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ELIGIBILITY PROCESS

Select the ‘Eligibility Process’ tab to begin the development of the student’s Review of Existing Data (RED) and evaluation information. Each button within the “Eligibility Process” is integral to the entire process. Green check marks designate when pages have been completed and are error free, while ‘x’s’ designate an error or missing information on a page.
Review of Existing Data (RED)

1. From the Eligibility Process tab, click on the ‘Review of Existing Data (RED)’ page (highlighted below). The Review of Existing Data should be used in ANY of the following situations:

   a. Student is being initially considered for special education,
   b. Student is due for their three-year re-evaluation,
   c. Student is being considered for other or additional disability categories,
   d. Student has moved to Oklahoma from another state with a special education eligibility determination,
   e. Student is considered for a Functional Behavior Assessment, or
   f. Parent request.

**NOTE:** If you have received a **TRANSFER STUDENT** from within Oklahoma that does not have their current Eligibility event in OK EdPlan™, you do not have to complete the RED page and can move straight to the ‘Eligibility Determination’ page in the Eligibility Process.
2. Enter or use the calendar function to select the ‘Date of Review of Existing Data meeting’. This is the date that the district discusses and reviews the student’s existing data.

   ▪ Click on the calendar symbol to choose the date of the meeting or enter the date directly in the field.

3. Complete the ‘Specify Presenting Concerns’ section pertaining to the students, current concerns, and progress compared to that of other students of the same age and expected behaviors and skills. Select all that apply to this review.

   NOTE: When users select ‘Child is due for the reevaluation’ this will automatically drive the remaining page and will pre-fill some of the selections.

   ▪ Selecting ‘Other’ will require the user to type in the comment box to highlight any other presenting concerns.
If Grade Level and Rate of Progress are selected the additional indicators must be specified. These additional indicators can not be selected unless Grade Level and/or Rate of Progress are selected.

4. Select the Purpose of the data review:
   - Indicate whether the data review is for an Initial, Reevaluation, Out of State Transfer, or Functional Behavior determination.

   **NOTE:** User selection will dynamically change the remainder of the page and the required fields for completion

5. The ‘Background Information’ pertains to the child’s language and evaluation history, providing a baseline of what grades have been repeated and if any previous evaluations have taken place.

   **NOTE:** This section of information is required for ‘Initial’, ‘Reevaluation’, and ‘Functional Behavior’ data review types. If the user selects the ‘Out of State Transfer’ data review, this section will be hidden and will not be required.
OK EdPlan™ - Eligibility Manual

- The ‘Native Language/Mode of Communication’ and the ‘Primary Language of Home’ will prepopulate from the ‘Personal Page’ of the student and cannot be edited from this page. This information will come from the WAVE import; however, at this time the Personal Page is open for EdPlan™ Administrators to edit if that import fails.

- ‘Number of Schools Previously Attended’ is a drop down that will allow users to indicate (if known) how many schools, if any, that have been attended prior to this data review.

- ‘List Grade(s) Repeated’ is a multi-select option, allowing the user to check as many grades as appropriate for the particular student.

- ‘Remedial/Other School Services’ is a text field that will allow users to enter any information about other services that are or have been provided to the student.

- Information related to ‘Previous Individualized Evaluation(s)/Date(s)’ can be entered with text boxes and corresponding dates. If there are more than 3, click on the Add Assessments button to add additional evaluation and date fields.
6. The ‘Evaluation Data’ section will allow users select information that has been added on the ‘Evaluations’ tab to include on the Review of Existing Data (RED) document when it prints in Draft and Final Form.

   **NOTE:** When the review is for the Re-evaluation process, all evaluation information that has been entered in the EdPlan™ system will be available for inclusion. If this is an initial referral, users can elect whether to enter the evaluations (if available) on the ‘Evaluations’ tab or above in the ‘Previous Individualized Evaluation(s)/Date(s)’.

   - By checking the box in the column ‘Inc on RED’ the user is indicating they want the data to print to the RED document in both Draft and Final form.

7. The ‘Vision and Hearing Evaluation Information’ section collects information about the student’s evaluations for vision and hearing. If ‘Yes’ is selected, please explain is required. Please note the vision and hearing information prints to the RED and Eligibility Determination (MEEGS) document.

8. The ‘Service History’ section collects information about the student’s current and former special education and other services.

   **NOTE:** If “Reevaluation” is selected as the data review type, then the ‘Currently Receives Special Education Services’ section will pre-populate with the current special education Eligibility information from the student history page.
9. On the ‘Service History’ section of the RED page note, as shown in the following image, as you select responses to the questions, other fields will open and require information to be entered accordingly. Users should make sure that all information is completed.
- ‘Previously Received Special Education Services’ should be addressed if the student has received services before this data review. If this question is answered with ‘Yes’ the section for definition of Eligibility information will open to indicate the appropriate areas for Eligibility.

- The next sections are to capture information about whether the student ‘Currently Receives 504 Services’ or ‘Previously Receives 504 Services’ and, if yes, areas to explain what those services are or have been.

- ‘Student Received Sooner Start’ and ‘Student Received Other Intervention Services’ is to be addressed to indicate if the student had received early intervention services.

- ‘Service(s) Provided by Outside Professional / Agency’ allows a user to indicate any services that are or have been provided to the student by an outside provider.

10. The ‘Documentation of Interventions’ section of the page is REQUIRED if the suspected disability is Specific Learning Disability and the system will fire error messages upon ‘Save and Continue’ if that is the selection made by the team; however, this section is open on Initial and Re-evaluation reviews for data entry for any suspected disability category.
The ‘Targeted Behavioral/Skill’ section should be completed to include any information that has been collected about the targeted behavior or skill that has been addressed through the Response to Intervention work prior to the review.

Multiple ‘Goal(s)’, ‘Was Goal Accomplished’, and ‘Recommended Actions’ can be entered with text boxes and radio buttons as appropriate.

If there are more than three ‘Goal(s)’, click the button to enter as many additional goals as necessary.
- Any Interventions that have been implemented for the student prior to the data review can be entered in the ‘Interventions Attempted’ section and by clicking more text fields will open. All data entered on the page will print to the Draft or Final RED document when created.

- Enter the ‘Frequency and Duration’ and ‘Treatment Integrity Data’ related to all interventions in the appropriate text fields.

- Include information about the type of measure and expected outcome in the ‘Type of Measure Used to Define Outcome’ option. Use the following textbox to then further define the outcome.
11. The final section on the Review of Existing Data tab, 'Team/Group Recommended Action Based on the Review of Existing Data:' should be completed AFTER the team meeting or meeting with the parent.

- Once the team has determined that Additional Assessments are Necessary (for all review types including Initial, Re-evaluation, Out of State Transfer, and Functional Behavior) the date of parent consent will be entered in the 'Date of Consent for Evaluation' section. The Draft RED page can be created without this information; however, the final RED document will not be able to be created. This date will trigger the 45 day clock from permission to Eligibility Determination.

- If additional Assessments are necessary, click the radio button indication 'Additional Assessments are Necessary'. Any 'Additional Comments' related to the meeting or parent consent can be entered in the available text field.

- If the team determines that the data that was reviewed is sufficient for determination of initial or continuation of eligibility the 'No Additional Assessments Needed' radio button should be selected. The user will have to document the 'Justification/Recommendations:' if this is selected.

- Users must select any 'Suspected Primary Disability Category' that is determined as part of the meeting. This is a multi-select box that can allow one or more selection. Depending on the selection, other fields may open up for further indication and selection. Note in the image below the user has selected 'Multiple Disabilities' and 'Developmental Delay' which requires the indication of the 'Suspected Disability' and/or the 'Concomitant Disability(ies)'.

![Image of OK EdPlan™ - Eligibility Manual showing Team/Group Recommended Action Based on the Review of Existing Data section with highlighted fields for Date of Consent for Evaluation, Additional Assessments are Necessary, No Additional Assessments Needed, and Suspected Primary Disability Category options including Autism, Developmental Delay, etc.]
Create Written Notice and Parent Consent from RED page.

1. While you are working within the student’s RED page you can scroll to the bottom and click to create a draft and/or final written notice or parent consent document by clicking, the ‘Create Draft Written Notice’, ‘Create Final Written Notice’, ‘Create Draft Parent Consent’, or ‘Create Final Parent Consent’ buttons.

2. Once one of these documents have been created, you will see the document available for your review at the bottom of the RED page within the document generation table.

**Note:** This document will also, be available at the bottom of the ‘Eligibility Determination’ and the ‘Documents’ tab.
Discontinue Consent Timeline when Parent Revokes consent

1. There is now a revocation of consent button within the REDs page to discontinue the parent consent timeline. First, the RED document will have to be finalized within the parent consent event within the ‘Student History’ page.

2. Scroll to the bottom of the page and click on the ‘Parent is Revoking Consent for Evaluation’ button.

3. Fill out the information within the ‘Revocation of Consent’ page and click to ‘Save and Continue.’

4. Within the student’s ‘Student History’ tab you will see a “blue” event to show ‘Parent Consent Denial.’
Evaluations

The Evaluations page is designed to collect any evaluation information related to evaluations and assessments that have been or will be conducted on the student. Information from outside sources, internal district testing results, or any evaluation or observation data can be entered.

**NOTE:** Users can click on the symbol to collapse the assessments and clear up the page for easier reading. In the coming year PCG will auto collapse the assessments for all users going forward.

1. From the Eligibility Process tab, click on the ‘**Evaluations**’ page.

2. ‘**Observation Information**’ and ‘**Sociocultural Information**’ will now be addressed on the Evaluation page. Please note, you can click the Add More <Observation/Sociocultural:> data buttons to add another observation or sociocultural result.
3. Click on ‘Add Assessment’ One this has been chosen, the user can select up to four Assessments at a time from the ‘Add Assessment from a List’ dropdown. Users can add more than four but will only be able to add four at one time before the page is refreshed by selecting ‘Save’, or ‘Save and Continue’.

4. Once the Assessment has been selected the user is asked to select any and all assessment ‘areas’ that will be addressed through this measure. This is a multi select list and can accommodate as many selections as necessary to completely document the assessment being given.
NOTE: Users can also enter ‘Custom Assessments’ that will be or have been administered by entering the assessment name and then following the same steps to select the ‘assessment area’.

5. Once the user has selected the assessment that has been or will be administered and selected ‘Save and Continue’ they will be able to enter the ‘Assessment Date’, ‘Component Areas’ (subtests of the Method of Assessment), ‘Score Types’, and ‘Details’ about the assessment once complete.
6. Once the user has entered and selected the ‘Assessment Date’, ‘Component Areas’, and ‘Score Types’ they click on the ‘Details’ button and will be taken to the page where they will enter the scores, dates scored, and any ‘Assessment Narrative’ information and shown in the image that follows. Users are automatically provided two available entry sections but only have to report one level of scores. Scores are separated by component area.

- When complete the user can enter ‘Save and Continue’ to be carried back to the Evaluations landing page and can add more assessments or return from there to the main process page.
Eligibility Determination – MEEGS

- Initial Eligibility Determination (with or without further testing)
- Re-evaluation or change in disability (with or without further testing)
- Transfer from out of state (short term while further testing needs to be completed)
- Transfer from out of state (with no further testing)
- Transfer from inside OK for students who do not have eligibility dates in their history.
- De-Certification from Eligibility
- Parent Refusal of Services
- Non-Eligibility Determination after testing.

1. From the Eligibility Process click on the ‘Eligibility Determination’ button

2. Once the user has opened the page, if data has been entered and finalized through the ‘Review of Existing Data (RED)’ page the decisions will appear in the first section of the page labeled ‘Type of Evaluation Being Conducted’. Note on the screenshot below, this student has not had a finalized RED process and therefore does not have any information appearing in this section; however, the Draft and Final version of this document can be created without this information.

3. Users must enter the ‘Eligibility Determination Meeting Date’ prior to creating the FINAL version of the document. This date will drive the calculation of the three year, re-evaluation by the system. Because the Eligibility is a team
decision and should not be made in advance of the meeting with the parents and the team, users will not be able to finalize this document with a future date.

4. The next section that should be reviewed and completed during the team meeting will be the ‘Eligibility Determination’ section where users will respond to a series of six questions that will determine the student Eligibility for Special Education. Note in the example provided here the first question has been defaulted to N/A because it has not been indicated that this Eligibility determination is for Specific Learning Disability. If that is the team decision and it is included later in the process this field will open and allow the selection. All fields are required to complete a final version of the document.
5. On the ‘**Evaluation Data**’ section, users are able to indicate which assessment data needs to be included in the Eligibility Determination documentation by checking the box in the column marked ‘**Inc. on Doc**’. Because this table will grow as the student continues receiving Special Education Services, this is where the team will indicate what current and previous data was included in the determination decision.

![Evaluation Data Table]

6. Upon entering all the information on the page up to this point it is now time for the team to document the determination. This section is dynamic depending on the choices that are made. The image below depicts the table prior to a selection being made on the page. The Summary of Eligibility Determination Section is always required no matter what the determination of the team and will always be present for completion.

![Summary of Eligibility Determination]

**Based on information from a variety of sources that have been documented and carefully considered, the IEP team has determined:**

- [ ] This student is Eligible for Special Education because she meets the State of Oklahoma eligibility standards for the disability/disabilities indicated below.
- [ ] This student is being made eligible so commensurate services can be provided while further evaluation is being conducted to establish eligibility under Oklahoma Eligibility Standards.
- [ ] This student is Eligible for Special Education because she meets the State of Oklahoma’s eligibility standards for the following disabilities; however, the student’s parent/guardian is declining services. This student will not receive special education or related services.
- [ ] This student is Not Eligible for Special Education because she does not meet state standards for a disability.

**Summary of Eligibility Determination:**
7. If the user selects the ‘student is Eligible for Special Education’ they will be presented with the following section that will allow them to define the disability categories.

8. The following shows if the student is determined to have the primary disability of (a) **Specific Learning Disability** which requires the definition of **Deficit Areas**; (b) **Developmental Delay** which required the definition of a **Suspected Disability**; or (c) **Multiple Disabilities** which require the determination of the **Concomitant Disability(ies)**.
9. If the user selects the student is *being made eligible so commensurate services can be provided while further evaluation is being conducted* they will be required to identify the Disability category. The same applies here related to *Specific Learning Disability, Developmental Delay, or Multiple Disability(ies)* as when they would select typical eligibility.

**NOTE:** This Eligibility Event will only be valid for 30 days while testing and Eligibility is determined and an IEP is written if necessary.

10. If the user selects the student is *Eligible for Special education; however, the student’s parent is declining Eligibility* they will be required to enter the disability information and the same rules and actions will apply to *Specific Learning Disability, Developmental Delay, or Multiple Disability(ies)*.

11. If the student is determined to be Eligible for Special Education, the users are required to complete the two sections of ‘Educational Strengths’ and ‘Educational Needs’ in addition to the ‘Summary of Eligibility Determination’.

**EDUCATIONAL STRENGTHS: (Must be completed if child is eligible for special education and related services.)**

**EDUCATIONAL NEEDS: (Must be completed if child is eligible for special education and related services.)**
12. Finally, if the user selects the Student is not Eligible for Special Education then no further information is required and that student remains in the system as a general education student.

13. If the student is determined not eligible, the user will have to complete the section that documents ‘Educational Needs’ along with Recommendation(s) to fulfill the needs and the ‘Summary of Eligibility Determination’ sections that appear.

14. Once the user has completed all the information they can select one of the following actions:
   a. Click the button to return to Main Menu without saving;
   b. Click the button to save the work you have done and stay on this page; or
   c. Click the button to save the work you have done and return to Main Menu

2. After the user has saved all the information on the page by either selecting the ‘Save’ or ‘Save and Continue’ button the user can click the button to create a draft Eligibility Determination for review. At this time the checkbox for ‘Print the Comment Form’ can also be selected to print the ‘Comment Form’ when the Draft ‘Eligibility Determination Document’ prints to take the meeting with the team.

16. Following the meeting, the user can return to the system, adjust any of the data that was discussed and altered during the meeting, Click the ‘Save’ or ‘Save and Continue’ button to save all changes and check for errors and then select the button to create the event in the system and start the clock for the three year re-evaluation.

   NOTE: The ‘Create Final Eligibility Determination’ button will not appear for possible selection until all errors have been corrected on the page.

Create Written Notice from Eligibility Determination page.

1. While you are working within the student’s Eligibility Determination page you can scroll to the bottom and click to create a draft and/or final written notice document by clicking, the ‘Create Draft Written Notice’, ‘Create Final Written Notice’ buttons.
2. Once the document has been created, you will see the document available for your review at the bottom of the Eligibility Determination page within the document generation table.

**Note:** This document will also be available at the bottom of the ‘Eligibility Determination’ and the ‘Documents’ tab.

**Capture reasons for Exceeding Timeline when Initial Eligibility is over 45 days**

1. If, based on the ‘Parent Consent Date’ and the ‘Eligibility Determination’ date the user has exceeded the required 45 days to determine eligibility the section related to reason for delay will appear and require completion. Fill out the information needed for the ‘Acceptable Exemptions from Timeline Requirement’ or ‘Reasons for Delay (not acceptable exemptions from timeline requirement)’. You will not be able to finalize your Eligibility Determination document until this information is complete.