OK EDPlan™

504 User Guide

Revised 2021

PUBLIC
CONSULTING GROUP

OK EDPlan™ - 504 Guide

# 1.0 Table of Contents

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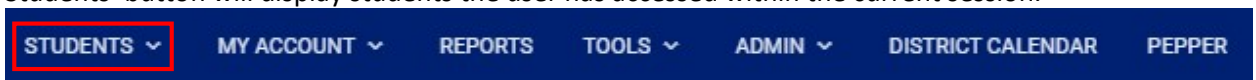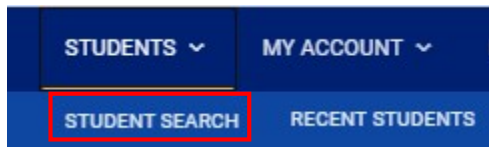
2. Enter search criteria, such as 'Student Last Name.' The search may also be narrowed by choosing the Grade Level, School, and/or Section 504 status.

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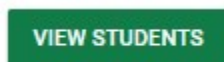
4. The user may also choose to view students by clicking 'View My Caseload.'

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

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.
5	The student in fully compliant with all Section 504 Plan and Eligibility requirements.
504	The student is Eligible and has a Section 504 Plan and will soon require that a new Section 504 Plan be written.
504	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.
5T	The student has been determined Eligible for Section 504 and will soon require their 3 year re-evaluation.
5T	The student has been determined Eligible for Section 504 but is past due for their 3 year re-evaluation and is out of compliance.

3.0 EDPlan 504™ Process
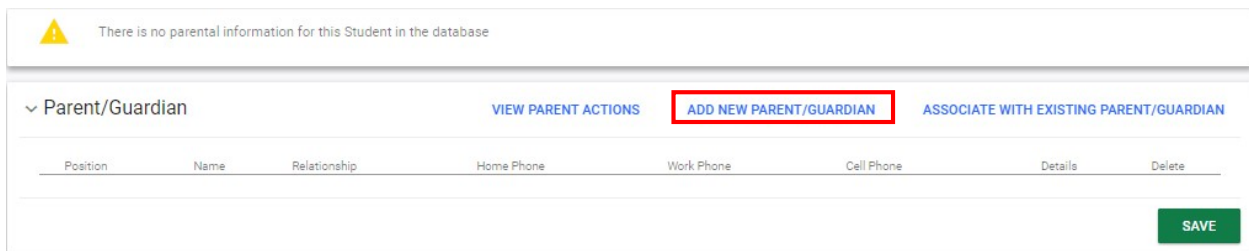
3.1 Parents/Team

3.1.1 Parents

1. Select the Parents/Team button from the blue menu bar.
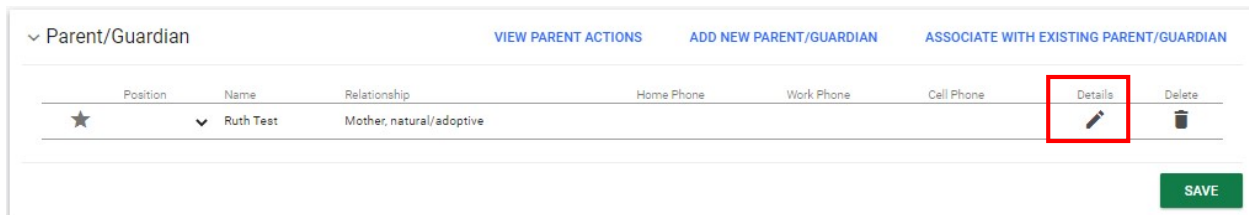
2. If there is no parent listed for the student, click 'Add New Parent/Guardian,' and enter the parent's information.

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.'

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.'

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.

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

3. Select any additional team members and Save.

Other Users at Middle School B who can access Section504 Information

Search: _____

Select ⬍	User Name ⬍	Title ⬍	View Only ⬍
☐	Lauren Byars		☐
☐	Andrew James		☐
☑	Certifying Specialist Test	Certifying Specialist	☐

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 ⬍
☑	Marilyn Hill		☐
☐	Margaret Martinez		☐

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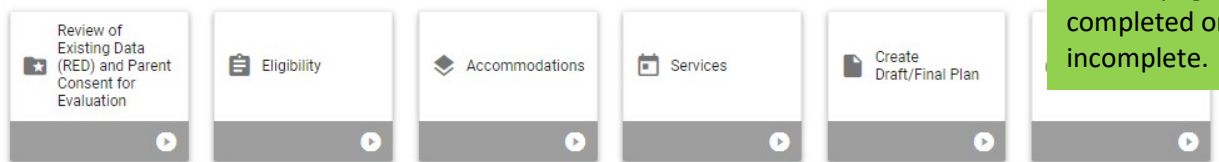
🛈 When moving through EDplan, the tiles will turn green when a page has completed or red if incomplete.

Section 504 Process

Review of Existing Data (RED) and Parent Consent for Evaluation	Eligibility	Accommodations	Services	Create Draft/Final Plan	
▶	▶	▶	▶	▶	▶

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.

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.

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.

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)

4. 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.

Section 504 Eligibility Date   Proj Section 504 Eligibility Date
....

> ⓘ 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.

1. 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)

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

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

Select   ⌄
(Required)

3. 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."

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.

> ∨ 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.

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
>
> ⓘ   There are currently no Section 504 Services determined for this student
>
> ⓘ   *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 ⌄   Provider ⌄
> (Required)   (Required)
>
> Number Sessions   per ⌄
> (Required)   (Required)
>
> Session Length   Unit of Time ⌄
> (Required)   (Required)
>
> Start Date   End Date
> mm/dd/yyyy 🗓   mm/dd/yyyy 🗓
> (Required)   (Required)
>
> Location ⌄
> (Required)

6.0 Accommodations

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

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

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

✓ OSTP - Grade 3-8 ELA   EDIT/ADD ACCOMMODATIONS

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

State/District OSTP - Grade 3-8 ELA   ✕

Select State/District Accommodation(s)

☐ 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).

☐ NS2. Unique Accommodations (require prior OSDE approval).

☐ P1a. Large print version.

☐ P1b. Contracted braille version.

☐ P1c. Large print through online testing client.

☐ P2. Reverse color contrast.

☐ P3. Use of assistive technology (AT) devices or supports.

☐ P4a. Text-to-Speech built into online testing client (Math, Science, U.S. History, Grade 5 & 8 ELA writing sections only).

☐ P4b. Human Reader (Math, Science, U.S. History, Grade 5 & 8 ELA writing sections only).

☐ P4c. Sign Language Interpretation (Math, Science, U.S. History, Grade 5 & 8 ELA writing sections only).

☐ P5. Use of Secure Braille Note-taker.

☐ P6. Simplification/repetition/signage of directions.

☐ P7. Turn off Universal Tools/Accessibility Features.

☐ P8. Use of an Abacus.

☐ P9. Use a calculator on Grades 3-5 Mathematics.

☐ P10. Provide cues (arrows, stop signs) on answer form.

☐ P11. Use masking or templates to reduce the amount of visible print.

☐ P12. Secure paper to work area with tape or magnets.

☐ P13. Student may read the test aloud or sign the test to himself or herself.

☐ P14. Placeholders, template, or markers to maintain place.

☐ P15. Audio calculator.

☐ P16. Paper & Pencil test.

☐ R1. Student marks answers in test book and not on an answer document, for later transfer by a Test Administrator to an answer document.

☐ R2a. Student dictates response to a scribe who records responses on an answer document or through the Online Testing Client by Test Administrator/Proctor.

☐ R2b. Student signs response to a

☐ R2c. Student tapes or records

☐ R3. Student utilizes an electronic

CLOSE   SAVE

6. Click 'Save and Continue.'
7. 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.

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

☑ 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 Cerifying 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.

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	☐	
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	☐	
6601	03/30/2021	Jill Burroughs	504-Written Notice to Parents Section 504/Title II	Final	☐	
6600	03/30/2021	Jill Burroughs	504-Invitation to Meeting Section 504/Title II	Final	☐	

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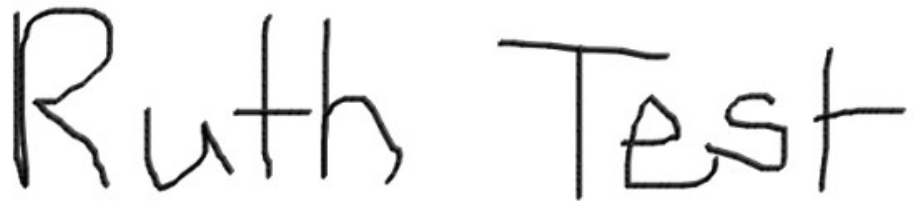
⚠️ REMINDER: Creating a final of this document will generate a notification to the parent/guardian through EDPlan Connec parent/guardian. If you would like to proceed with creating a final, click 'Create Final.' If you would not like to create a fin

> Electronic Signatures

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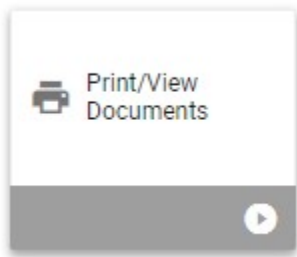
Parent/Guardian
Ruth Test

CLEAR SIGNATURE

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

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:

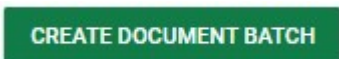1. Select Print/View Documents from the 504 Process landing page.

.

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

   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.

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