

OK EDPlan™

504 User Guide

Revised 2021



PUBLIC
CONSULTING GROUP

OK EDPlan™ - 504 Guide

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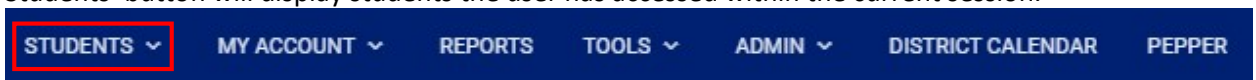
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2.0 System Features

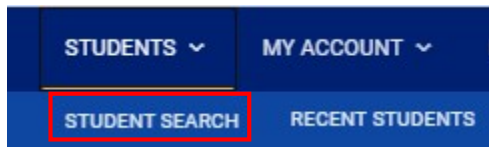
2.1 Student Searches

When searching for students, please remember that both regular education and special education students will be listed in EDPlan™. The system will only allow a certain number of students to appear on the screen at once. At this point users should narrow their search by choosing either General Ed or Section 504 Eligible and the beginning letters of the child’s last name. The student search screen will look different depending on each user’s permissions. 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 on the ‘Students’ button, and then ‘Student Search.’ The ‘Recent Students’ button will display students the user has accessed within the current session.




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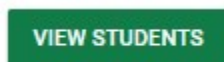
2. Enter search criteria, such as 'Student Last Name.' The search may also be narrowed by choosing the Grade Level, School, and/or Section 504 status.

Student Criteria [VIEW MY CASELOAD](#) [ADVANCED SEARCH](#)

<p>Grade Level <input type="text"/></p> <p>School <input type="text"/></p> <p><input type="text" value="Student Last Name"/> <input type="checkbox"/> Exact Match</p> <p><input type="text" value="Student First Name"/> <input type="checkbox"/> Exact Match</p> <p><input type="text" value="Student Middle Name"/> <input type="checkbox"/> Exact Match</p> <p><input type="text" value="STN"/> <input type="checkbox"/> Exact Match</p> <p><input type="text" value="Student ID"/> <input type="checkbox"/> Exact Match</p> <p>Date of Birth <input type="text" value="mm/dd/yyyy"/> </p> <p>Medicaid Status <input type="text"/></p>	<p>Status</p> <p><input type="checkbox"/> General Ed</p> <p><input type="checkbox"/> Referral</p> <p><input type="checkbox"/> Eligibility</p> <p><input type="checkbox"/> IEP</p> <p><input type="checkbox"/> Section 504 Referral</p> <p><input type="checkbox"/> Section 504 Plan</p> <p>Additional Program(s)</p> <p><input type="checkbox"/> Early Childhood Placement</p> <p>Sort By <input type="text"/></p>	<p><input type="checkbox"/> Child Study</p> <p><input type="checkbox"/> Evaluation</p> <p><input type="checkbox"/> Special Ed</p> <p><input type="checkbox"/> ISP</p> <p><input type="checkbox"/> Section 504 Eligible</p>
--	--	--

i To search for students with a range of last initials, such as students whose last names start with A, B, or C, enter "a...c." The ellipses tell the system to include the in-between letters in the search results.

3. Click 'View Students' for a list of students that meet the selected criteria.



4. The user may also choose to view students by clicking 'View My Caseload.'

[VIEW MY CASELOAD](#)

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

Select a Student PRINT RESULTS EXPORT RESULTS SEARCH AGAIN







Del	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 Begin	504 Plan Begin	504 Committee Chair	STN
<input type="checkbox"/>		06/12/2018	06/11/2021	06/12/2018	06/12/2019	FF	PK	Eugene Test	132495TEST	01/29/2016	5 Years	DD	Angela Test	03/07/2020			
		25/2015	10/25/2018	12/21/2016	03/21/2017	SS	02	Magic Johnson Test	MAGJTEST	07/01/2009	11 Years	HI	Chelsea Test	09/11/2019		Deborah Test	

i The information on this page can be sorted by clicking the column headers.

2.2 Compliance Symbols

Every student in EDPlan™ has a compliance symbol associated with their name. The compliance symbol can be found in two places in EDPlan, the 'Select a Student' page and the 'Eligibility Report' page of the 504 process for a particular student. When viewing a caseload, the compliance symbols are a quick way for users to see which students are in or out of compliance, as well as students who have approaching deadlines.

The most common compliance symbols are:

	No Eligibility or 504 information has been entered for this student, this usually denotes a regular education student.
	The student is fully compliant with all Section 504 Plan and Eligibility requirements.
	The student is Eligible and has a Section 504 Plan and will soon require that a new Section 504 Plan be written.
	The student is Eligible and has a Section 504 Plan, but is now past due to have a new one written and is now out of compliance.
	The student has been determined Eligible for Section 504 and will soon require their 3 year re-evaluation.
	The student has been determined Eligible for Section 504 but is past due for their 3 year re-evaluation and is out of compliance.

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3.0 EDPlan 504™ Process

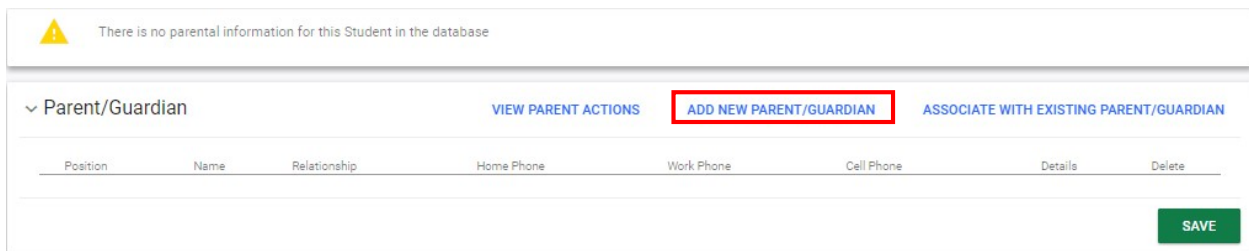
3.1 Parents/Team

3.1.1 Parents

1. Select the Parents/Team button from the blue menu bar.

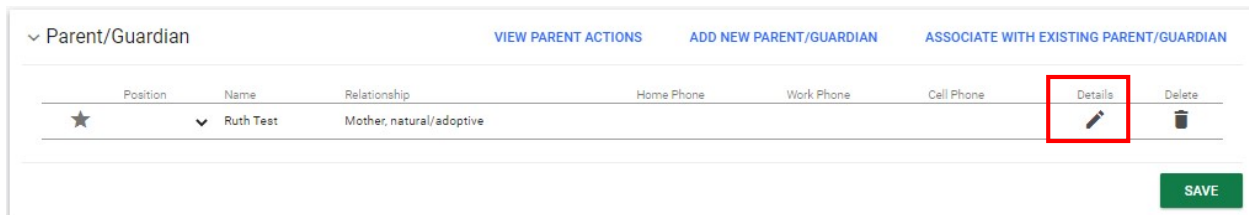


2. If there is no parent listed for the student, click 'Add New Parent/Guardian,' and enter the parent's information.



A screenshot of the 'Parent/Guardian' management interface. At the top, a yellow warning triangle icon is followed by the text: 'There is no parental information for this Student in the database'. Below this, there are three buttons: 'VIEW PARENT ACTIONS', 'ADD NEW PARENT/GUARDIAN' (highlighted with a red box), and 'ASSOCIATE WITH EXISTING PARENT/GUARDIAN'. Underneath is a table with columns: Position, Name, Relationship, Home Phone, Work Phone, Cell Phone, Details, and Delete. A 'SAVE' button is located at the bottom right.

3. If a parent is listed for the student, click 'Details' to verify that at least one parent is selected as 'Guardian' and 'Student Lives Here.'



A screenshot of the 'Parent/Guardian' management interface showing a table with one entry. The entry has a star icon in the 'Position' column, a dropdown arrow in the 'Name' column, 'Ruth Test' in the 'Name' column, 'Mother, natural/adoptive' in the 'Relationship' column, and empty cells for 'Home Phone', 'Work Phone', and 'Cell Phone'. The 'Details' column contains a pencil icon (highlighted with a red box) and the 'Delete' column contains a trash can icon. A 'SAVE' button is at the bottom right.

Edit Parent/Guardian

Demographic Information

Full Name
Ruth Test

Relationship
Mother, natural/adoptive

Student Lives Here

Guardian Responsibility

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4. Select the team the parent will be a part of. Depending on the user's access level, more than one team may be displayed. Select 'Include on Section 504 Team.'

Team Access

- Include on IEP Team
- Include on BP Team
- Include on Section504 Team

3.1.2 Team

1. Depending on the user's access level, more than one team may be displayed. Select the Section 504 button (if applicable), and select the Committee Chairperson from the drop list.

Section504 Team [SELECT SECTION504 TEAM](#)

Special Education BehaviorPlus **Section 504**

Committee Chairperson

Name	Relationship
------	--------------

[SAVE](#)

2. Other team members may be added by clicking the 'Select Section 504 Team' button.

Section504 Team [SELECT SECTION504 TEAM](#)

Special Education BehaviorPlus **Section 504**

Committee Chairperson

Name	Relationship
------	--------------

[SAVE](#)

3. Select any additional team members and Save.

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Other Users at Middle School B who can access Section504 Information

Search: _____

Select ↑↓	User Name ↑↓	Title ↑↓	View Only ↑↓
<input type="checkbox"/>	Lauren Byars		<input type="checkbox"/>
<input type="checkbox"/>	Andrew James		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Certifying Specialist Test	Certifying Specialist	<input type="checkbox"/>

Showing 1 to 3 of 3 entries

Previous | 1 | Next

Users at High School B who can access Section504 Information

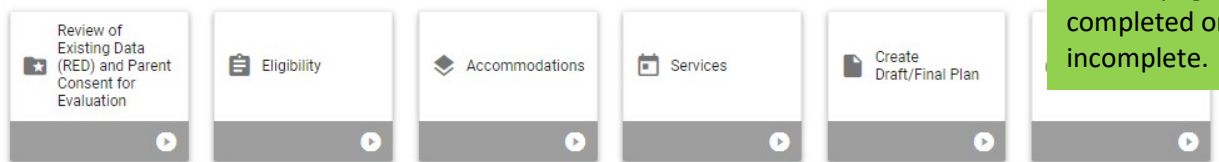
Search: _____

Select ↑↓	User Name ↑↓	Title ↑↓	View Only ↑↓
<input checked="" type="checkbox"/>	Marilyn Hill		<input type="checkbox"/>
<input type="checkbox"/>	Margaret Martinez		<input type="checkbox"/>

3.2 504 Process Landing Page

Selecting the 504 Process link will direct the user to the 504 Process landing page. EDPlan 504 is process driven, meaning once a section is completed, the user will be directed to the next section in the process. Each section of the process is represented by a tile on the 504 Process landing page. Clicking on a tile will direct the user to that page. As a section is completed, the tile will be green.

Section 504 Process



i When moving through EDplan, the tiles will turn green when a page has completed or red if incomplete.

3.3 Review of Existing Data (RED) and Parent Consent for Evaluation

1. Begin by entering the nature of the concern and responding Yes or No to the question that appears.



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∨ Review of Existing Data and Parent Consent for Evaluation

Nature of Concern

Describe

(Required)

1. Is there a suspected physical or mental impairment that substantially limits one or more of the student's major life activities?

Yes No

(Required)

2. If Yes is selected, the following fields will appear to be completed. Identify the suspected impairment(s), major life activity(ies), and whether additional evaluation data is required to determine eligibility for Section 504.

1. Is there a suspected physical or mental impairment that substantially limits one or more of the student's major life activities?

Yes No

(A) If Yes, identify the suspected physical or mental impairment(s)

Impairment(s)

(Required)

i A "physical impairment" means any physiological disorder or condition, cosmetic disfigurement, or anatomical loss affecting one or more of the following body systems: neurological; musculoskeletal; special sense organs; respiratory, including speech organs; cardiovascular; reproductive, digestive, genito-urinary; hemic and lymphatic; skin; and endocrine.

i A "mental impairment" means any mental or psychological disorder, such as mental retardation, organic brain syndrome, emotional or mental illness and specific learning disabilities.

(B) If Yes, identify one or more major life activity(ies) that is suspected the impairment(s) substantially limits

Describe

(Required)

i Examples of major life activities include: Walking, Performing manual tasks, Eating, Hearing, Seeing, Learning, Working, Caring for self, Speaking, Sleeping, Standing, Lifting, Bending, Concentrating, Breathing, Reading, Communicating and Thinking.

i A "major life activity" also includes the operation of a major bodily function, including but not limited to, functions of the Immune system, Normal cell growth, Digestive, Bowel, Bladder, Neurological, Brain, Respiratory, Circulatory, Endocrine, and Reproductive functions.

2. Is additional evaluation data required before determining the student's eligibility?

Yes No

(Required)

3. If Question 2 is also marked as Yes, the following fields will also appear. Describe the evaluation procedures and indicate if parent consent if for an initial evaluation or a reevaluation.



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2. Is additional evaluation data required before determining the student's eligibility?

Yes No

If Yes, identify the evaluation procedures (the type(s) of evaluation, assessment, information gathering or test information) needed

Describe

(Required)

If Yes, parent consent is being requested for

Initial Evaluation Re-Evaluation

(Required)

- Click 'Create Draft' to create a draft 504 Eligibility document, or 'Create Final' to create a final 504 Eligibility document. If parent consent is being requested, a Section 504 Review of Existing Data and Parent Consent document will be generated.

4.0 Eligibility

The 'Eligibility' page guides the user through a set of questions to establish a student's 504 eligibility.



To be eligible, students must have a physical or mental impairment and that impairment must substantially limit a major life activity. Answer every question. In Question 2, please indicate impairment when 'Other' is selected.



The Section 504 Eligibility Date and Projected Eligibility Date fields will populate once the user creates a final Eligibility Report Document at the end of the initial process.

Section 504 Eligibility Date

Proj Section 504 Eligibility Date

- Begin by describing why the student is being considered for Section 504 eligibility.

1. Why is the student being considered for Section 504 Eligibility?

Describe

(Required)

- Select 'Yes' or 'No' from the dropdown.

2. Does the student have a physical or mental impairment?

Select

(Required)

- Select the student's impairment(s) from the dropdowns for question three. If "Other" is selected as the impairment, then the "Details" field is required. The "Details" field may also be used to enter more detailed information for any impairment. For example, users may select "Cancer" and write "Leukemia" in the Details, or select "Allergy, Food-Other" and write in "Eggs, Dairy."



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3. What is/are the student's physical and/or mental impairment(s)?

Impairment	▼	Details
Impairment	▼	Details
Impairment	▼	Details
Impairment	▼	Details

4. Next, select which major Life Activities, if any, are affected. Provide further detail of the impact on the student in the 'Justification' text box.

▼ Major Life Activities

4. Does the student's impairment limit any of the following major life activities? Add all major life activities from the dropdown list that apply.

Life Activity	▼	Justification
Life Activity	▼	Justification
Life Activity	▼	Justification
Life Activity	▼	Justification

5. Next, select 'Yes' or 'No' in the dropdown to indicate whether the student's impairment substantially impacts a major life activity.

Does the student's physical or mental impairment substantially limit a major life activity?

Select ▼
(Required)

6. Enter a narrative to describe any evaluation procedures, tests, records, or reports used in the eligibility determination process.



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∨ Evaluation Procedure, Test, Record or Report(s) and other Supporting Documents

5. Identify each specific evaluation procedure, test, record, or report used to make this determination.

Describe

7. Next, enter information about any supporting documents. The 'Attached' field should be used to indicate if the documents will be attached to the student's record via the optional Paperless feature.

6. Supporting documents completed by

Name	Title	Date of Report mm/dd/yyyy		Attached	∨
Name	Title	Date of Report mm/dd/yyyy		Attached	∨

8. If there are any additional comments, enter them in Question 7.

7. Add additional Eligibility comments here

Describe

9. For question 8, select the appropriate answer. The first choice is the only one that makes a student eligible. The remaining choices describe reasons for non-eligibility determinations.

8. In accordance with Section 504 eligibility standards, this student

- Has a physical or mental impairment that substantially limits a major life activity and meets eligibility standards to be identified as having a Section 504 Disability.
- Does not have a physical or mental impairment at this time.
- Has a physical or mental impairment that does not substantially limits a major life activity at this time; student's needs will be met through an Individual Health Plan.
- Has a physical or mental impairment that substantially limits a major life activity but student's needs will be met through an IEP.
- Has a physical or mental impairment that substantially limits a major life activity but parent refuses services and/or accommodations.

(Required)

10. Once the page has been completed, click 'Save and Create Eligibility Document' which will generate the 504 Eligibility document. This document can also be generated from the student's Documents page. Clicking Save and Continue will check for errors on the Eligibility page. If all requirements have been satisfied, the user will advance to the 504 Accommodations page, which is the next page in the 504 Process.

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5.0 Services

After completing the 'Eligibility Report' page, the next section in the 504 process is where the student's Section 504 Service Plan content is determined.

1. Select 'Yes' or 'No' to the question of whether the student will receive services. If the student will not receive services, continue to Create Draft/Final Plan.

Will the student receive 504 services in addition to accommodations?

Yes

No

2. If the student will receive services, click 'Add Services.'

∨ Section 504 Services
ADD SERVICE
CLEAR ALL

i There are currently no Section 504 Services determined for this student

i *Select only those educational, related, and supplementary services needed to meet the student's individual educational needs as adequately as the needs of nondisabled students are met.

3. Select the appropriate services from the dropdown list or enter a custom service in the blank area below. Click 'Save' or 'Add Another Service.'

Custom Section 504 Service

Service ∨
(Required)

Provider ∨
(Required)

Number Sessions
(Required)

per ∨
(Required)

Session Length
(Required)

Unit of Time ∨
(Required)

Start Date
mm/dd/yyyy 📅
(Required)

End Date
mm/dd/yyyy 📅
(Required)

Location ∨
(Required)

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6.0 Accommodations

1. Select any State/District assessments in which the student will participate, and indicate the level of participation for each assessment.

∨ Participation in State/District

Include	Participation Area	Participation Level		
<input checked="" type="checkbox"/>	OSTP - Grade 3-8 ELA	<input type="checkbox"/> Not Applicable	<input checked="" type="checkbox"/> With Accommodations	<input type="checkbox"/> Without Accommodations
<input checked="" type="checkbox"/>	OSTP - Grade 3-8 Math	<input type="checkbox"/> Not Applicable	<input checked="" type="checkbox"/> With Accommodations	<input type="checkbox"/> Without Accommodations
<input type="checkbox"/>	OSTP - Grade 5 or 8 Science	<input type="checkbox"/> Not Applicable	<input type="checkbox"/> With Accommodations	<input type="checkbox"/> Without Accommodations
<input type="checkbox"/>	Grade 11 Science	<input type="checkbox"/> Not Applicable	<input type="checkbox"/> With Accommodations	<input type="checkbox"/> Without Accommodations
<input type="checkbox"/>	U.S. History	<input type="checkbox"/> Not Applicable	<input type="checkbox"/> With Accommodations	<input type="checkbox"/> Without Accommodations
<input type="checkbox"/>	ACT/SAT - Grade 11	<input type="checkbox"/> Not Applicable	<input type="checkbox"/> With Accommodations	<input type="checkbox"/> Without Accommodations
<input type="checkbox"/>	WIDA ACCESS 2.0	<input type="checkbox"/> Not Applicable	<input type="checkbox"/> With Accommodations	<input type="checkbox"/> Without Accommodations
<input type="checkbox"/>	Workkeys	<input type="checkbox"/> Not Applicable	<input type="checkbox"/> With Accommodations	<input type="checkbox"/> Without Accommodations

2. To add accommodations to multiple assessment areas, click 'Add Accommodations.'

∨ State/District Accommodations

[ADD ACCOMMODATIONS](#) [CLEAR ALL](#)

∨ OSTP - Grade 3-8 ELA [EDIT/ADD ACCOMMODATIONS](#)

∨ OSTP - Grade 3-8 Math [EDIT/ADD ACCOMMODATIONS](#)

3. Select the accommodations that are appropriate for the student, then select the State/District assessments for which the student requires the accommodation. The selected accommodation can be applied to all of the assessment areas, or select only the assessment areas in which the accommodation is needed.

<input type="checkbox"/> R4. Test Administrator monitors placement of student responses on the answer document or the Online Testing Client.	<input type="checkbox"/> R5. Braille/Secure, Braille Note-taker/Abacus.	<input checked="" type="checkbox"/> S1. Individual testing.
<input type="checkbox"/> S6. Provide adaptive or special furniture.	<input type="checkbox"/> S2. Small group testing (8-10 maximum).	<input type="checkbox"/> S3. Preferential seating.
<input type="checkbox"/> T3. Allow frequent breaks during one test session (maximum 10-15 duration).	<input checked="" type="checkbox"/> S4. Separate location.	<input type="checkbox"/> S5. Provide special lighting.
	<input checked="" type="checkbox"/> T1. Flexible schedule same day.	<input type="checkbox"/> T2. Administer test over several sessions or "chunking" (except writing tasks/sections).

S1. Individual testing.

Select [CHECK ALL](#) [CHECK NONE](#)

OSTP - Grade 3-8 ELA

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- You may also edit or add accommodations for each assessment area individually. Click 'Edit/Add Accommodations.'

OSTP - Grade 3-8 ELA

EDIT/ADD ACCOMMODATIONS

- Select all accommodations appropriate for the assessment area, then click 'Save.'

State/District OSTP - Grade 3-8 ELA

Select State/District Accommodation(s)

<input type="checkbox"/> NS1. ELA/Reading Read-Aloud Accommodation (may select at time of IEP for use on district assessments, but must obtain OSDE approval for use on state assessment).	<input type="checkbox"/> NS2. Unique Accommodations (require prior OSDE approval).	<input type="checkbox"/> P1a. Large print version.
<input type="checkbox"/> P1b. Contracted braille version.	<input type="checkbox"/> P1c. Large print through online testing client.	<input type="checkbox"/> P2. Reverse color contrast.
<input type="checkbox"/> P3. Use of assistive technology (AT) devices or supports.	<input type="checkbox"/> P4a. Text-to-Speech built into online testing client (Math, Science, U.S. History, Grade 5 & 8 ELA writing sections only).	<input type="checkbox"/> P4b. Human Reader (Math, Science, U.S. History, Grade 5 & 8 ELA writing sections only).
<input type="checkbox"/> P4c. Sign Language Interpretation (Math, Science, U.S. History, Grade 5 & 8 ELA writing sections only).	<input type="checkbox"/> P5. Use of Secure Braille Note-taker.	<input type="checkbox"/> P6. Simplification/repetition/signage of directions.
<input type="checkbox"/> P7. Turn off Universal Tools/Accessibility Features.	<input type="checkbox"/> P8. Use of an Abacus.	<input type="checkbox"/> P9. Use a calculator on Grades 3-5 Mathematics.
<input type="checkbox"/> P10. Provide cues (arrows, stop signs) on answer form.	<input type="checkbox"/> P11. Use masking or templates to reduce the amount of visible print.	<input type="checkbox"/> P12. Secure paper to work area with tape or magnets.
<input type="checkbox"/> P13. Student may read the test aloud or sign the test to himself or herself.	<input type="checkbox"/> P14. Placeholders, template, or markers to maintain place.	<input type="checkbox"/> P15. Audio calculator.
<input type="checkbox"/> P16. Paper & Pencil test.	<input type="checkbox"/> R1. Student marks answers in test book and not on an answer document, for later transfer by a Test Administrator to an answer document.	<input type="checkbox"/> R2a. Student dictates response to a scribe who records responses on an answer document or through the Online Testing Client by Test Administrator/Proctor.
<input type="checkbox"/> R2b. Student signs response to a	<input type="checkbox"/> R2c. Student tapes or records	<input type="checkbox"/> R3. Student utilizes an electronic

CLOSE **SAVE**

- Click 'Save and Continue.'
- Repeat this process to add Class/Activity accommodations.

7.0 Creating Section 504 Student Plan

The final step in this process is to create the student's 504 Plan. There are additional documents that may also be created on the 'Create Draft/Final' tab, as well as on other 504 Process pages.



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1. Select the Meeting Purpose and enter the name of the person who will oversee the implementation of the 504 plan. Enter the meeting date and the begin/end dates of the 504 plan.

504 Information

Meeting Purpose ▼	Section 504 Plan Meeting Date mm/dd/yyyy
Person Responsible for overseeing implementation of the 504 Student Plan	Date this Section 504 Plan Begins mm/dd/yyyy
	Date this Section 504 Plan Ends mm/dd/yyyy

1. The Demographic and Parent panel will display the student’s demographic information. Select the parent who will be included on the 504 plan document.

▼ Demographic and Parent

Student Name A B Test	Grade 02	District ID 2454	State Testing Number (STN)	DoB 08/01/2009	Age 11
Gender M	Native Language	Ethnicity White	School A School		
Select Parent/Guardian to include on 504 document					
<input checked="" type="checkbox"/> Parents Test (Guardian Responsibility, Student Lives Here)					

2. The 504 Team panel will display the student’s 504 team. To add or edit team members, return to the Parent/Team page and make any necessary updates.

▼ 504 Team

Committee Chairperson Bob Test	
Team Member School Admin Test	Relationship
Team Member Certifying Specialist Test	Relationship OT

i The participants that appear automatically pull from the list of individuals entered on the Parent/Team page.

3. Additional participants may be added in the Meeting Participants panel. The student, parent(s), and team members selected on the Parent/Team page will display. Additional participants may be added by entering their name in the Team Member field.



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Committee Chairperson
Bob Test

Team Member
School Admin Test

Team Member
Cerifying Specialist Test

Team Member

Team Member

4. You may save your data, check for errors, or create a draft plan.

DISPLAY 504 ERRORS
CREATE DRAFT
CREATE FINAL
SAVE

5. Once all errors are cleared, create the final plan.

DISPLAY 504 ERRORS
CREATE DRAFT
CREATE FINAL
SAVE

6. The document will then display in the Documents table. Other documents, such as 504 Meeting Invitation and 504 Written Notice, can also be created by clicking the links at the top of the Documents table.

[Documents](#)
[CREATE INFORMATION AND PROCEDURAL SAFEGUARDS](#)
[CREATE 504 MEETING INVITATION](#)
[CREATE 504 WRITTEN NOTICE](#)
[ATTACH DOCUMENTATION](#)
[UPLOAD ATTACHMENT](#)

Doc ID	Date Generated	Generated By	Document	Status	Include in Batch	Attachment
6634	04/07/2021	Jill Burroughs	504-Student Plan	Draft	<input type="checkbox"/>	
6623	04/01/2021	Alicia M Test	Sample COSF Document	Uploaded		
6603	03/30/2021	Jill Burroughs	504-Invitation to Meeting Section 504/Title II	Final	<input type="checkbox"/>	
6601	03/30/2021	Jill Burroughs	504-Written Notice to Parents Section 504/Title II	Final	<input type="checkbox"/>	
6600	03/30/2021	Jill Burroughs	504-Invitation to Meeting Section 504/Title II	Final	<input type="checkbox"/>	

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7.1 *Electronic Signature*

The electronic signature feature is available for the 504 Student Plan. The electronic signature boxes display on 'Create Final,' which is available once all errors have been cleared.

1. After a draft document has been created, select 'Create Final.'
2. Click the arrow to expand the signature section of the modal.

Create Final Section 504 Plan



Electronic Signatures can be collected by expanding the section below. Signatures should only be collected (and will only be generated).

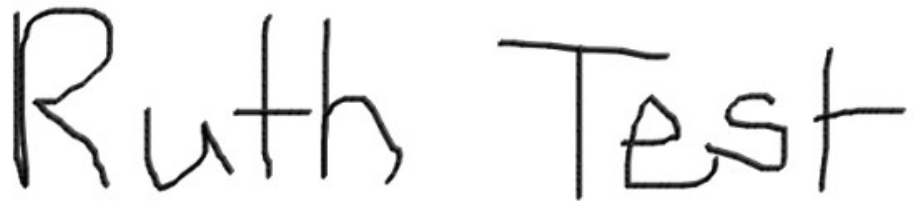


REMINDER: Creating a final of this document will generate a notification to the parent/guardian through EDPlan Connect parent/guardian. If you would like to proceed with creating a final, click 'Create Final.' If you would not like to create a final, click 'Cancel Final.'

> Electronic Signatures

3. Team members can sign the document electronically, either with a mouse, stylus, or on a touch screen computer.

Parent/Guardian
Ruth Test



CLEAR SIGNATURE

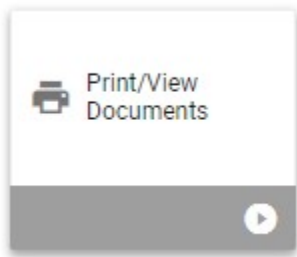
4. Once all signatures have been collected, click 'Create Final.'

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7.2 Batch Printing

Batch printing is a functionality that allows users to select specific documents and print them all together, as opposed to selecting each individual document and printing it separately. Batch printing can be done from several pages within the 504 Process, from the student's Documents page, or from My Docs. To print documents in a batch from the 504 Print/View Documents page:

1. Select Print/View Documents from the 504 Process landing page.



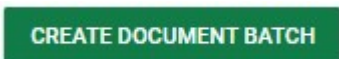
2. Check the box next to each document to be viewed/printed in the column labeled 'Batch.'

i An 'E' in the Delete column indicates that the document is associated with an Event. A 'C' in the 'Delete' 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.

Delete	Doc ID	Date Generated	Generated By	Document	Status	Include in Batch	Attachment
<input type="checkbox"/>	6634	04/07/2021	Jill Burroughs	504-Student Plan	Draft	<input type="checkbox"/>	
<input type="checkbox"/>	6623	04/01/2021	Alicia M Test	Sample COSF Document	Uploaded	<input type="checkbox"/>	
<input type="checkbox"/>	6603	03/30/2021	Jill Burroughs	504-Invitation to Meeting Section 504/Title II	Final	<input type="checkbox"/>	
<input type="checkbox"/>	6602	03/30/2021	Jill Burroughs	504-RED	Final	<input type="checkbox"/>	
<input type="checkbox"/>	6601	03/30/2021	Jill Burroughs	504-Written Notice to Parents Section 504/Title II	Final	<input type="checkbox"/>	
<input type="checkbox"/>	6600	03/30/2021	Jill Burroughs	504-Invitation to Meeting Section 504/Title II	Final	<input type="checkbox"/>	
<input type="checkbox"/>	6599	03/30/2021	Jill Burroughs	504-Med Report	Final	<input type="checkbox"/>	Consent for Release of Confidential Information
<input type="checkbox"/>	6599	03/30/2021	Jill Burroughs	504-Med Report	Final	<input type="checkbox"/>	Sample COSF Document
<input type="checkbox"/>	6556	03/09/2021	Jill Burroughs	504-RED	Final	<input type="checkbox"/>	

Note: Uploaded documents and attachments will not be included in batch printing.

3. Click the 'Create Document Batch' button. All documents that were selected will open as one single PDF file in Adobe.



4. To print these documents, use the 'Print' icon on the Adobe toolbar.



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6.0 Reports Overview

6.1 Student Report

The 504 – Student Report can be used to see a wide variety of student related Section 504 information. This report has six output options which will provide specific information including dates for 504 Eligibility and Service Plan reevaluations, Services, Accommodations and much more.

Report Creation Page report parameters/filters:

- 'Date' selection takes a snapshot of student information as of a specified date
- 'Report Option' selections change the output fields for Section 504 information. Please see definition of options listed below
- 'Eligibility Determination Status' selections filter student populations based on their 504 eligibility
- 'Active Status' selections filter students to include Active and/or Inactive Students filters
- 'Report Summary' will output a summary of student information as selected

Option Definitions:

- Eligibility: displays Eligibility and Service Plan Start and End Dates
- Exited from District: displays the Exit Date and Exit User
- Moved within District: displays the number of Times Moved within district and originating School
- Parents/Guardians: displays Parent/Guardian Mailing Address, Contact Information, if the Student Lives Here, Guardian Responsibility, and Parents on 504 Team
- Services: displays data relating to the documented Services
- Accommodations: displays data relating to the documented Accommodations