory Wall	IEP Addendum (ID# 1543)	03/15/2016 08:27 (121 days)	Details

### 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.

<input type="checkbox"/>	400	03/15/2016	IEP	03/15/2016	02/22/2017	Cory Wall	IEP Addendum (ID# 1543)	03/15/2016 08:27 (121 days)	Details
--------------------------	-----	------------	-----	------------	------------	-----------	-------------------------	-----------------------------	---------

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.

## OK EdPlan™ - Administrator's Manual

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

	24	07/08/2015	IEP	07/08/2015	07/08/2016	Katie Franke	IEP Addendum (ID# 179)	07/08/2015 13:57 (372 days)	Details
<input type="checkbox"/>	212	09/18/2015	Progress Report (2015 - Report Card 1)			Alicia M Test	Progress Report (ID# 1039)	09/18/2015 12:12 (300 days)	Details

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

	24	07/08/2015	IEP	07/08/2015	07/08/2016	Katie Franke	IEP Addendum (ID# 179)	07/08/2015 13:57 (372 days)	Details
<input type="checkbox"/>	212	09/18/2015	Progress Report (2015 - Report Card 1)			Alicia M Test	Progress Report (ID# 1039)	09/18/2015 12:12 (300 days)	Details

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.

## OK EdPlan™ - Administrator's Manual

**Jennifer Robison**  
[New Mail](#)

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	<input type="checkbox"/>	<a href="#">OK Eligibility - MEEGS</a>	PDF	<input type="checkbox"/>		
E	06/20/2016	Jennifer Robison	Thatcher Test	<input type="checkbox"/>	<a href="#">OK Eligibility - RED</a>	PDF	<input type="checkbox"/>		
E	02/17/2016	Jennifer Robison	David Beckham Test	<input type="checkbox"/>	<a href="#">504-Eligibility Report (Eligible)</a>	PDF	<input type="checkbox"/>		
E	02/17/2016	Jennifer Robison	Dolly Parton Test	<input type="checkbox"/>	<a href="#">OK IEP</a>	PDF	<input type="checkbox"/>	<a href="#">Testing Document</a>	02/18/2016
E	09/14/2015	Jennifer Robison	Sugar Ray Test	<input type="checkbox"/>	<a href="#">OK Eligibility - MEEGS</a>	PDF	<input type="checkbox"/>		
<input type="checkbox"/>	09/14/2015	Jennifer Robison	Brad Pitt Test	<input type="checkbox"/>	<a href="#">OK Eligibility - RED</a>	PDF	<input type="checkbox"/>		

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 be 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.

## OK EdPlan™ - Administrator's Manual

**Jennifer Robison**  
[New Mail!](#)

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	<input checked="" type="checkbox"/>	<a href="#">OK Eligibility - MEEGS</a>	PDF	<input type="checkbox"/>		
E	06/20/2016	Jennifer Robison	Thatcher Test	<input type="checkbox"/>	<a href="#">OK Eligibility - RED</a>	PDF	<input type="checkbox"/>		
E	02/17/2016	Jennifer Robison	David Beckham Test	<input type="checkbox"/>	<a href="#">504-Eligibility Report (Eligible)</a>	PDF	<input type="checkbox"/>		
E	02/17/2016	Jennifer Robison	Dolly Parton Test	<input type="checkbox"/>	<a href="#">OK IEP</a>	PDF	<input type="checkbox"/>	<a href="#">Testing Document</a>	02/18/2016
E	09/14/2015	Jennifer Robison	Sugar Ray Test	<input checked="" type="checkbox"/>	<a href="#">OK Eligibility - MEEGS</a>	PDF	<input type="checkbox"/>		
<input type="checkbox"/>	09/14/2015	Jennifer Robison	Brad Pitt Test	<input type="checkbox"/>	<a href="#">OK Eligibility - RED</a>	PDF	<input type="checkbox"/>		

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 be deleted when the associated document is deleted.

(6 Documents)

[Update the Database](#)

### WIZARD TAB

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

### Caseload Administration Wizard

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



The navigation bar shows the 'Wizards' tab highlighted in red. Other tabs include Main Menu, Students, My Docs, My Reports, Schools, School System, Users, Super User, District Summary Data, and PCG. A search bar and user information (Welcome, Jennifer | My Calendar | Message Board | Logout) are also visible.

- Click the 'Caseload Administration Wizard' link.

**Available Wizards** [New Mail!](#)

[Progress Report Wizard](#)  
[IEP At-a-Glance Wizard](#)  
[Caseload Setup Wizard](#)  
[Caseload Administration Wizard](#)

## OK EdPlan™ - Administrator's Manual

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.

**(Select User)**  
[New Mail!](#)

<b>School:</b>	All Schools ▼		
<b>User Type(s):</b> (check none to match all)	<input type="checkbox"/> State OK EdPlan Administrator	<input type="checkbox"/> Outside Provider/Contracted Providers	
	<input type="checkbox"/> State OKEdplan Read Only	<input type="checkbox"/> IEP Team Member No Login	
	<input type="checkbox"/> EdPlan/EasyIEP Administrator (Admin Edit)	<input type="checkbox"/> School Staff (Teacher Read)	
	<input type="checkbox"/> Certifying Specialist (Building Admin)	<input type="checkbox"/> 504 District Admin	
	<input type="checkbox"/> District-wide Consultant	<input type="checkbox"/> General Education Teacher	
	<input type="checkbox"/> School/District Lead (Admin Support Edit)	<input type="checkbox"/> External School System Team Member	
	<input type="checkbox"/> School Administrator (Build Admin Read)	<input type="checkbox"/> 504 School Admin	
	<input type="checkbox"/> Special Educator (Teacher Edit)	<input type="checkbox"/> 504 Service Provider	
	<input type="checkbox"/> School Psychologist	<input type="checkbox"/> IT User	
	<input type="checkbox"/> School Counselor	<input type="checkbox"/> Record Specialist	
	<input type="checkbox"/> Related Service Provider	<input type="checkbox"/> No Login	
	<b>User Last Name:</b>	<input type="text"/>	<input type="checkbox"/> Exact Match
	<b>User First Name:</b>	<input type="text"/>	<input type="checkbox"/> Exact Match
<b>Title:</b>	<input type="text"/>	<input type="checkbox"/> Exact Match	
<b>User ID:</b>	<input type="text"/>	<input type="checkbox"/> Exact Match	
<b>Sort List By:</b>	User's Last Name ▼		

View User(s)  
View Previous Search Results  
Add New User

4. The current caseload page appears.
5. Use the 'Check All' and 'Check None' buttons as needed.

## OK EdPlan™ - Administrator's Manual

Caseload Administration Wizard - Current Special Education Caseload Samantha Test [New Mail](#)

Teacher of Record		Team Member		Student	School	Grade	Date Of Birth	Current Teacher of Record
<input type="checkbox"/> Check All	<input type="checkbox"/> Check None	<input type="checkbox"/> Check All	<input type="checkbox"/> Check None					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Erik Friend	FF	11	05/21/1998	Samantha Test
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Berklie K Test	SS	12	08/15/2008	Samantha Test
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Carrie Underwood Test	SS	05	05/05/2011	Samantha Test
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dolly Parton Test	SS	11	07/01/1999	Samantha Test
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Eligibility RED Test	SS	05	09/13/2005	Samantha Test
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Garth Brooks Test	SS	05	07/01/2005	Samantha Test
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Madison Test	SS	02	11/13/2007	Samantha Test
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Magic Johnson Test	SS	02	07/01/2009	Shawna S Keene
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reba McIntyre Test	SS	PK	09/24/2012	Samantha Test
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Samantha D Test	SS	04	05/20/2000	Samantha Test
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Thatcher Test	SS	02	11/13/2007	Samantha Test

(11 Students)

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.



## OK EdPlan™ - Administrator's Manual

**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?

### Transfer/Copy Caseload

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

- 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  Samantha Test's Special Education Caseload to the following user:

- 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  Samantha Test's Special Education Caseload to the following user:

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.

- Click the 'Review Students and Continue' button.

## OK EdPlan™ - Administrator's Manual

### 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.

**Add new school**

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.

**Add New School** [New Mail](#)

<b>School Name:</b>	<input style="width: 80%;" type="text"/>
<b>Abbreviation:</b>	<input style="width: 80%;" type="text"/>
	<input type="checkbox"/> External School
<b>External School System:</b>	<input style="width: 80%;" type="text"/> ▼ (if an External School)
<b>School Code:</b>	<input style="width: 80%;" type="text"/>
<b>Type of School:</b>	<input style="width: 80%;" type="text" value="Elementary"/> ▼
<b>Units Per Day:</b>	<input style="width: 80%;" type="text"/>
<b>Preferred Time Units:</b>	<input style="width: 80%;" type="text" value="hour(s)"/> ▼
<b>Address:</b>	<input style="width: 80%;" type="text"/>
<b>City, State, Zip Code:</b>	<input style="width: 30%;" type="text"/> <input style="width: 10%;" type="text"/> <input style="width: 60%;" type="text"/>
<b>Phone, Fax:</b>	<input style="width: 40%;" type="text"/> <input style="width: 40%;" type="text"/>
<b>E-Mail:</b>	<input style="width: 80%;" type="text"/>

**Add School to Database**

**Add School to Database, then add another**








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.

## OK EdPlan™ - Administrator's Manual

**Schools** [New Mail!](#)

CP	School Name	Abbrev	Code	Address	City, State Zip	Phone	Fax	Email
 	<a href="#">Sample School</a>	SS	007	Weesh Street	Nashville, TN 37027	807-459-1234	FAX-515-2524	
 	<a href="#">Sample School 2</a>	SS2	SampleCode2	1255 n North	Okc, OK 74887	582-987-8852		
	<a href="#">Sample School 4</a>	SS4	SS4	55 School St	Ardmore, OK 11111	555-555-5555		
	<a href="#">Sample2 School</a>	SS2	SS2	10 Main Street	Test, OK 11111	999-555-5555		
	<a href="#">Test School</a>	Test	1234					

(5 Schools)

[Add new School](#)











- Click on the compliance symbol next to a specific user. This will show you student-specific compliance.

**Select a User**

Del	CP	Name	School(s)	Students	Title	User Type	E-mail Address
<input type="checkbox"/>	<input type="radio"/>	<a href="#">Test Administrator</a>	-All-	0, 12	Program Specialist	School System Administrator	<a href="mailto:testadministrator@ashville.k12.nc.us">testadministrator@ashville.k12.nc.us</a>

- 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.

**Select a Student (Caseload of Samantha Test)** [New Mail!](#)

CP	Last Elig	Eligibility Due Date	Last IEP	IEP Due Date	School	Grade	Name	Student ID	Date of Birth	Age	Hist Dis	IEP Case Manager	504 Elig	504 Plan	504 Committee Chair	STN
	02/05/2016	08/15/2018	01/14/2016	01/14/2017	SS	12	<a href="#">Berlie K Test</a>	445566	08/15/2008	7 Years	DD,VI,SLD	<a href="#">Samantha Test</a>				
	07/28/2015	07/28/2018	03/15/2016	02/22/2017	SS	05	<a href="#">Carrie Underwood Test</a>	CUTEST	05/05/2011	5 Years	SLI	<a href="#">Samantha Test</a>				22334444
	09/17/2015	09/17/2018	10/28/2015	10/28/2016	SS	11	<a href="#">Dolby Parton Test</a>	DPTEST	07/01/1999	16 Years	AUT	<a href="#">Samantha Test</a>	09/17/2015	09/18/2015	Bob Test	33445555
	08/13/2014	09/13/2015			SS	05	<a href="#">Eligibility RED Test</a>	ERT123	09/13/2005	10 Years	DD,HI	<a href="#">Samantha Test</a>				ERT123
	07/27/2015	07/27/2018			SS	05	<a href="#">Garth Brooks Test</a>	GBTEST01	07/01/2005	10 Years	SLI,ID	<a href="#">Samantha Test</a>				111222333
			06/19/2016	06/19/2017	SS	02	<a href="#">Madison Test</a>	998877	11/13/2007	8 Years		<a href="#">Samantha Test</a>				9988776655
					SS	PK	<a href="#">Reba McIntyre Test</a>	RMCTEST	09/24/2012	3 Years		<a href="#">Samantha Test</a>				9876543
					SS	04	<a href="#">Samantha D Test</a>	1234567	05/20/2000	16 Years		<a href="#">Samantha Test</a>				TENNESSEE
	06/19/2016	06/19/2019			SS	02	<a href="#">Thatcher Test</a>	002233	11/13/2007	8 Years	SLI	<a href="#">Samantha Test</a>				0022334455
	10/25/2015	10/25/2018	03/21/2016	03/21/2017	SS	02	<a href="#">Magic Johnson Test</a>	MAGJTEST	07/01/2009	6 Years	HI	<a href="#">Shawna S Keene</a>				

(10 Students)

[Print Caseload](#) [Export Caseload](#)

--No Assigned School-- [Add new Student to](#)


### To Edit School Information or Delete a School

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

## OK EdPlan™ - Administrator's Manual

### Edit School Information

**Sample School**

 [New Mail!](#)

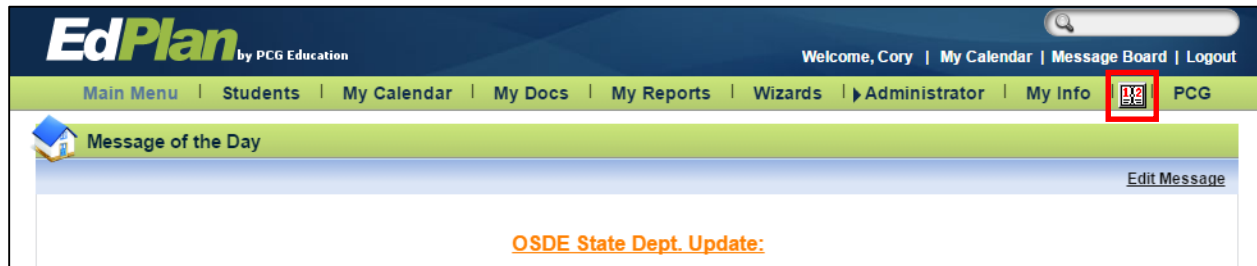
<b>School Name:</b>	<input type="text" value="Sample School"/>
<b>Abbreviation:</b>	<input type="text" value="SS"/>
	<input type="checkbox"/> External School
<b>External School System:</b>	<input type="text" value=""/> (if an External School)
<b>School Code:</b>	<input type="text" value="SS"/>
<b>Type of School:</b>	<input type="text" value="Elementary"/>
<b>Length of School Day:</b>	<input type="text" value="7.00"/> hours (Prev) <input type="text" value="Inactive"/>
<b>Address:</b>	<input type="text" value="Sample School Lane"/>
<b>City, State, ZipCode:</b>	<input type="text" value="Sample"/> <input type="text" value="OK"/> <input type="text" value=""/>
<b>Phone Number:</b>	<input type="text" value=""/>
<b>Fax Number:</b>	<input type="text" value=""/>
<b>Caller ID:</b>	<input type="text" value=""/>
<b>E-Mail Address:</b>	<input type="text" value=""/>

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.

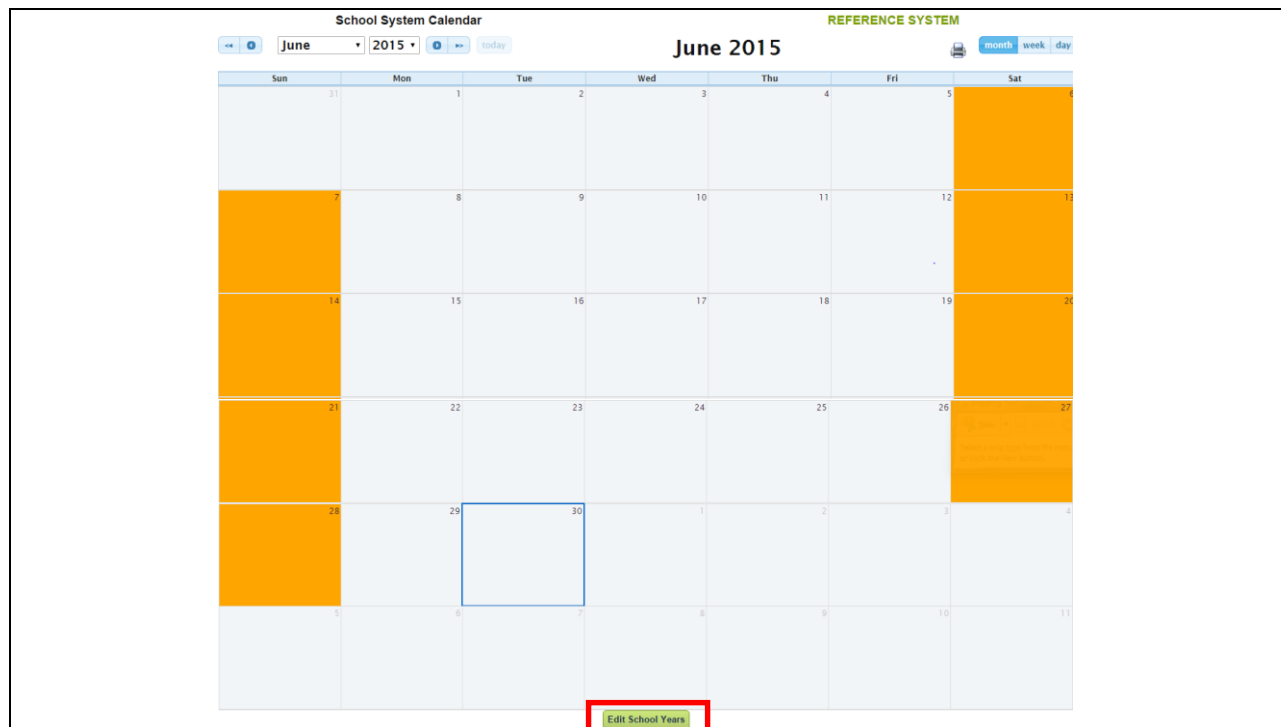
## OK EdPlan™ - Administrator's Manual

### 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.

## OK EdPlan™ - Administrator's Manual

**Edit School Years** (Oklahoma Reference Site) [New Mail!](#)

Del	School Year	Begin Date	End Date	Cal Days	Sch Days	ESY Schedule	Report Periods
	2014-2015	07/01/2014	06/30/2015	365	260	<a href="#">Edit</a>	<a href="#">Edit</a>
	2015-2016	08/03/2015	06/03/2016	306	219	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2016-2017	08/08/2016	06/09/2017	306	220	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2017-2018	08/14/2017	06/08/2018			<a href="#">Edit</a>	<a href="#">Edit</a>

NOTE: You cannot delete a school year if a Report Card has been created for that school year or if that year is the currently selected School Year for the School System. Please do not create "holes" in the School Years. If you do, then next time you add a new school year, the holes will be filled in before higher school years are added.

[Update the database](#)

[Add previous school year](#)   [Add next 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 '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 school years page.

**Edit School Years** (Oklahoma Reference Site) [New Mail!](#)

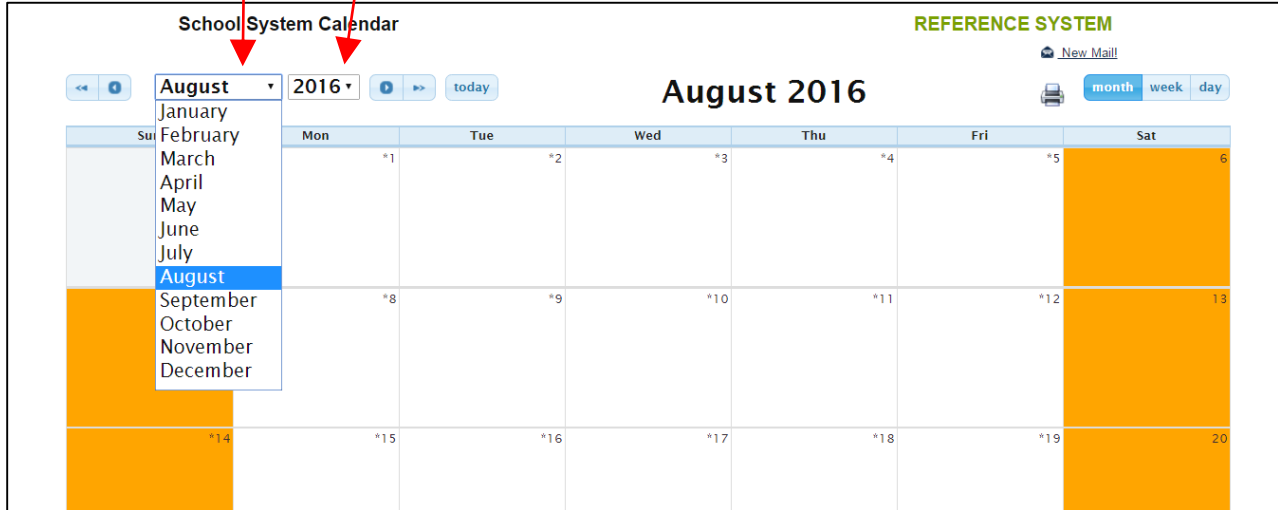
Del	School Year	Begin Date	End Date	Cal Days	Sch Days	ESY Schedule	Report Periods
	2014-2015	07/01/2014	06/30/2015	365	260	<a href="#">Edit</a>	<a href="#">Edit</a>
	2015-2016	08/03/2015	06/03/2016	306	219	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2016-2017	08/08/2016	06/09/2017	306	220	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2017-2018	08/14/2017	06/08/2018	299	214	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2018-2019	<input type="text"/>	<input type="text"/>			<a href="#">Edit</a>	<a href="#">Edit</a>

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

## OK EdPlan™ - Administrator's Manual

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.



The screenshot shows the 'School System Calendar' interface. At the top, it says 'School System Calendar' and 'REFERENCE SYSTEM'. Below this, there are navigation controls: a left arrow, a dropdown menu currently set to 'August', a year dropdown set to '2016', a right arrow, and a 'today' button. To the right, there are links for '.New Mail', a printer icon, and view options for 'month', 'week', and 'day'. The main calendar grid shows August 2016 with days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and dates. Some dates (1, 2, 3, 4, 5, 6, 13, 14, 19, 20) are highlighted in orange, indicating non-school days. A dropdown menu is open over the month selection, listing months from January to December, with 'August' selected.

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.

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Level	Day Type	Label
School System	Holiday	Fall Break

NOTE: To change the **Day Type** and **Label** for multiple days at once, please enter a date range in the format mm/dd/yyyy - mm/dd/yyyy. You can also enter multiple date ranges separated by a comma. If you use this feature, the day that you selected in the calendar (9/7/2015) will only be included if occurs in one of the date ranges you enter. Also note that if you add any calendar entries below (where it says "New Calendar Entries:"), they will only be added to the date 9/7/2015, not to dates in the date ranges you enter here.

10/12/15-10/16/15

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.

Level	Day Type	Label
School System	Summer	

NOTE: To change the **Day Type** and **Label** for multiple days at once, please enter a date range in the format mm/dd/yyyy - mm/dd/yyyy. You can also enter multiple date ranges separated by a comma. If you use this feature, the day that you selected in the calendar (9/7/2015) will only be included if occurs in one of the date ranges you enter. Also note that if you add any calendar entries below (where it says "New Calendar Entries:"), they will only be added to the date 9/7/2015, not to dates in the date ranges you enter here.

07/01/15-08/02/15



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All Summer days show as blue on the calendar.

School System Calendar REFERENCE SYSTEM

<< >> June 2016 today New Mail month week day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	*1	*2	*3	4
*5	*6	*7	*8	*9	*10	11
*12	*13	*14	*15	*16	*17	18

### 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.

## OK EdPlan™ - Administrator's Manual

**Edit School Years** (REFERENCE SYSTEM) [New Mail](#)

Del	School Year	Begin Date	End Date	Cal Days	Sch Days	ESY Schedule	Report Periods
<input type="checkbox"/>	2005-2006	09/05/2005	05/01/2006	239	171	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2006-2007	09/05/2006	05/01/2007	239	170	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2007-2008	09/05/2007	05/01/2008	240	171	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2008-2009	09/05/2008	05/01/2009	239	170	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2009-2010	09/05/2009	05/01/2010	239	169	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2010-2011	09/05/2010	05/01/2011	239	170	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2011-2012	09/05/2011	05/01/2012	240	172	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2012-2013	09/05/2012	05/01/2013	239	170	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2013-2014	09/05/2013	06/30/2014	299	212	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2014-2015	09/05/2014	06/30/2015	299	212	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2015-2016	08/06/2015	05/12/2016	281	194	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2016-2017	07/01/2016	06/30/2017	365	261	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2017-2018	07/01/2017	06/30/2018	365	259	<a href="#">Edit</a>	<a href="#">Edit</a>
<input type="checkbox"/>	2018-2019	07/01/2018	06/30/2019	365	259	<a href="#">Edit</a>	<a href="#">Edit</a>

- Click the 'Add Another Reporting Period' button until the list contains the correct number of report card periods for the District.

**Edit 2016-2017 Reporting Period Schedule** (REFERENCE SYSTEM) [New Mail](#)

Del	Reporting Period	Reporting Period Name	Begin Date	End Date	ESY	Cal Days	Sch Days
<input type="checkbox"/>	1	1st 9 wks 8/15/16-10/15/16	08/15/2016	10/15/2016	<input type="checkbox"/>	62	45
<input type="checkbox"/>	2	2nd 9 wks 10/16/16-12/15/16	10/16/2016	12/15/2016	<input type="checkbox"/>	61	44
<input type="checkbox"/>	3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		

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

[Update the Database](#)  
[Auto-fill Begin and End Dates](#)  
[Add another reporting period](#)

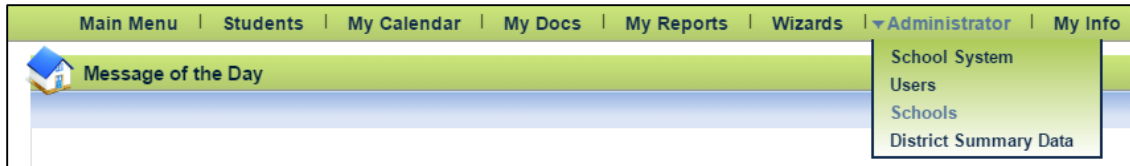
- Scroll down and click the 'Auto-fill Begin and End Dates' button or define periods by entering specific 'Begin and End Dates'. Clicking the Update the Database button saves the report periods and updates the 'Cal Days' and 'Sch Days' fields.

### Custom Calendars

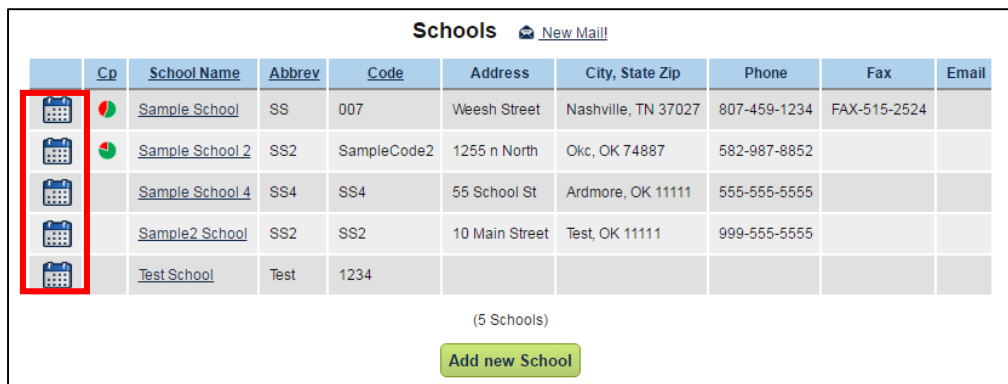
If your district has any schools with a different school day calendar than the rest of the district, create a custom calendar for that school.

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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.



The screenshot shows a table titled 'Schools' with a 'New Mail!' icon. The table has columns: Cp, School Name, Abbrev, Code, Address, City, State Zip, Phone, Fax, and Email. A red box highlights the calendar icons in the 'Cp' column for the first five rows. Below the table, it says '(5 Schools)' and there is an 'Add new School' button.

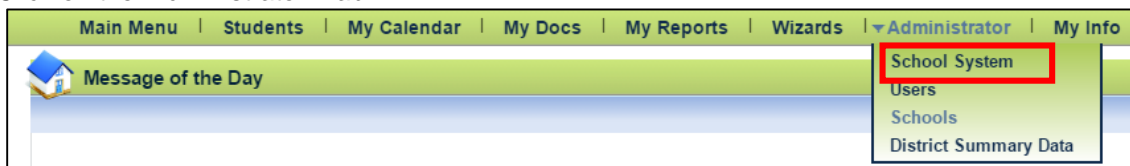
Cp	School Name	Abbrev	Code	Address	City, State Zip	Phone	Fax	Email
	<a href="#">Sample School</a>	SS	007	Weesh Street	Nashville, TN 37027	807-459-1234	FAX-515-2524	
	<a href="#">Sample School 2</a>	SS2	SampleCode2	1255 n North	Okc, OK 74887	582-987-8852		
	<a href="#">Sample School 4</a>	SS4	SS4	55 School St	Ardmore, OK 11111	555-555-5555		
	<a href="#">Sample2 School</a>	SS2	SS2	10 Main Street	Test, OK 11111	999-555-5555		
	<a href="#">Test School</a>	Test	1234					

## ADMINISTRATOR TAB

### School System

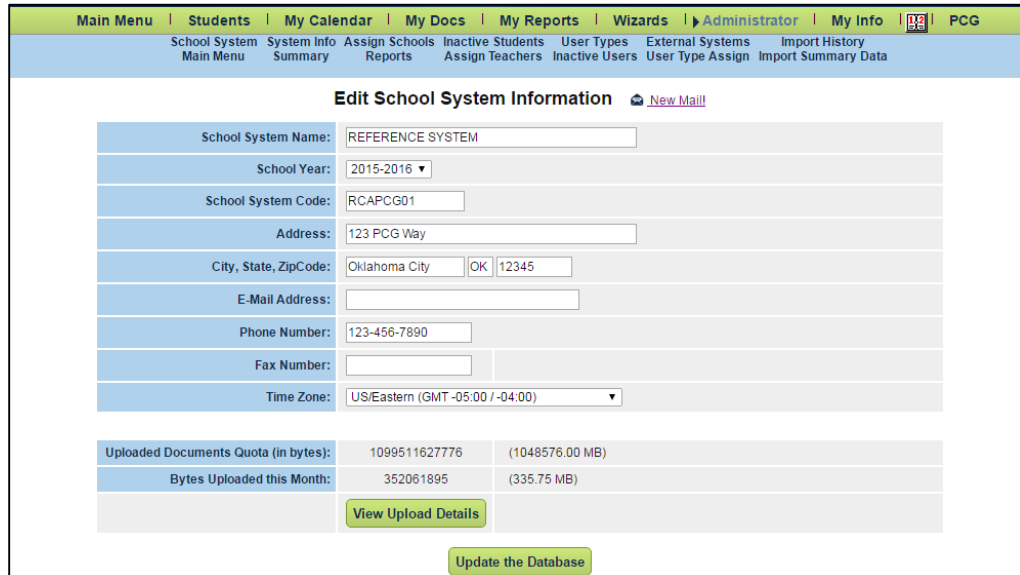
The School System information is entered by an EdPlan™ Administrator.

1. Click on the 'Administrator' Tab.



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

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**Edit School System Information** [New Mail!](#)

School System Name:	REFERENCE SYSTEM	
School Year:	2015-2016	
School System Code:	RCAPCG01	
Address:	123 PCG Way	
City, State, ZipCode:	Oklahoma City	OK 12345
E-Mail Address:		
Phone Number:	123-456-7890	
Fax Number:		
Time Zone:	US/Eastern (GMT -05:00 / -04:00)	

Uploaded Documents Quota (in bytes):	1099511627776	(1048576.00 MB)
Bytes Uploaded this Month:	352061895	(335.75 MB)

[View Upload Details](#)

[Update the Database](#)

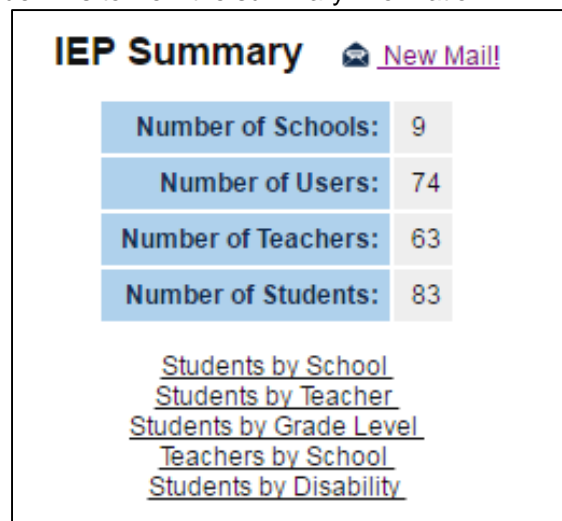
### Summary

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.



**IEP Summary** [New Mail!](#)

Number of Schools:	9
Number of Users:	74
Number of Teachers:	63
Number of Students:	83

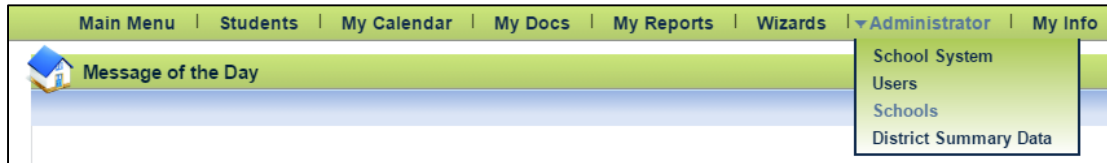
[Students by School](#)  
[Students by Teacher](#)  
[Students by Grade Level](#)  
[Teachers by School](#)  
[Students by Disability](#)

## OK EdPlan™ - Administrator's Manual

### REPORTS

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

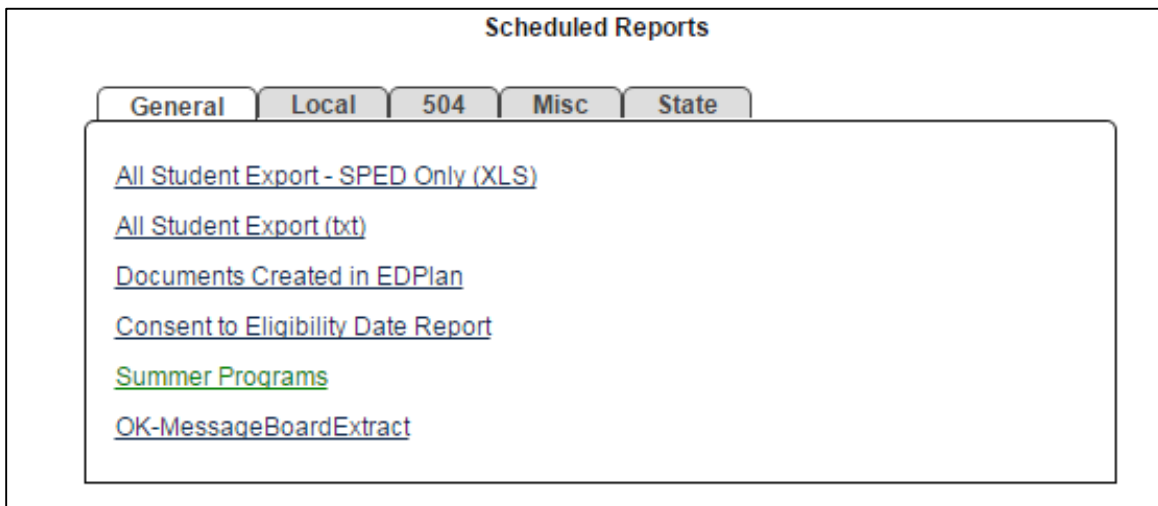
1. Click on the 'School System' tab under the 'Administrator' tab.



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).

## OK EdPlan™ - Administrator's Manual

- 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	<a href="#">Projected IEP Meetings (PDF)</a>	08/20/2016		
07/21/2016 11:51:00	Samantha Test	<a href="#">Projected Eligibility Meetings (PDF)</a>	08/20/2016		
07/21/2016 11:50:00	Samantha Test	<a href="#">Projected Eligibility Meetings (txt)</a>	08/20/2016		
07/21/2016 11:36:00	Erik Friend	<a href="#">LRE, ECE, Disproportionality Report (TXT)</a>	08/20/2016		
07/21/2016 11:34:00	Erik Friend	<a href="#">LRE, ECE, Disproportionality Report (TXT)</a>	08/20/2016		
07/19/2016 12:38:00	Christian Kissinger	<a href="#">Duplicate Student Report (txt)</a>	08/18/2016		
07/19/2016 12:31:00	Christian Kissinger	<a href="#">Summer Programs</a>	08/18/2016	<input type="checkbox"/>	<input type="text"/>
07/19/2016 12:22:00	Christian Kissinger	<a href="#">All Student Export - SPED Only (XLS)</a>	08/18/2016		
07/14/2016 17:40:00	Alicia Smith	<a href="#">Table 5 Discipline DETAILS Report</a>	08/13/2016		
07/14/2016 17:39:00	Alicia Smith	<a href="#">Table 5 Discipline DETAILS Report-PILOT</a>	08/13/2016		
07/11/2016 13:34:00	Angela Kwok	<a href="#">Consent to Eligibility Date Report</a>	08/10/2016	<input type="checkbox"/>	<input type="text"/>
07/11/2016 13:29:00	Angela Kwok	<a href="#">Table 5 Discipline DETAILS Report-PILOT</a>	08/10/2016		
07/05/2016 11:13:00	Shawna S Keene	<a href="#">Projected IEP Meetings (txt)</a>	08/04/2016		
07/02/2016 00:52:00	Cameron Scott Lackey	<a href="#">Documents Created in EDPlan</a>	08/01/2016		
07/01/2016 23:08:00	Cameron Scott Lackey	<a href="#">Recent Logins (TXT)</a>	07/31/2016		

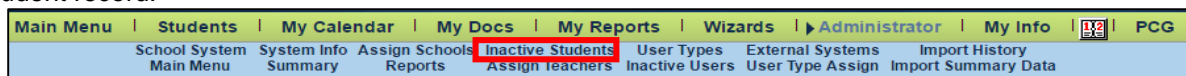
### Notes:

- 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™.

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



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

## OK EdPlan™ - Administrator's Manual

**Criteria for Selecting Inactive Students to View** [New Mail!](#)

Last School Attended:	All Schools	
Student Last Name:	<input type="text"/>	<input type="checkbox"/> Exact Match
Student First Name:	<input type="text"/>	<input type="checkbox"/> Exact Match
Student Middle Name:	<input type="text"/>	<input type="checkbox"/> Exact Match
Date of Birth:	<input type="text"/>	
Student ID:	<input type="text"/>	<input type="checkbox"/> Exact Match
State Testing Number (STN):	<input type="text"/>	<input type="checkbox"/> Exact Match
Students Exited After:	<input type="text"/>	
Students Exited Before:	<input type="text"/>	
Exit Reason:	--Any--	
Sort List By:	Student's Last Name	

View Inactive Students

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

**Manage Inactive Students** [New Mail!](#)

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

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

[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**

Date Exited:

Reason for Exiting:

Update the Database

---

Re-Activation Date:

Re-Activate this Student in the Database

**Kennedy Test**

[New Mail!](#)

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

## OK EdPlan™ - Administrator's Manual

### 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'.

**Criteria for Selecting Inactive Students to View** [New Mail!](#)

Last School Attended:	All Schools	
Student Last Name:	<input type="text"/>	<input type="checkbox"/> Exact Match
Student First Name:	<input type="text"/>	<input type="checkbox"/> Exact Match
Student Middle Name:	<input type="text"/>	<input type="checkbox"/> Exact Match
Date of Birth:	<input type="text"/>	<input type="checkbox"/> Exact Match
Student ID:	<input type="text"/>	<input type="checkbox"/> Exact Match
State Testing Number (STN):	<input type="text"/>	<input type="checkbox"/> Exact Match
Students Exited After:	<input type="text"/>	<input type="checkbox"/> Exact Match
Students Exited Before:	<input type="text"/>	<input type="checkbox"/> Exact Match
Exit Reason:	--Any--	
Sort List By:	Student's Last Name	

[View Inactive Students](#)

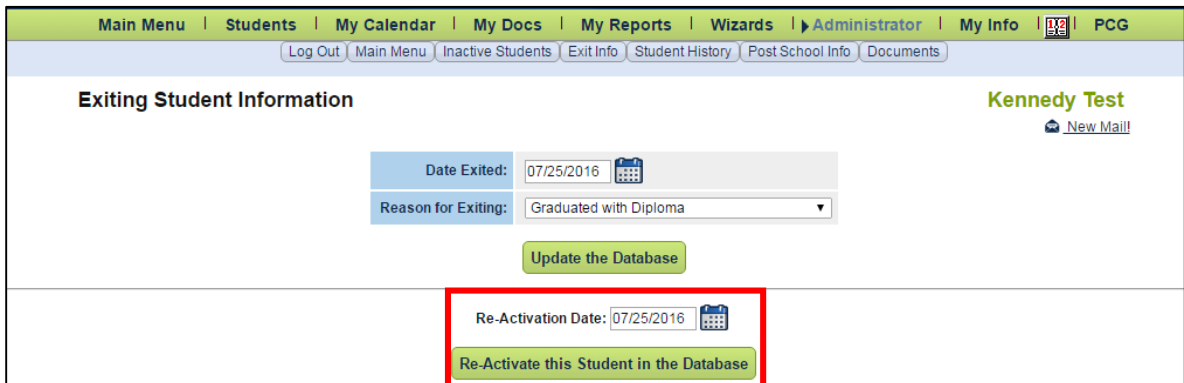
3. Click on the student's name.



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

- 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

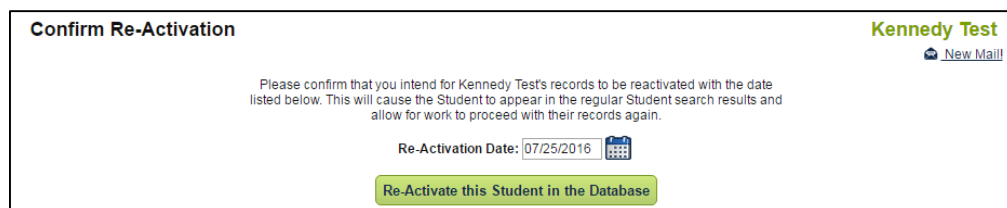
Reason for Exiting: Graduated with Diploma

[Update the Database](#)

Re-Activation Date: 07/25/2016

[Re-Activate this Student in the Database](#)

- 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:

- From the 'Main Menu,' click on the 'School System' tab under 'Administrator' and click on user types.

## OK EdPlan™ - Administrator's Manual



- Click on the user type to review the permissions.

**View User Type to View** (Management disabled between 9 AM and 5 PM) [New Mail!](#)

ID	User Type	Code	# Users	Assoc with All Schools	Assoc with All Grades	Can Be Teacher of Record	Can Be IEP Team Member	Can Be Committee Chairperson	Can Be Section 504 Team Member	Can Be Aggregate User	Can Be System Contact
27	State OK EdPlan Administrator		2	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
28	State OK EdPlan Read Only		2	Yes	Yes	No	No	No	No	Yes	Yes
12	EdPlan Easy IEP Administrator (Admin Edit)		10	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
14	Centrino Specialist (Building Admin)		4	No	Yes	Yes	Yes	Yes	Yes	No	No
16	District-wide Consultant		1	Yes	Yes	No	Yes	Yes	Yes	No	No
17	School District Lead (Admin Support Edit)		2	No	Yes	Yes	Yes	Yes	Yes	No	No
19	School Administrator (Build Admin Read)		1	No	Yes	No	Yes	No	Yes	No	Yes
11	Special Educator (Teacher Edit)		12	No	Yes	Yes	Yes	No	No	No	No
13	School Psychologist		1	Yes	Yes	Yes	Yes	Yes	Yes	No	No
29	School Counselor		1	No	Yes	Yes	Yes	Yes	Yes	No	No
15	Related Service Provider		2	Yes	Yes	No	Yes	No	No	No	No
20	Outside Provider/Contracted Providers		1	No	Yes	Yes	Yes	No	No	No	No
22	IEP Team Member No Login		0	No	No	No	Yes	No	No	No	No
18	School Staff (Teacher Read)		1	No	Yes	No	Yes	No	No	No	No
24	504 District Admin	62	0	Yes	Yes	No	No	Yes	Yes	No	No
32	General Education Teacher		1	No	Yes	No	Yes	No	Yes	No	No
33	External School System Team Member		1	No	Yes	No	Yes	No	No	No	No
25	504 School Admin	63	2	No	Yes	No	No	Yes	Yes	No	No
26	504 Service Provider	65	0	Yes	Yes	No	No	No	Yes	No	No
21	IT User		1	Yes	Yes	No	No	No	No	No	No
30	Recort Specialist		1	Yes	Yes	No	No	No	No	No	No
23	No Login		1	No	No	No	No	No	No	No	No

- 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.

**View User Type** **Special Educator (Teacher Edit)** (Management disabled between 9 AM and 5 PM) [New Mail!](#)

Name:	Special Educator (Teacher Edit)
Assoc with All Schools:	no
Assoc with All Grades:	yes
Can Be Teacher of Record:	Yes
Can Be Team Member:	Yes
Grades:	All

[View Permissions](#) | [View Document Permissions](#) | [View Report Permissions](#) | [View Event Permissions](#)  
[View Student Page Access](#) | [View Inactive Student Page Access](#)  
[View Group Page Access](#) | [View Parent Page Access](#) | [View Flexible Interface Access](#)

--- Service Logging Alerts set up for Special Educator (Teacher Edit) ---

Alerts will be sent to users with services scheduled on their My Calendar page when that log has not been entered and it is the configured number of days overdue. If Or Greater is checked, alerts will be sent for each day beyond the initial alert date that the log still has not been entered.

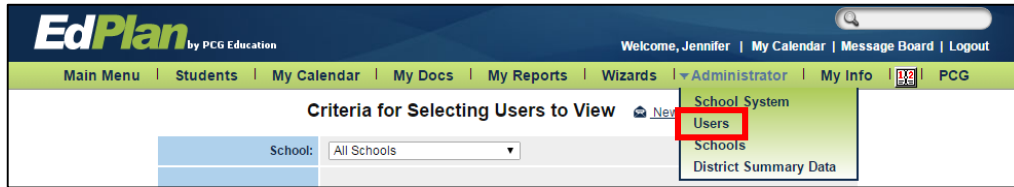
# Days Overdue	Or Greater
	No

## USERS TAB


### Changing a User's Password and Updating their Personal Information

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

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



The screenshot shows the 'Criteria for Selecting Users to View' page in detail. The 'School' dropdown is set to 'All Schools'. The 'User Type(s): (check none to match all)' section contains a list of checkboxes for various user roles, including 'State OK EdPlan Administrator', 'EdPlan/Easy/IEP Administrator (Admin Edit)', 'Certifying Specialist (Building Admin)', 'District-wide Consultant', 'School/District Lead (Admin Support Edit)', 'School Administrator (Build Admin Read)', 'Special Educator (Teacher Edit)', 'School Psychologist', 'Related Service Provider', 'Outside Provider/Contracted Providers', 'IEP Team Member No Login', 'School Staff (Teacher Read)', '504 District Admin', '504 School Admin', '504 Service Provider', 'IT User', and 'No Login'. Below this, there are search fields for 'User Last Name', 'User First Name', 'Title', and 'User ID', each with an 'Exact Match' checkbox. The 'User Last Name' field and its 'Exact Match' checkbox are highlighted with a red box. At the bottom, there are three buttons: 'View User(s)' (highlighted with a red box), 'View Previous Search Results', and 'Add New User'.

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

Select a User <a href="#">New Mail</a>							
Del	On Behalf Of	C/S	Name	School(s)	Students	Job Title	User Role
<input type="checkbox"/>			<a href="#">Admin Test</a>	-All-	7, 7	Director of Special Services	EdPlan/EasyIEP Administrator (Admin Edit)
<input type="checkbox"/>			<a href="#">Aggregate Test</a>	-All-	1, 2	Compliance/Monitor Coordinator	EdPlan/EasyIEP Administrator (Admin Edit)
<input type="checkbox"/>		<input type="radio"/>	<a href="#">Alicia Test</a>	TJE, FRE, JCE, JKMS, RRMS, GWH, SS, SS	0, 5	Psychologist	Psychologist 2014
<input type="checkbox"/>		<input type="radio"/>	<a href="#">Alicia 504 Test</a>	-All-	2, 3	General Education Teacher	504 District Admin

(4 Users)

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.

Name:	First	Middle	Last	Suffix
	<input type="text" value="Admin"/>	<input type="text"/>	<input type="text" value="Test"/>	<input type="text"/>
User Code:	<input type="text" value="AdminTest"/>			
Date of Birth:	<input type="text"/>			Gender: <input type="text"/>
Password:	<input type="text"/>			
Password (again):	<input type="text"/>			
Title:	<input type="text" value="Director of Special Services"/>			
Address:	<input type="text"/>			
City, State, ZipCode:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Home Phone:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Work Phone:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Receives Compliance Phone Alerts:	<input type="checkbox"/>			
E-Mail Address:	<input type="text"/>			

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.

User Type:	<input type="text" value="EdPlan/EasyIEP Administrator (Admin Edit) *"/>
School(s):	<b>Admin Test is associated with all schools</b>

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

## OK EdPlan™ - Administrator's Manual

'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)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Autism (AUT)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Blind (BL)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Deaf-Blindness (DB)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Deafness (DF)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Developmental Delay (DD)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Developmental Delay: Adaptive/Self Help (ASH)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Developmental Delay: Cognitive Development (CD)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Developmental Delay: Communication (CM)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Developmental Delay: Physical Development (PS)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Developmental Delay: Social-Emotional (SE)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Emotional Disturbance (EMN)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>
Functional Delay (FD)	<input type="checkbox"/>	<input type="text"/>		<a href="#">View</a>

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Service Certifications			
Special Ed Services			
Services:	Can Provide	Certified	Certifications
Special Education -SI	<input checked="" type="checkbox"/>		<a href="#">View</a>
Related Services			
Services:	Can Provide	Certified	Certifications
Audiology	<input type="checkbox"/>		<a href="#">View</a>
Counseling Services	<input type="checkbox"/>		<a href="#">View</a>
Interpreter	<input type="checkbox"/>		<a href="#">View</a>
Nursing Services	<input type="checkbox"/>		<a href="#">View</a>
Occupational Therapy	<input checked="" type="checkbox"/>		<a href="#">View</a>
Orientation & Mobility	<input type="checkbox"/>		<a href="#">View</a>
Physical Therapy	<input checked="" type="checkbox"/>		<a href="#">View</a>
Speech/Language	<input checked="" type="checkbox"/>		<a href="#">View</a>

### Adding New Users

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

Last Name:	<input type="text"/>	<input type="checkbox"/> Exact Match
First Name:	<input type="text"/>	<input type="checkbox"/> Exact Match
Job Title:	<input type="text"/>	<input type="checkbox"/> Exact Match
EdPlan User ID:	<input type="text"/>	<input type="checkbox"/> Exact Match
Sort List By:	User's Last Name ▼	
<a href="#">View User(s)</a> <a href="#">View Previous Search Results</a> <a href="#">Add New User</a>		

- 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,'

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'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.

Del	CP	Name	School(s)	Students	Title	User Type	E-mail Address
<input checked="" type="checkbox"/>		Chris Test	-All-	4, 3	Testing 96 Characters Testing 96 Characters Testing 96 Characters Testing 96 Characters Testing	Special Education Teacher	chris.test@asheville.k12.nc.us
<input type="checkbox"/>		Colin Test	-All-	0, 4	Test User	Speech Language Pathologist	ckell@pcus.com
<input type="checkbox"/>		Pratik Test	-All-	2, 1		Occupational Therapist	
<input type="checkbox"/>		SLP Test	-All-	0, 0		Speech Language Pathologist	
<input type="checkbox"/>		SLPA Test	-All-	0, 1		Speech Language Pathologist	
<input type="checkbox"/>		ot tests	-All-	0, 1		Occupational Therapist	

(6 Users)

**Inactivate Selected Users**

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.

### Delete User(s)

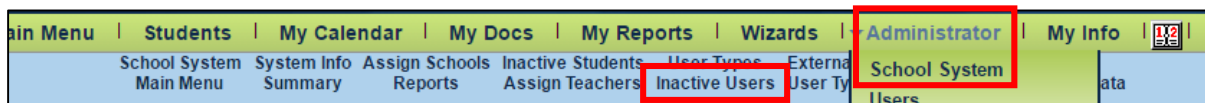
Please review the following list of users to be certain you want to inactivate these users

- 1. Chris Test (3754)

Yes, I'm sure
No, I changed my mind

### 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'

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**Criteria for Selecting Inactive Users to View** [New Mail!](#)

User Last Name:   Exact Match

User Code:   Exact Match

Sort List By: User's Last Name ▼


**View Inactive Users**

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

**Manage Inactive Users** [New Mail!](#)

User Code	Name	Title	Date Terminated
JTTEST	Jess Test	Special Educator Test	09/14/2015

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

Date Terminated:  

**Update the Database**

**Re-Activate this User in the Database**



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### 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.

**Select a User**

Del	CP	Name	School(s)	Students	Title	User Type	E-mail Address
<input checked="" type="checkbox"/>		Chris Test	-All-	4, 3	Testing 96 Characters Testing 96 Characters Testing 96 Characters Testing 96 Characters Testing	Special Education Teacher	<a href="mailto:chris.test@asheville.k12.nc.us">chris.test@asheville.k12.nc.us</a>
<input type="checkbox"/>		Colin Test	-All-	0, 4	Test User	Speech Language Pathologist	<a href="mailto:ckell@ncous.com">ckell@ncous.com</a>
<input type="checkbox"/>		Pratik Test	-All-	2, 1		Occupational Therapist	
<input type="checkbox"/>		SLP Test	-All-	0, 0		Speech Language Pathologist	
<input type="checkbox"/>		SLPA Test	-All-	0, 1		Speech Language Pathologist	
<input type="checkbox"/>		ot tests	-All-	0, 1		Occupational Therapist	

(6 Users)

[Inactivate Selected Users](#)

3. Scroll to the bottom and select 'Add an E-mail Alert'

[Update the Database](#)

[How to Add an E-mail Alert](#)

[View User Activity](#)

[View User Changes](#)

4. You will then select what 'Type' of alerts you would like to send to the user.

<p>Type:</p>	<input type="checkbox"/> -All- <input type="checkbox"/> Rejected IEP (10 Days or Greater) <input type="checkbox"/> Rejected Section 504 Eligibility (10 Days or Greater) <input type="checkbox"/> Referral <input type="checkbox"/> ISP <input type="checkbox"/> Rejected Section 504 Non-Eligibility (10 Days or Greater) <input type="checkbox"/> Eligibility <input type="checkbox"/> Rejected ISP (10 Days or Greater) <input type="checkbox"/> Proposed Section 504 Plan (10 Days or Greater) <input type="checkbox"/> Rejected Eligibility (10 Days or Greater) <input type="checkbox"/> Proposed Section 504 Eligibility (10 Days or Greater) <input type="checkbox"/> Section 504 Plan <input type="checkbox"/> Rejected Non-Eligibility (10 Days or Greater) <input type="checkbox"/> Section 504 Eligibility <input type="checkbox"/> Rejected Section 504 Plan (10 Days or Greater) <input type="checkbox"/> IEP
	<p><small>(If you select '-All-', don't select individual types)</small></p> <p>Send an alert for: <input type="text" value="Students that User is Teacher of Record for"/></p> <p>Number of Days Overdue: <input type="text" value=""/> <small>(Separate multiple values with a comma. Values may be negative. Types listed with day settings will ignore this field.)</small></p> <p><input type="checkbox"/> Also alert if Overdue more than any of these values</p>
	<p><a href="#">Update the Database</a></p>

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

## OK EdPlan™ - Administrator's Manual

### MY INFO 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. 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.

**Update Information** Angela Test [New Mail!](#)

Please enter your current password:  (required to make any changes on this page)

To change your current password, enter the new password in both of the following areas (See How to choose a good password)

**New Password:**

**New Password (to verify):**

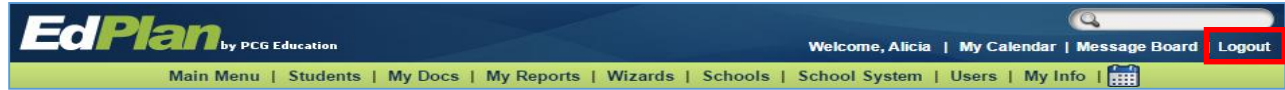
<b>Name:</b>	First	Middle	Last	Suffix
	Angela		Test	
<b>User Code:</b>	SesameT1			
<b>Title:</b>	Special Education Director			
<b>Address:</b>	<input type="text"/>			
<b>City, State, ZipCode:</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>Home Phone:</b>	<input type="text"/>			
<b>Work Phone:</b>	987-654-3210			
<b>E-Mail Address:</b>	<input type="text"/>			
<b>Calendar Synchronization:</b>	<input type="checkbox"/> Email Calendar Events to Outlook			
<b>Calendar Alerts:</b>	<input type="text"/> Minutes Before Calendar Events			

[Set My Forgotten Password Question](#)  
[Update the Database](#)

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.

## OK EdPlan™ - Administrator's Manual

### 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.