OK EDPlan™

IEP Guide

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PUBLIC CONSULTING GROUP

OKLAHOMA Education

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OK EDPlan™ - IEP Guide

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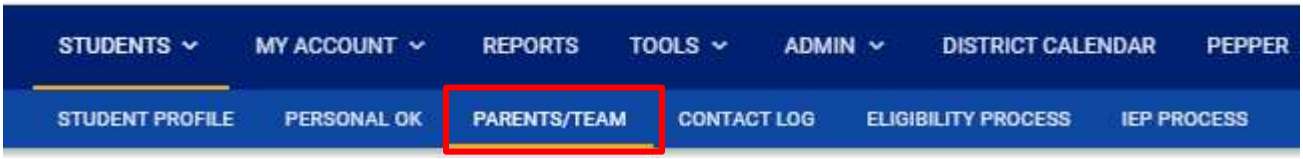
Parents and IEP Team Members

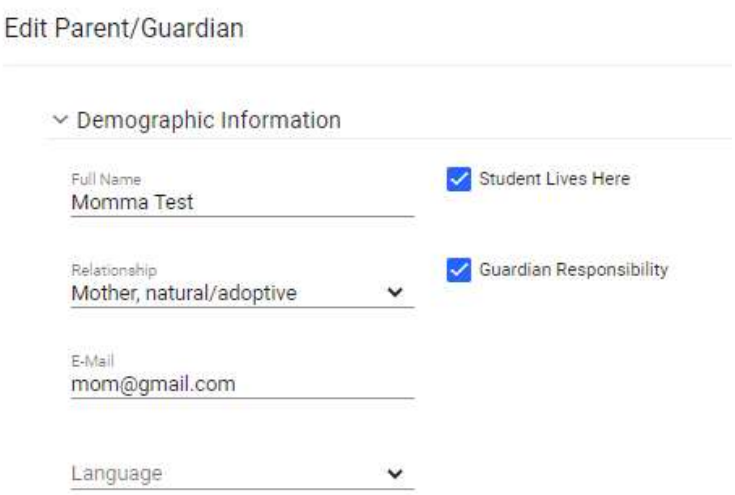
From the Student menu, select the Parents and IEP Team Members page to add parents, guardians and IEP team members.



Editing a Parent/Guardian

1. Select 'Details.'

2. This will open the Parent panel so parent information can be edited.

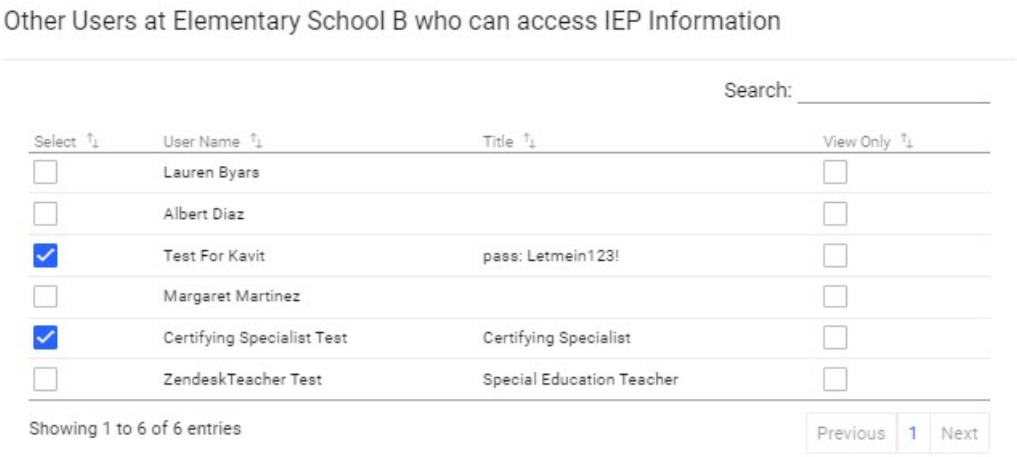


3. The 'Student Lives Here' and 'Guardian Responsibility' options must be checked for at least one parent/guardian. This is required to finalize the IEP. Select the 'Include on IEP Team' if the parent/guardian is part of the IEP Team. **NOTE:** If this is not selected for one or more parents/guardians, then there will not be a drop list for you to choose from within some of the document creation pages.
4. Select the 'Save' button when all parent/guardian information is added and return to the previous page.

Team Members

1. The 'Teacher of Record' is assigned by using the drop list.
2. Parents are shown as IEP Team Members, if the box 'Include on IEP Team' is checked on the Parents tab.
3. To add an IEP Team Member, click 'Select IEP Team.

4. Select any additional team members from the list displayed.



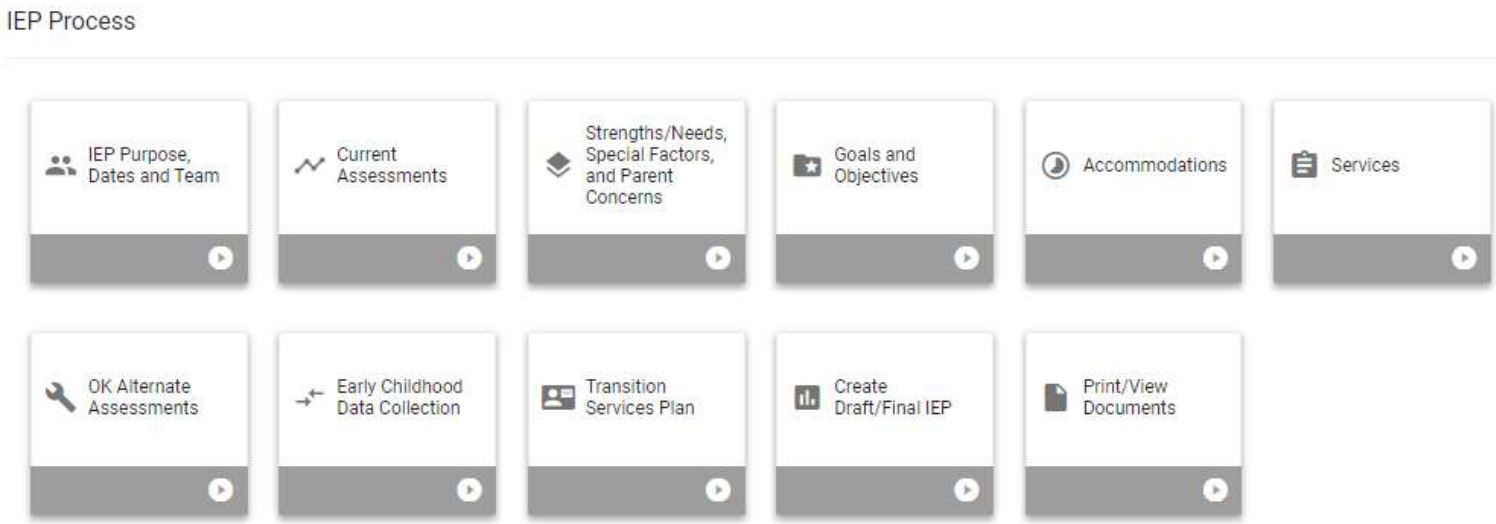
4. To allow 'View Only' permissions, which will not allow the user to make edits to the student's record, check the 'View Only' box to the right of the team member's name.
5. Select the 'Save' button when all IEP Team members are added.

IEP Process

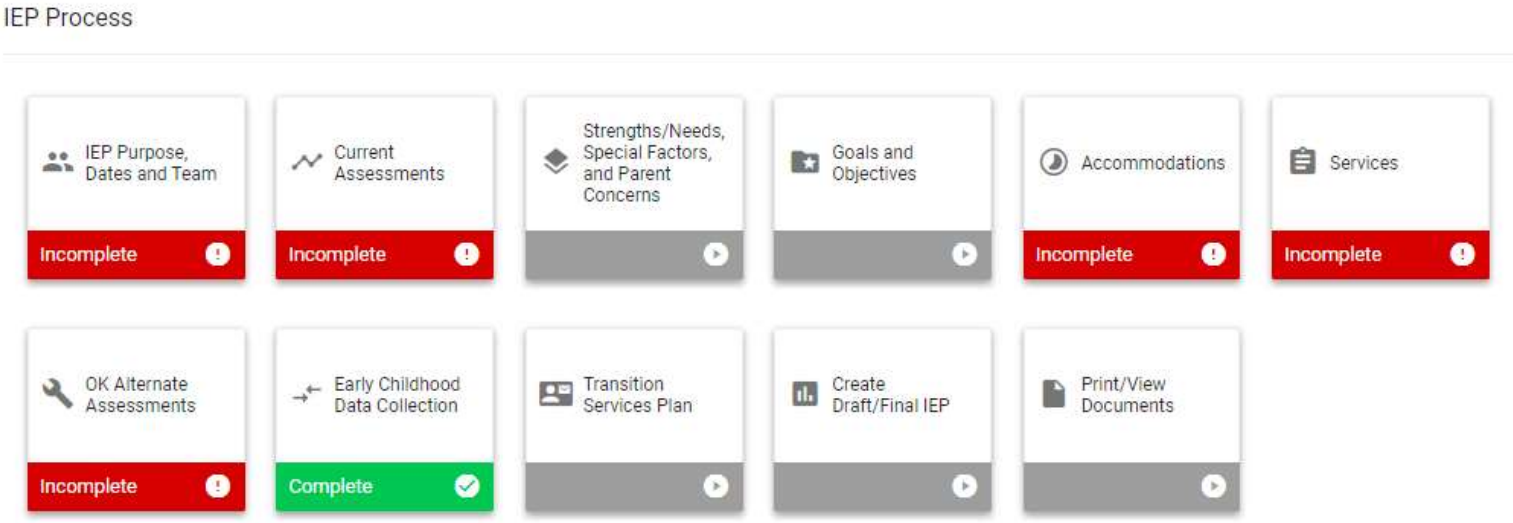
The 'IEP Process' tab will guide you through creating the IEP.

IEP Process Landing Page

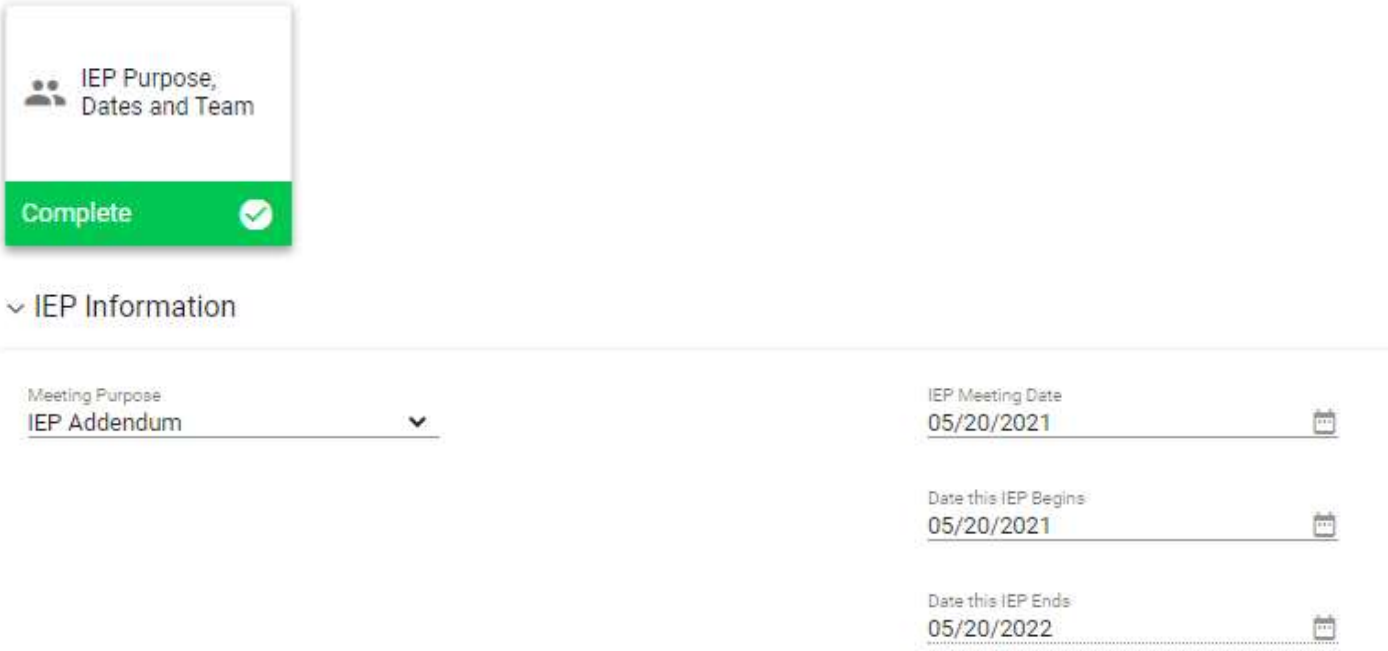
1. From the Student Menu, click on the "IEP Process" tab.



2. As you complete each 'tile' the section will turn green if completed correctly or will turn red if information is missing or conflicting data has been entered.



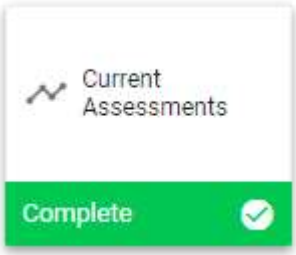
IEP Purpose, Dates and Team



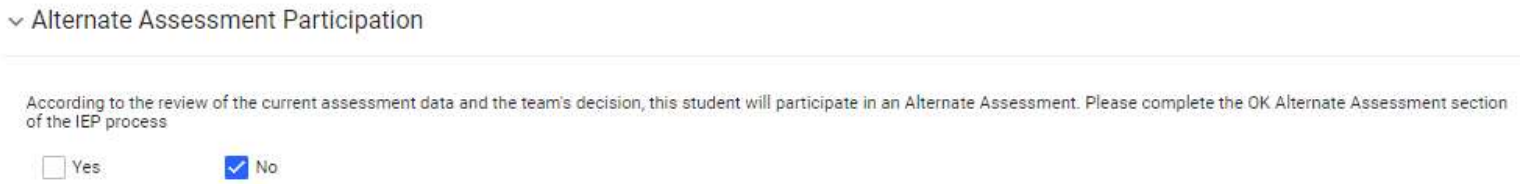
1. Select the meeting purpose. Note the meeting purpose option, 'In State Transfer." This will be used to accept the IEP of a student moving in from another district within the state.
2. Enter the IEP Meeting Date. If the meeting purpose is Initial, the IEP Meeting date will prepopulate with today's date.
3. Enter the IEP Begin Date. If the IEP is an initial, the IEP Begin Date will prepopulate with today's date.
4. Enter the IEP End Date. For an initial IEP, the end date will prepopulate with one year from today. For meeting purposes of IEP Addendum and In State Transfer, the IEP End Date will not be editable.
5. Click 'Save.'

Current Assessments

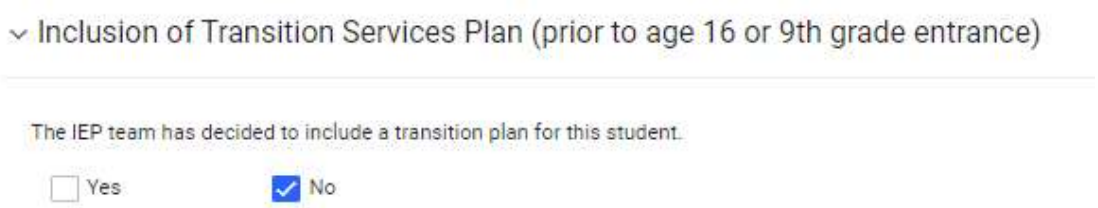
From the IEP Process tab, select the 'Current Assessments' link to add data to that section of the IEP.



1. Select ‘Yes’ or ‘No’ to indicate if this student will participate in an ‘Alternate Assessment’.



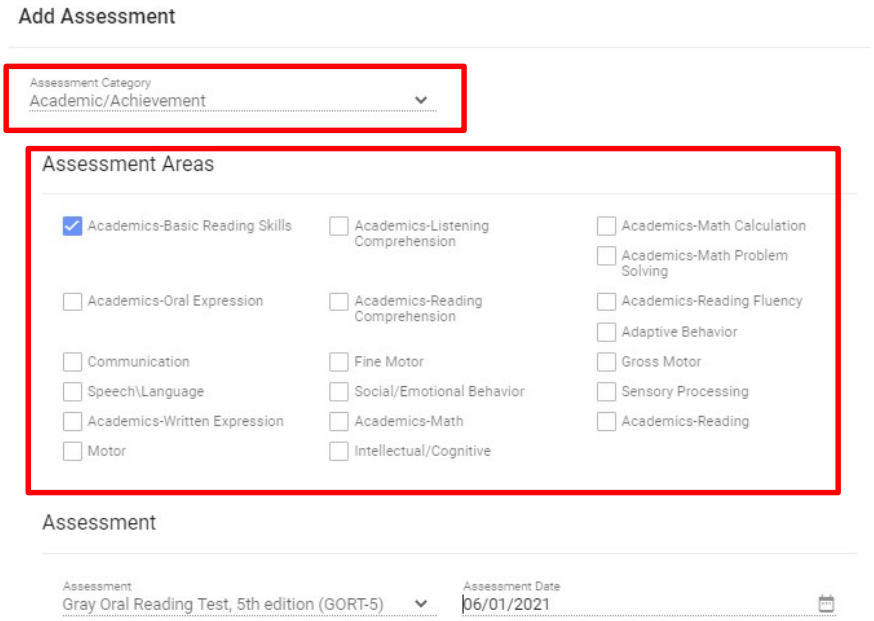
2. Select ‘Yes’ or ‘No’ to indicate if the IEP team has decided to include a transition services plan for this student.



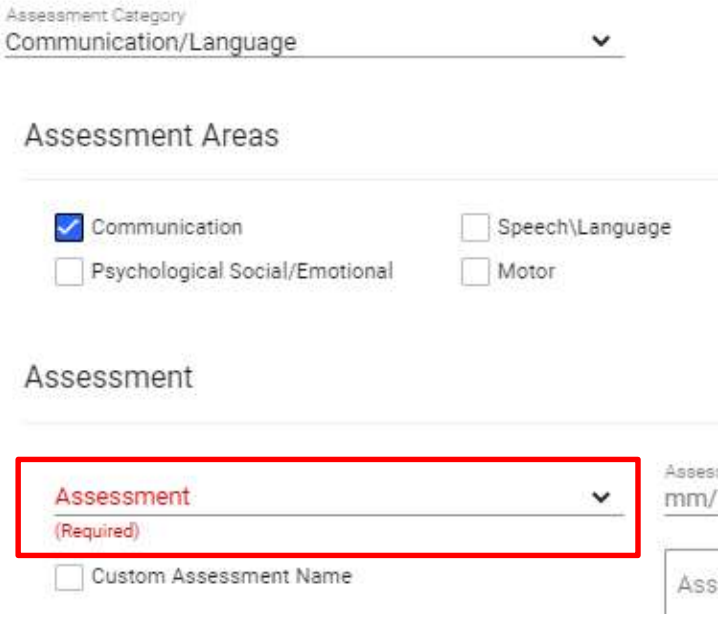
Adding an Assessment

1. Select the ‘Add Assessments’ button.

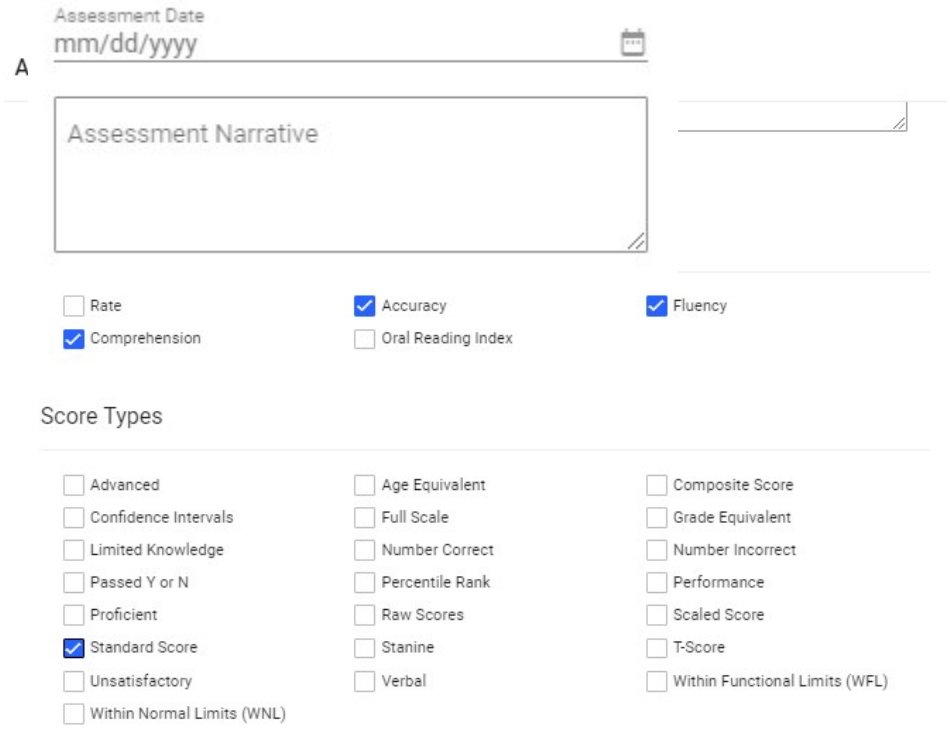
2. Select the assessment category to be addressed, and the assessment areas within the category.



3. Select the assessment from the drop list. The list of assessments is linked to the assessment area you selected previously.



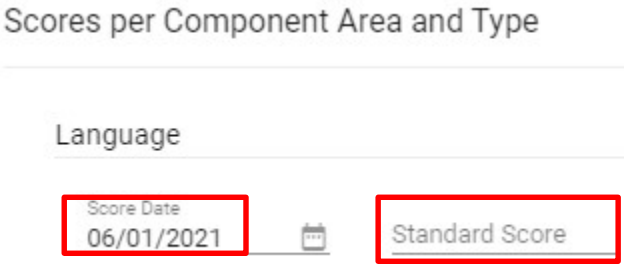
4. Enter the assessment date and add the assessment narrative.



5. Select the appropriate component areas and score types.

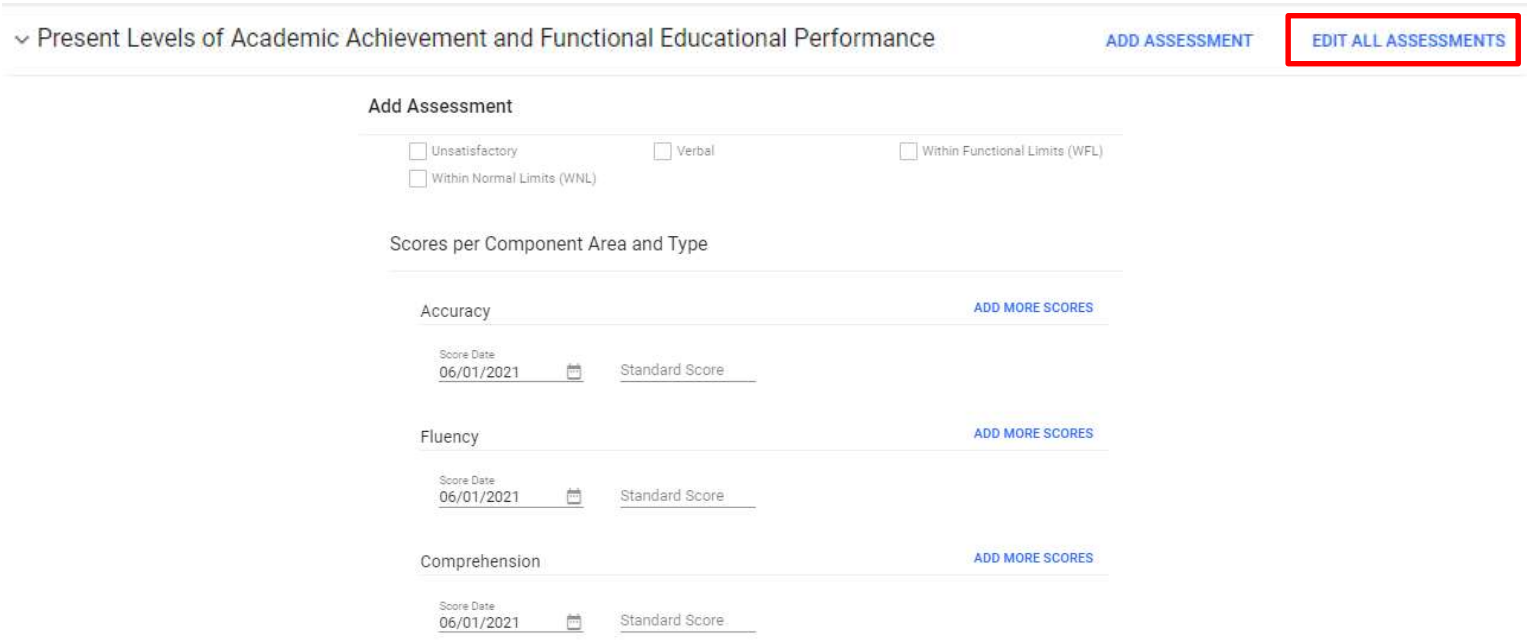
6. Click 'Save and Add Scores.'

7. The date will prefill with the assessment date. Enter scores for the assessment.



8. If the assessment has been administered more than once, select 'Add More Scores' to add an additional administration date and associated scores.

NOTE: If you would like to edit the details of all of the student's assessments at once, select the 'Edit All Assessment Details' button. This will bring up the detail fields of all assessments, which you can then edit and save all at once by clicking 'Save and Continue' once you have completed all fields.



Add Custom Assessments

1. To add a custom Assessment, return to the 'Current Assessment' page, then select the 'Add Assessments' button.
2. Select the assessment category and assessment area within the category, then complete the 'Add Custom Assessments' section

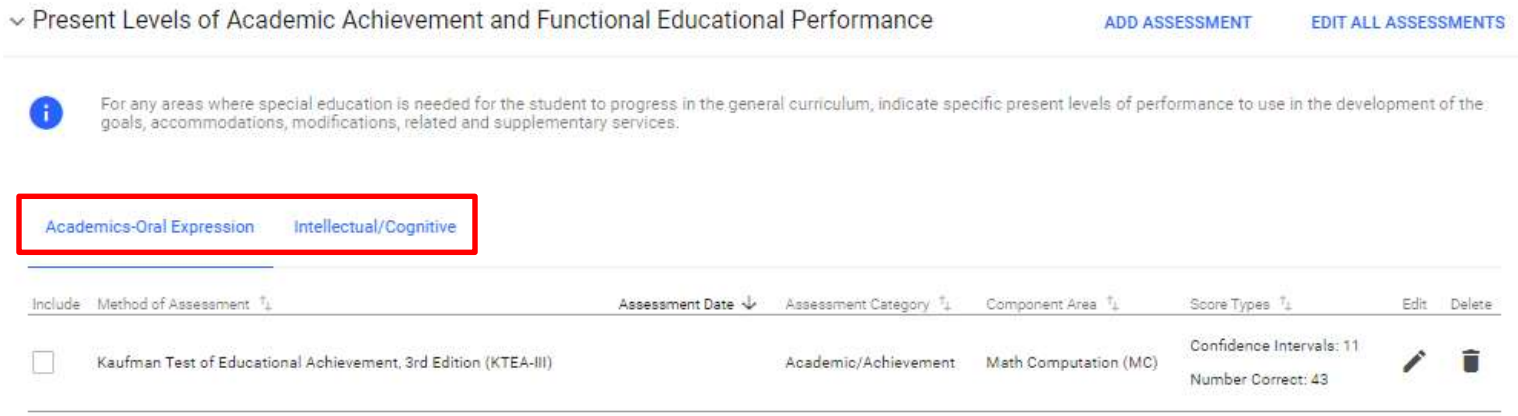
3. Select the 'Save' button.

4. 4, Select ‘Edit’ to open the Assessment panel and edit any assessment information.

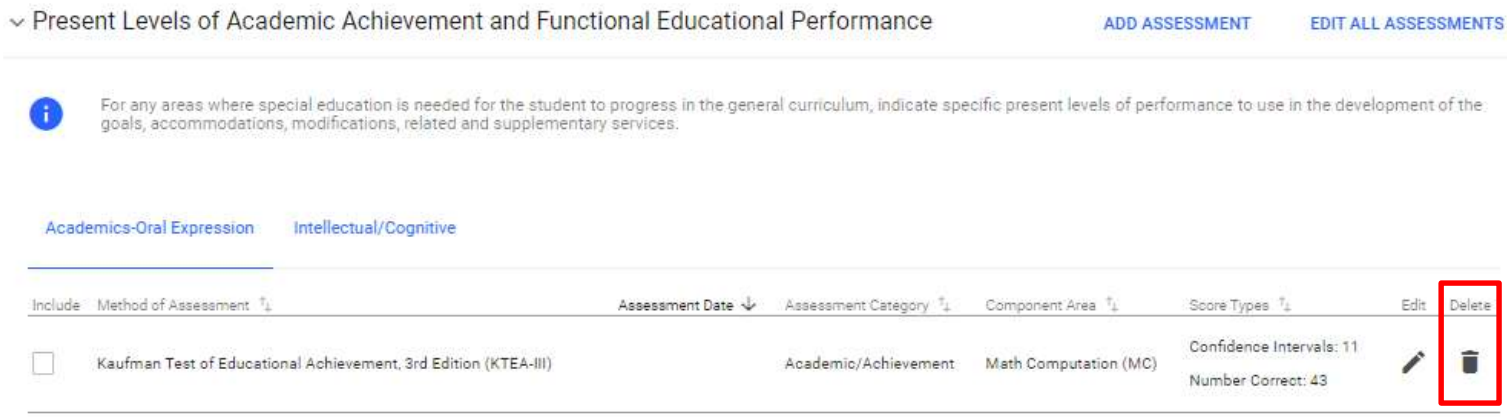
5. Note that assessments are displayed in groups, according to Assessment Area. Click on the Assessment Area to view assessments in that category.

Deleting Assessments

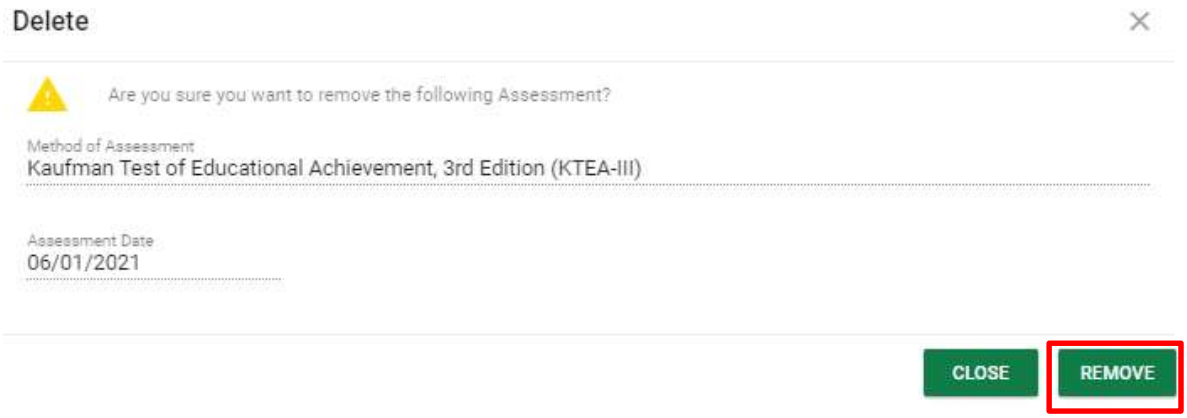
1. On the Current Assessments page, click the Assessment Area to view the student's assessments for that area.



2. Click the trash can icon to delete the assessment.

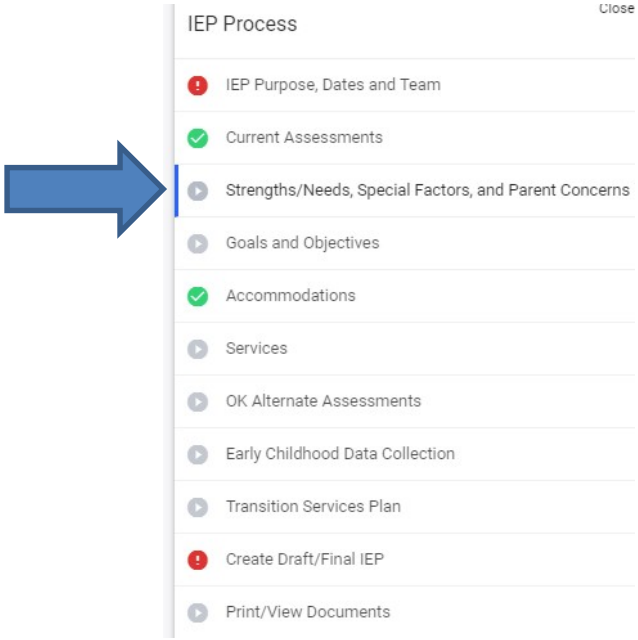


3. Click 'Remove' on the confirmation modal to delete the assessment.



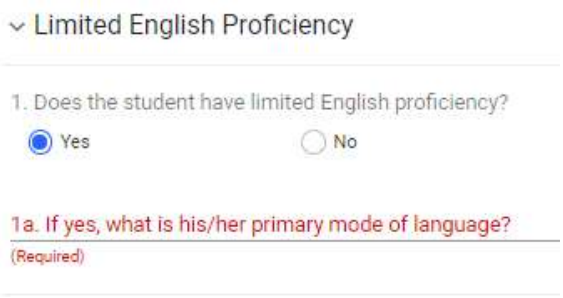
Strengths/Needs, Special Factors, and Parent Concerns

1. From the IEP Process tab, select the 'Strengths/Needs, Special Factors, and Parent Concerns' link to enter a description of student's current strengths, parent concerns and how the student's disability affects involvement in the general curriculum. Considerations of special factors for IEP development must also be addressed. This page may also be accessed by clicking the green 'Save and Continue' button on the Current Assessments page, or by selecting the page from the slider bar on the right.



All text fields on the Narratives page must have an entry. There is a 'Save' button after each section. Select any of the 'Save' buttons to save the entire page.

2. Select 'Yes' or 'No' from the radio buttons for 'Consideration of Special Factors for IEP Development,'. If a user picks 'Yes' in the first question, they must answer the sub-question(s).



3. When completed, select the 'Save and Continue' button to check for errors and move to the Goals and Objectives page.

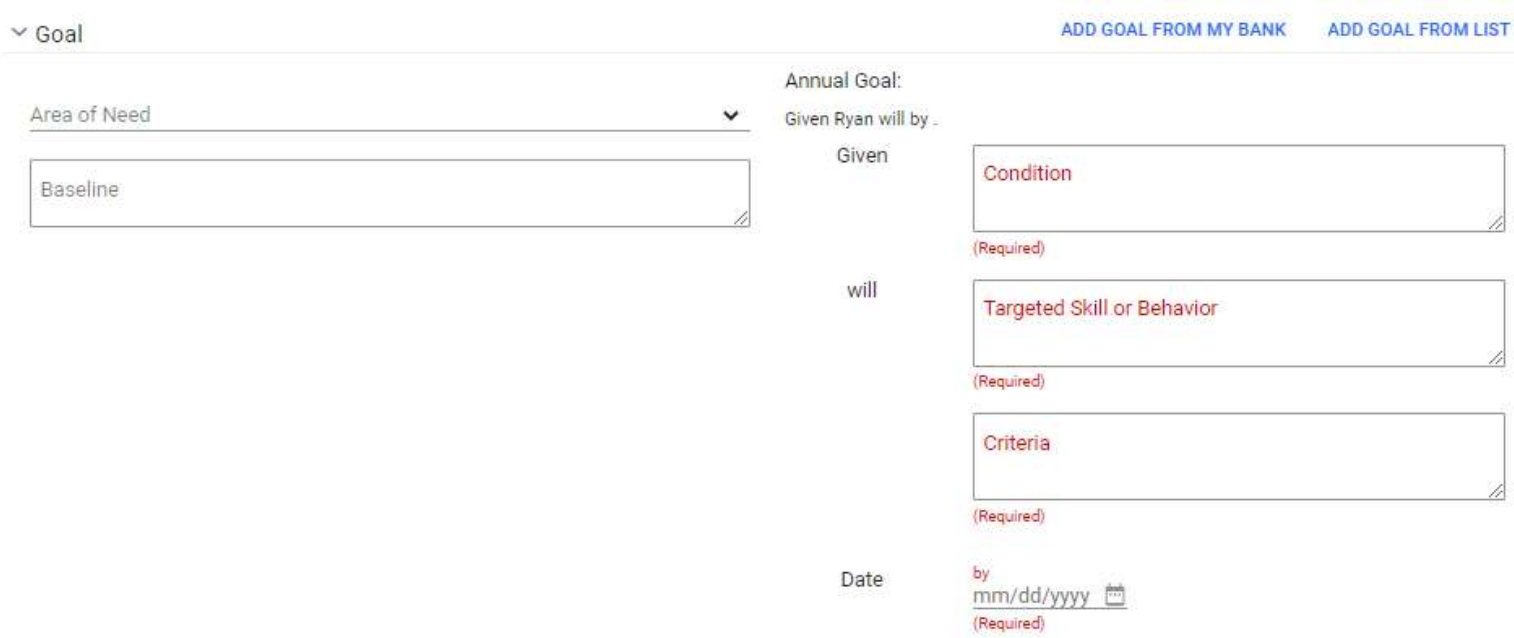
Goals and Objectives

Adding Goals

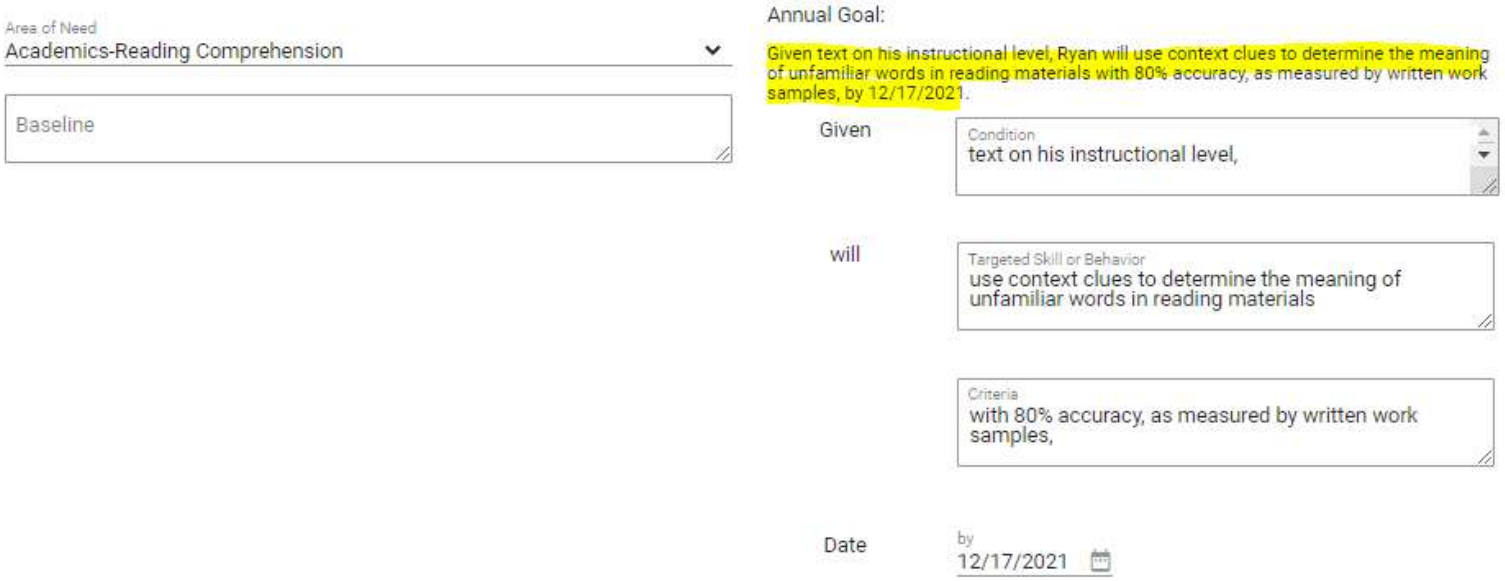
1. From the IEP Process landing page, select the 'Goals and Objectives' tile. Goals and Objective page can also be accessed by clicking the green Save and Continue button from the Strengths/Needs page, or by using the slider bar on the right side of the screen.

2. Select 'Add Goals and Objectives.'

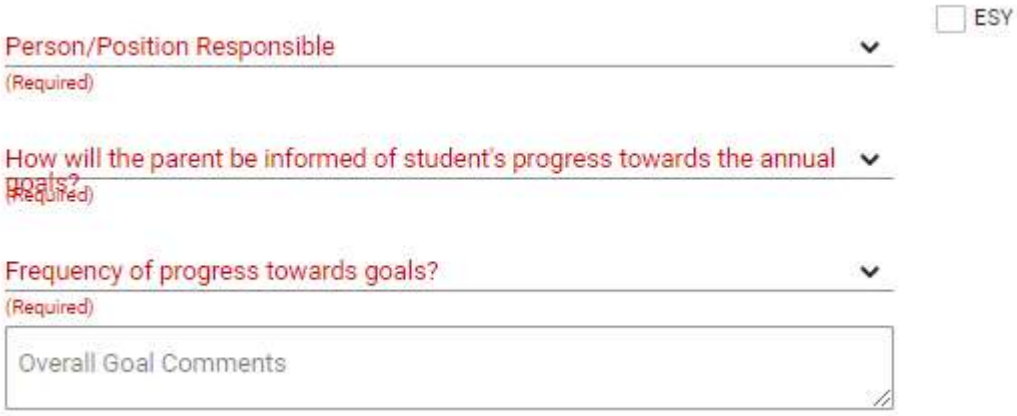
3. You may write a custom goal, add a goal from your bank, or add a goal from a list. To add a custom goal, enter the Area of Need, and the information in the 'Condition,' 'Targeted Skill or Behavior,' 'Criteria,' and date fields. As you enter this information, the data will be concatenated to build the goal. Baseline information may be documented in the Baseline text field, but is not required.



Note the Annual Goal that has been built using the individual data elements entered here

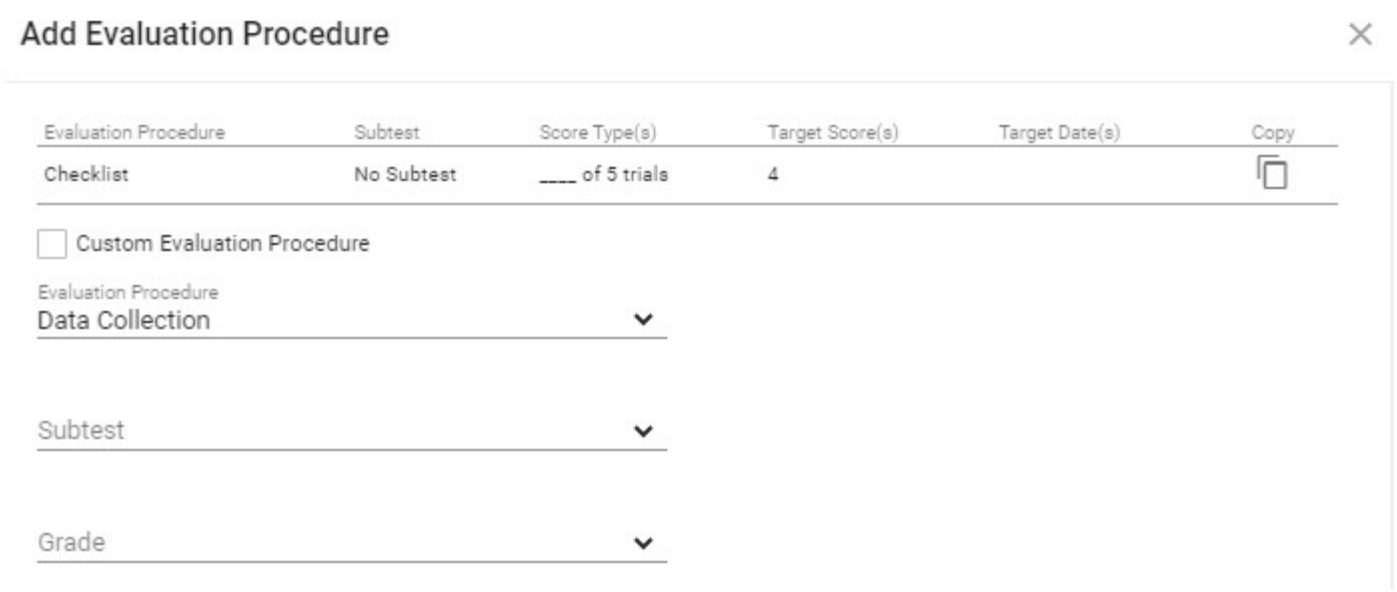


4. Enter the person responsible, how parents will be informed of progress, and the frequency with which progress will be reported, and an overall goal comment if needed. If this is an ESY goal, check the ESY check box. Click 'Save.'

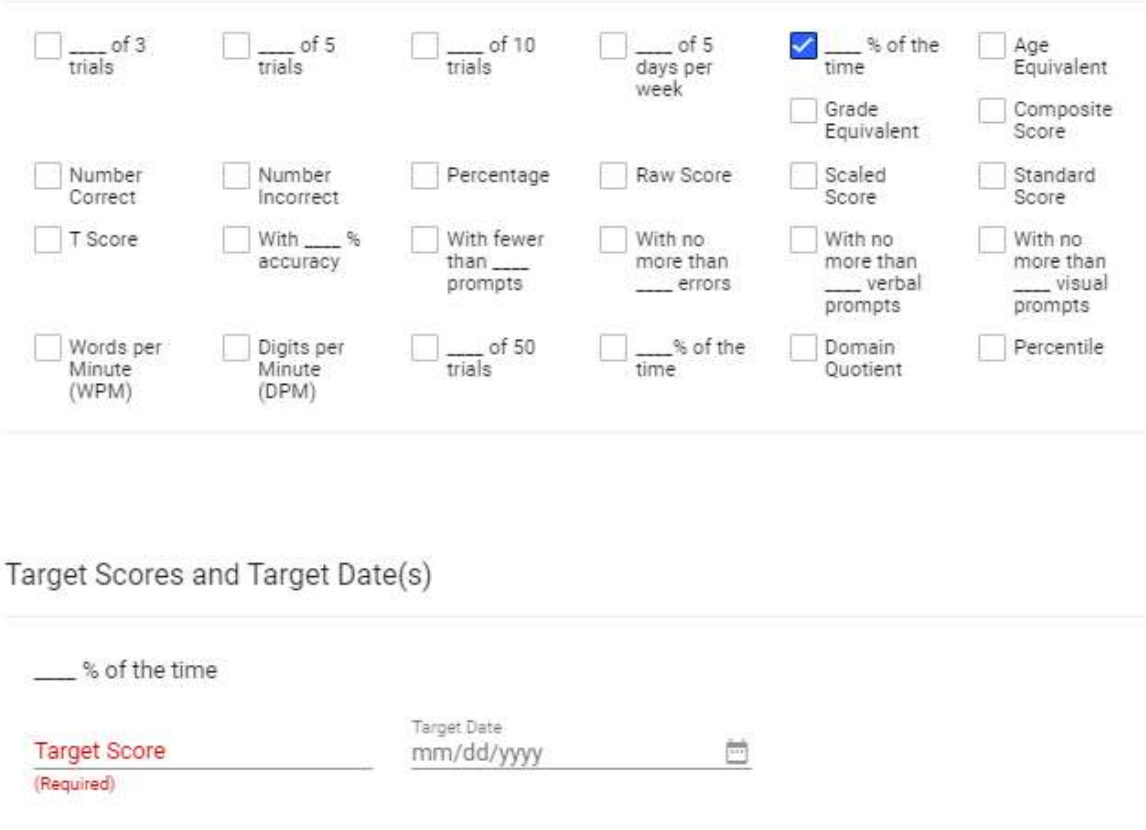


5. Saving the goal will prompt the Evaluation Procedure section to open. Click 'Add Evaluation Procedure' to enter the method to be used to measure progress toward the goal.

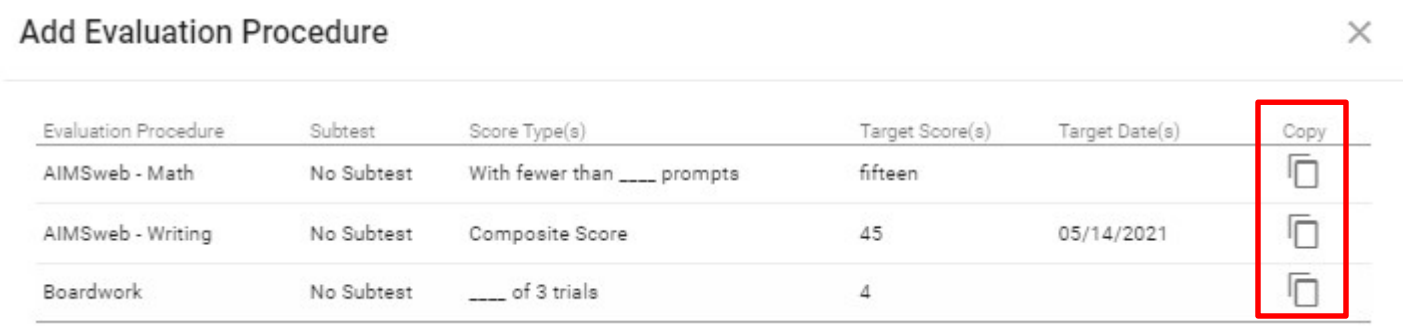
6. Select the Evaluation Procedure, Subtest (if applicable), and grade. You may also add a custom evaluation procedure.



7. Next select the score type and enter the Target Score. Enter a Target Date if it is less than the end date of the IEP. Click Save.



8. Frequently used Evaluation Procedures will be listed at the top of the modal window. Click 'Copy' to apply an evaluation procedure to the goal.

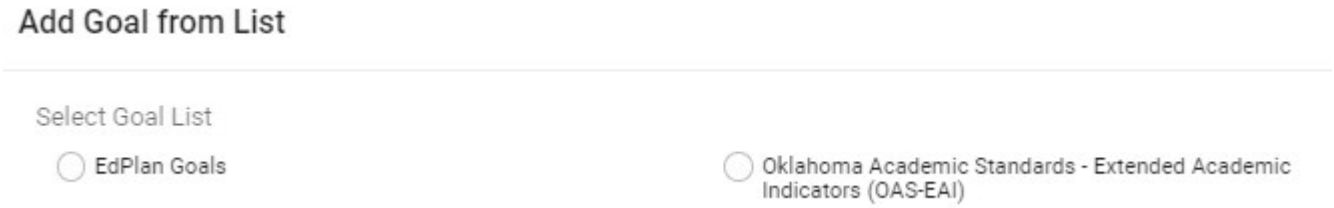


Adding Goals from a List

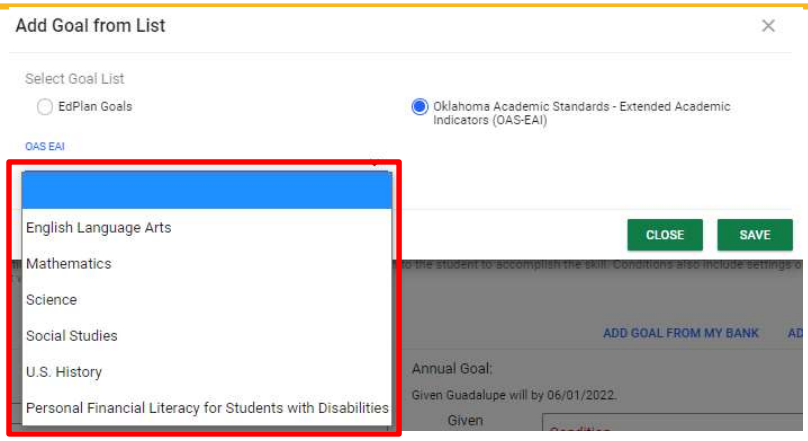
1. Select 'Add Goals and Objectives.'

2. Select 'Add Goal from List.'

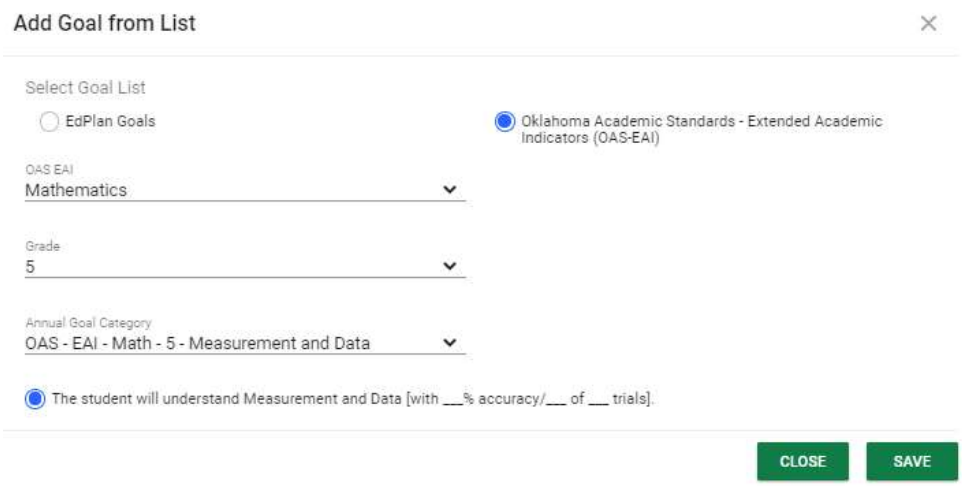
3. Select the appropriate goal list.



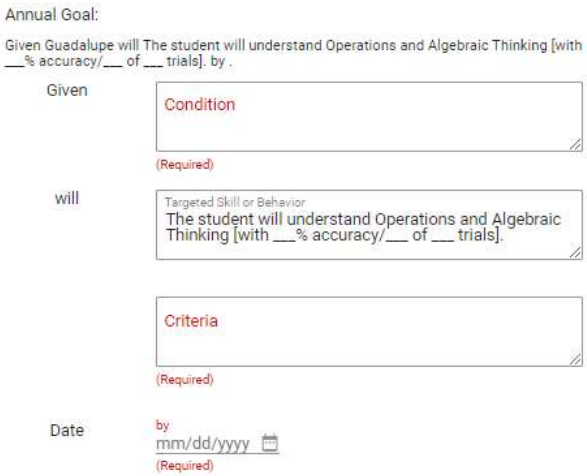
4. Select the goal area.

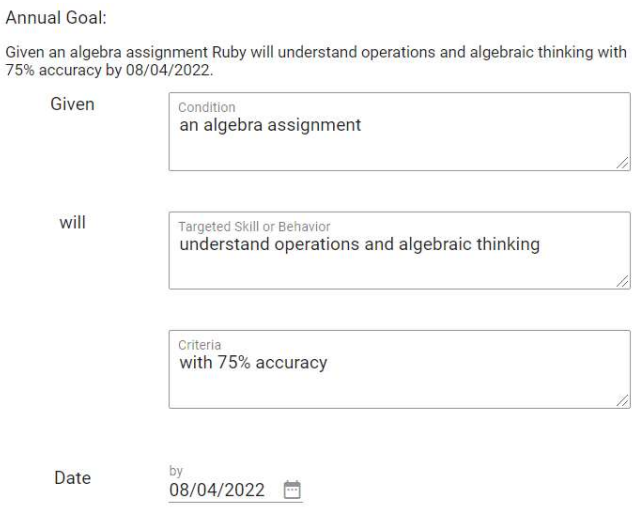


5. Select the grade, Annual Goal Category, and Annual Goal, and Save.



6. The selected goal will populate in the 'Targeted Skill or Behavior' text field. You will need to separate the condition and criteria and put them in the appropriate fields. See example below.

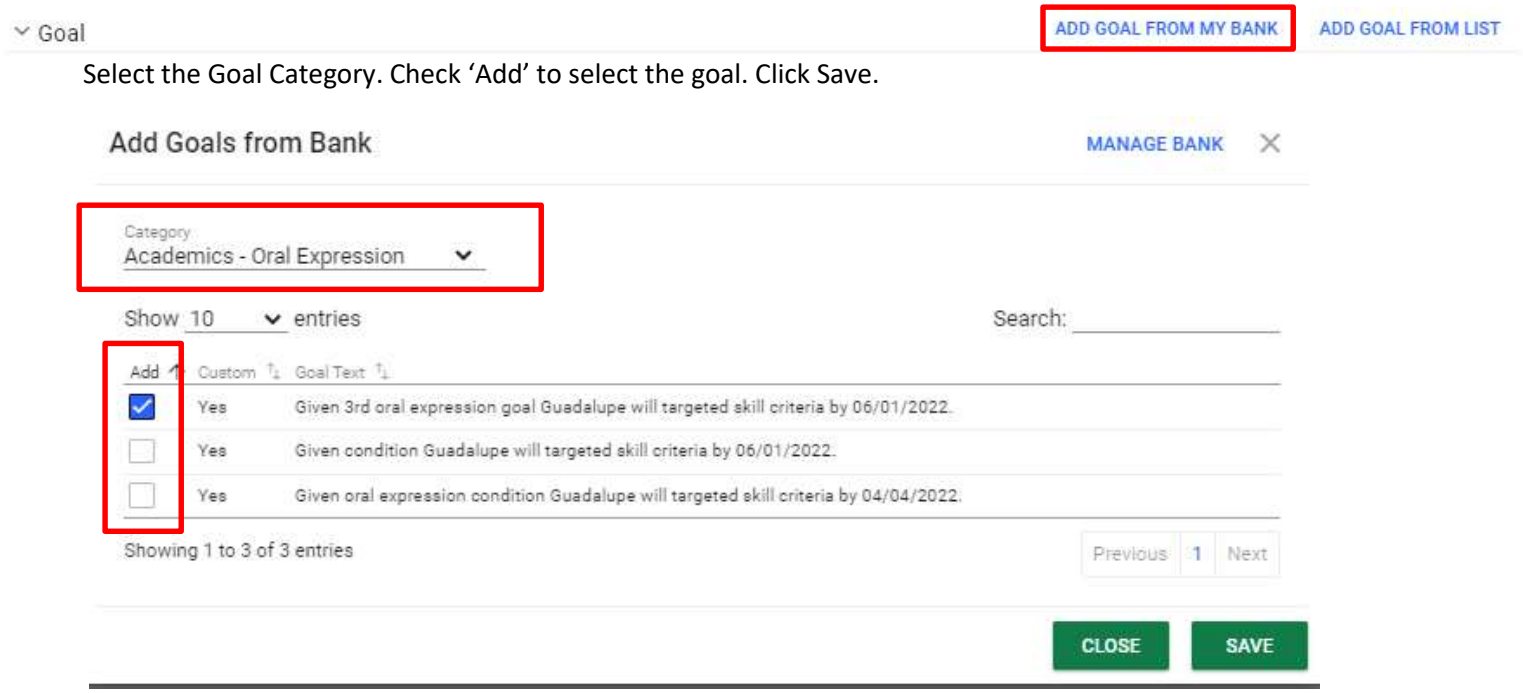




7. Complete the remaining goal fields as outlined previously.

Adding Goals from a Bank

1. Select 'Add Goal from My Bank.'



Select the Goal Category. Check 'Add' to select the goal. Click Save.

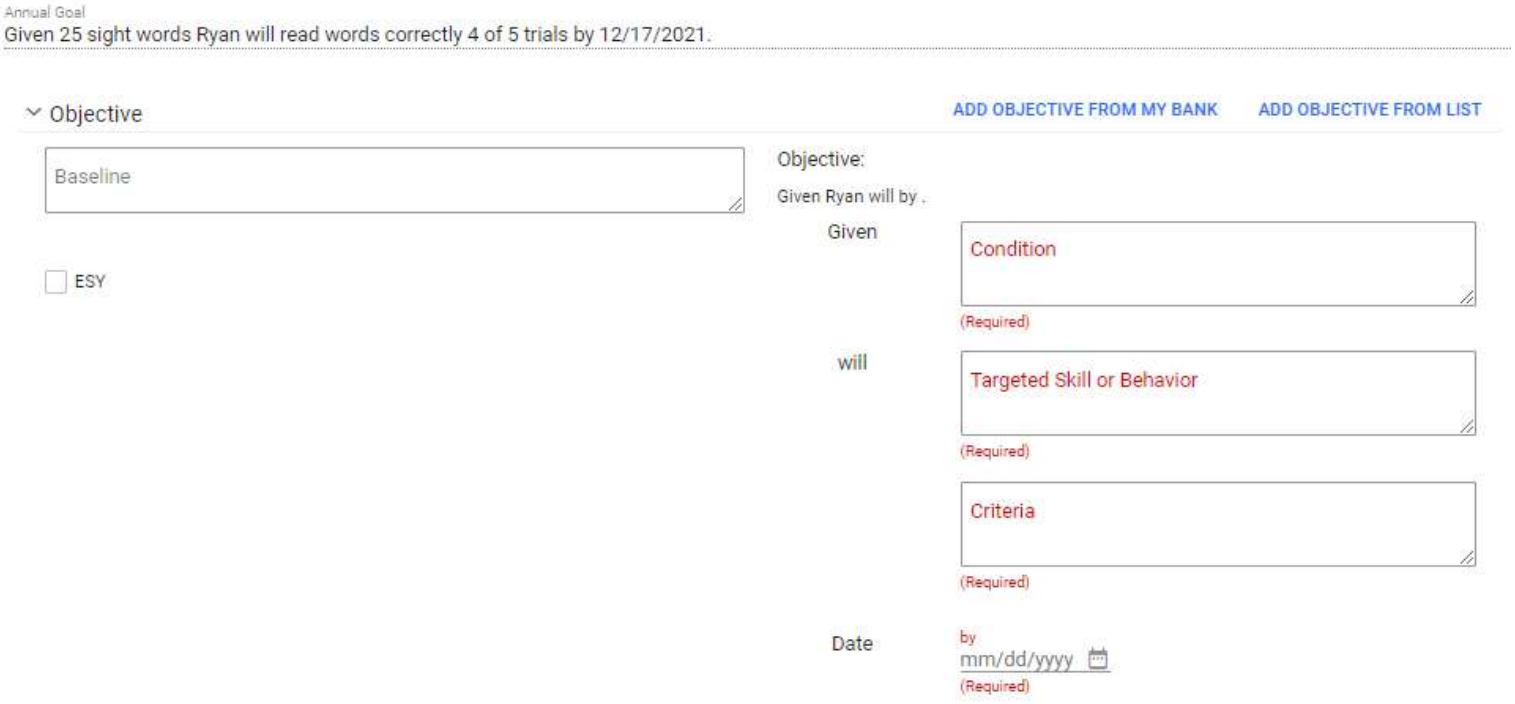
2. Complete the remainder of the required fields, and Save.
3. Add Evaluation Procedure(s) as outlined previously.

Adding Objectives

Short term objectives or benchmarks are only required in the IEPs of children who take Alternate Assessments aligned to Alternate Achievement standards. Should an IEP team wish to add short-term objectives for students outside of the Alternate Assessment population, this option is available in the system.

1. Select the 'Add Objective' button.

2. Enter objectives in the same way goals were entered. Evaluation Procedures, Score Types, and Target Scores will be added after the objective is saved.



3. Select the 'Save and Continue' button to return to the Goals page.

Banking Goals and Objectives

This feature allows for creation of a Goals Bank for use when adding goals to the Goals and Objectives page. The banking option allows users to import the goals used on a regular basis to a Goal Bank. Users can develop their banks from the goal lists, by adding custom goals/objectives or by importing existing goals from students on their caseload. The goal bank management screen can be accessed on the 'My Info' tab or directly on the Goals page.

ADDING ANNUAL GOALS TO BANK

1. Select 'Add Goals and Objectives.'

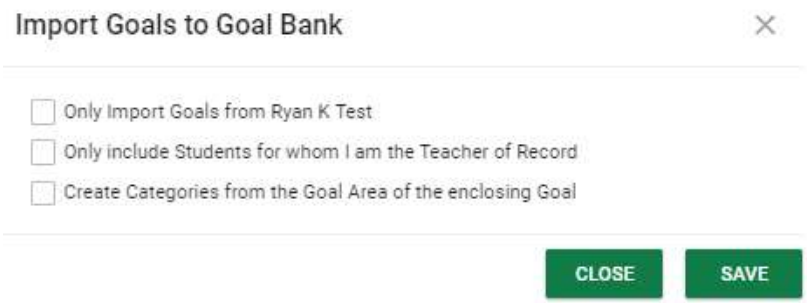
2. Select 'Add Goal from My Bank.'

3. Select 'Manage Bank.'

4. You may add custom goals to the goal bank, import goals from your caseload, or add goals to your bank from a list.

5. To import goals from your caseload, select one or more of the following by checking the box next to it:

- Only import goals from ABC Student
- Only include students for whom I am Teacher of Record
- Create Categories from the Goal Area of the Goal

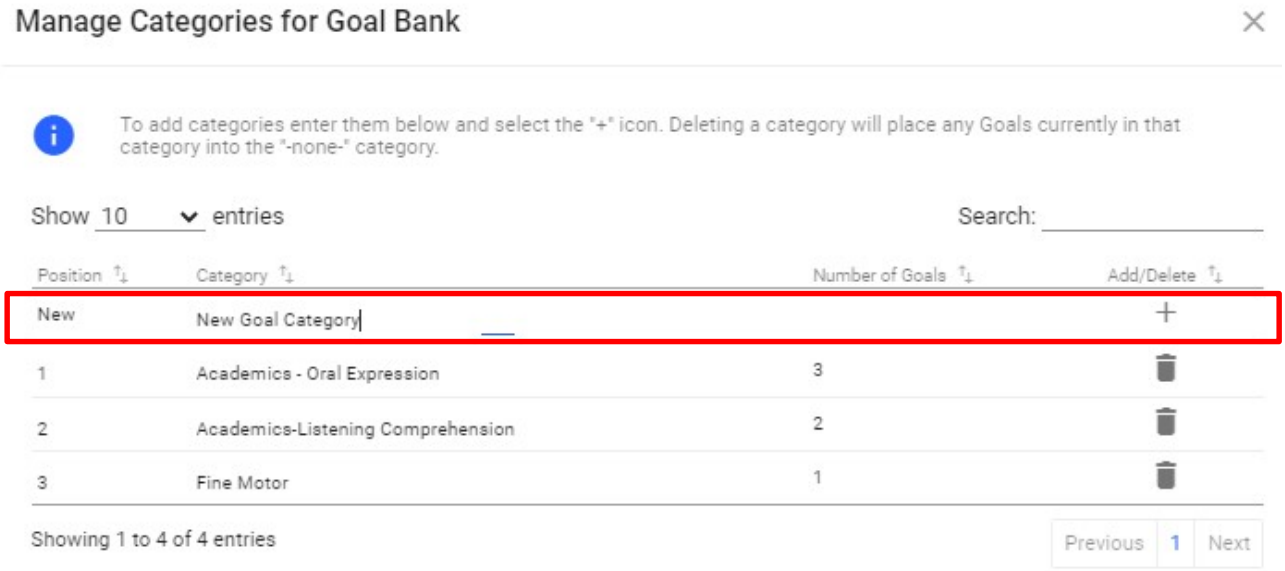


6. Click 'Save' to save the goals to your goal bank.

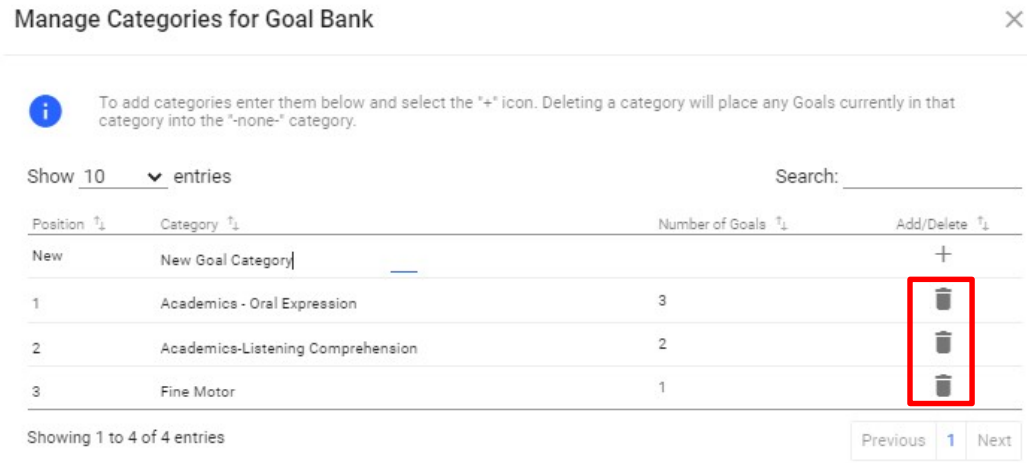
Managing Goal Bank Categories

1. Select 'Manage Categories.'

7. Enter a new category by typing in the name of the category, then click the +.

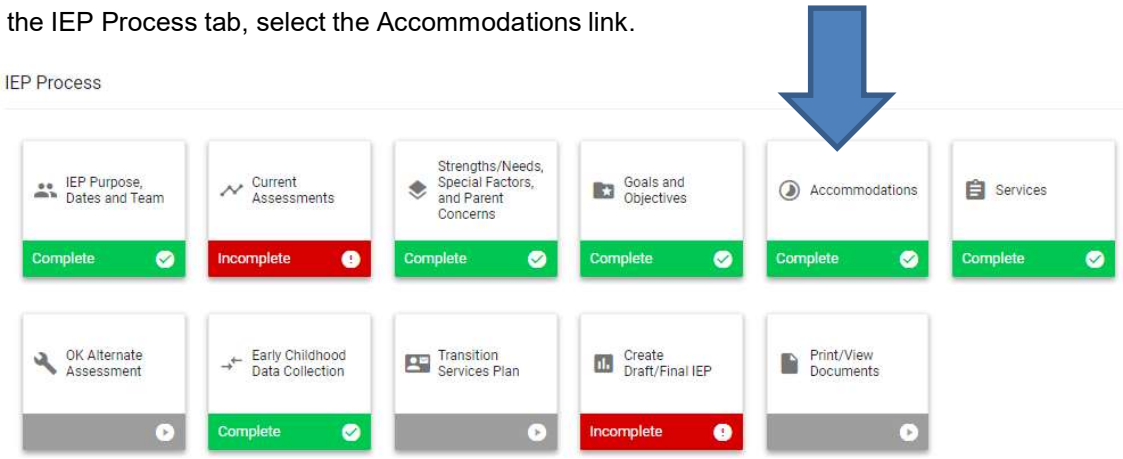


8. To delete a category, click the trash can icon.

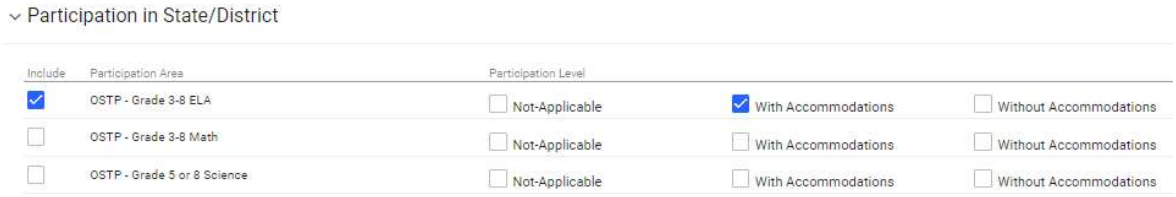


Accommodations

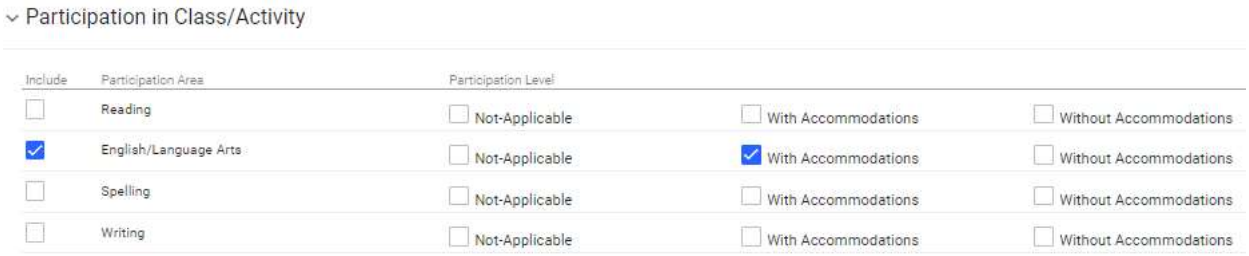
1. From the IEP Process tab, select the Accommodations link.



2. Select the Participation Area(s) and Participation level(s) for State/District assessments.

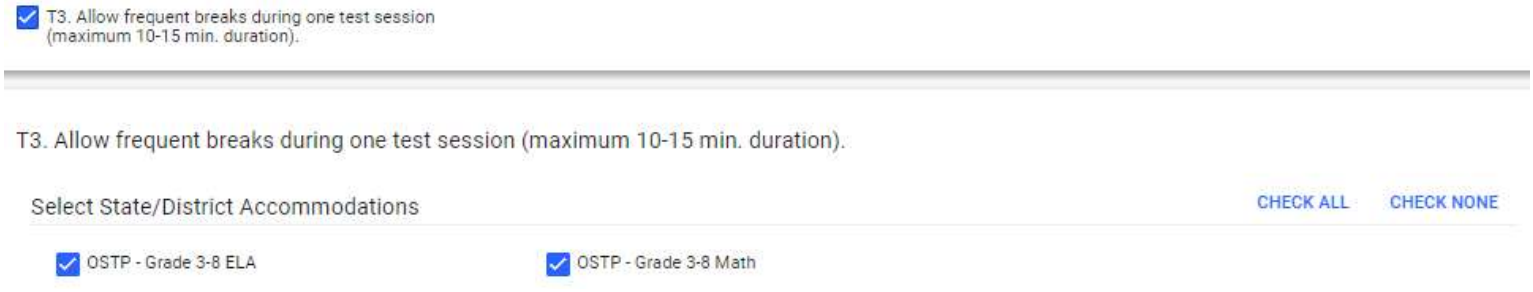


3. Select the Participation Area(s) and Participation level(s) for classes/activities.



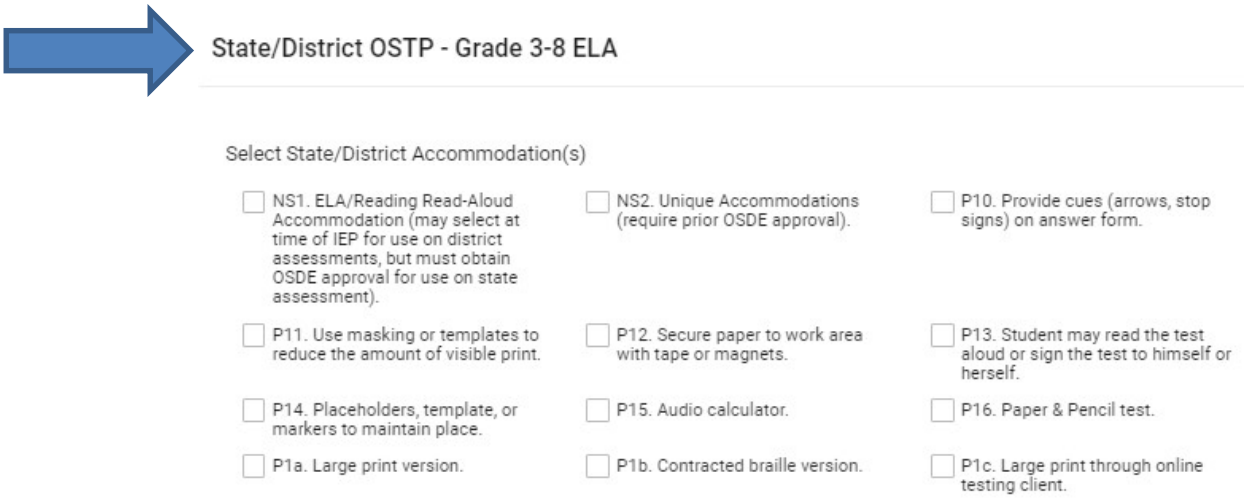
4. Accommodations may be added in two ways. Selecting the 'Add Accommodations' that is associated with State/District Assessments allows you to select and add multiple state/district accommodations to multiple assessment areas.

5. As you select the accommodation, it is added to all state/district and class/activity areas. You may unselect a state/district and/or class activity area if the specific accommodation is not appropriate for that area.

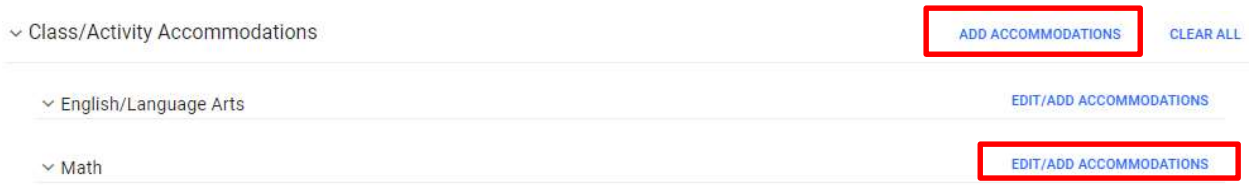


6. Accommodations may also be added for each assessment area individually. To add accommodations to only one assessment area, select 'Edit/Add Accommodations.'

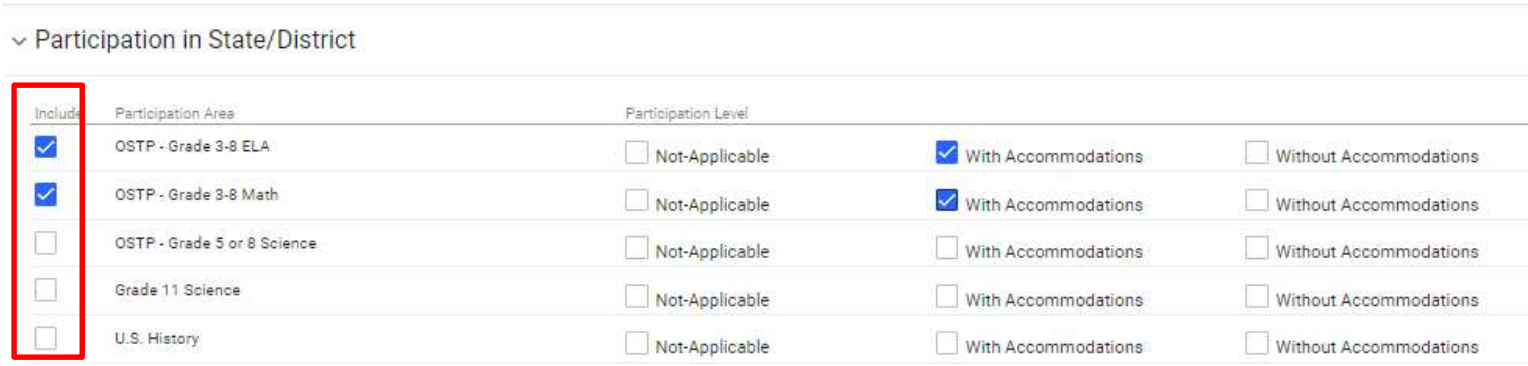
The selected accommodations will only be applied to the specific assessment area.



7. The process to add Class/Activity accommodations is much the same, select 'Add Accommodations' to select and apply class/activity accommodations to Class/Activity areas, or select 'Edit/Add Accommodations' to add accommodations to one specific Class/Activity area.



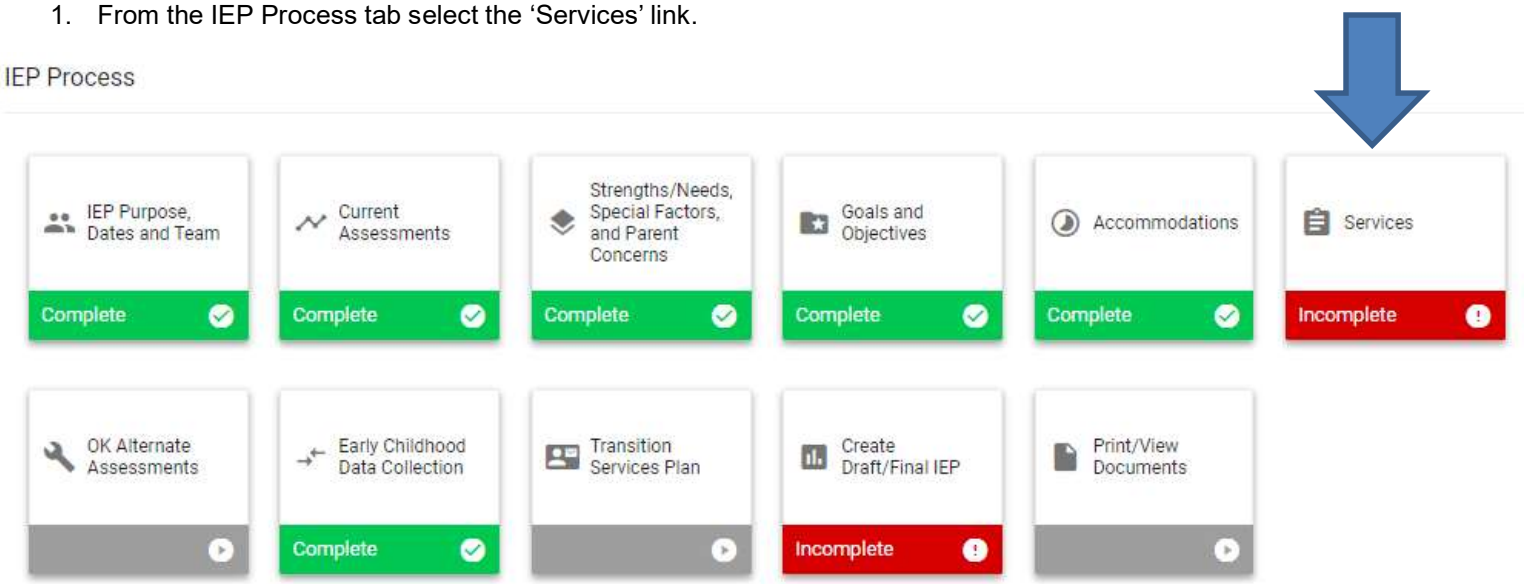
8. Check the 'Include' checkbox to include the accommodation on the printed IEP document.



Services

All Special Education Services, Related Services and Supplemental Aids are added on the page titled 'Services.'

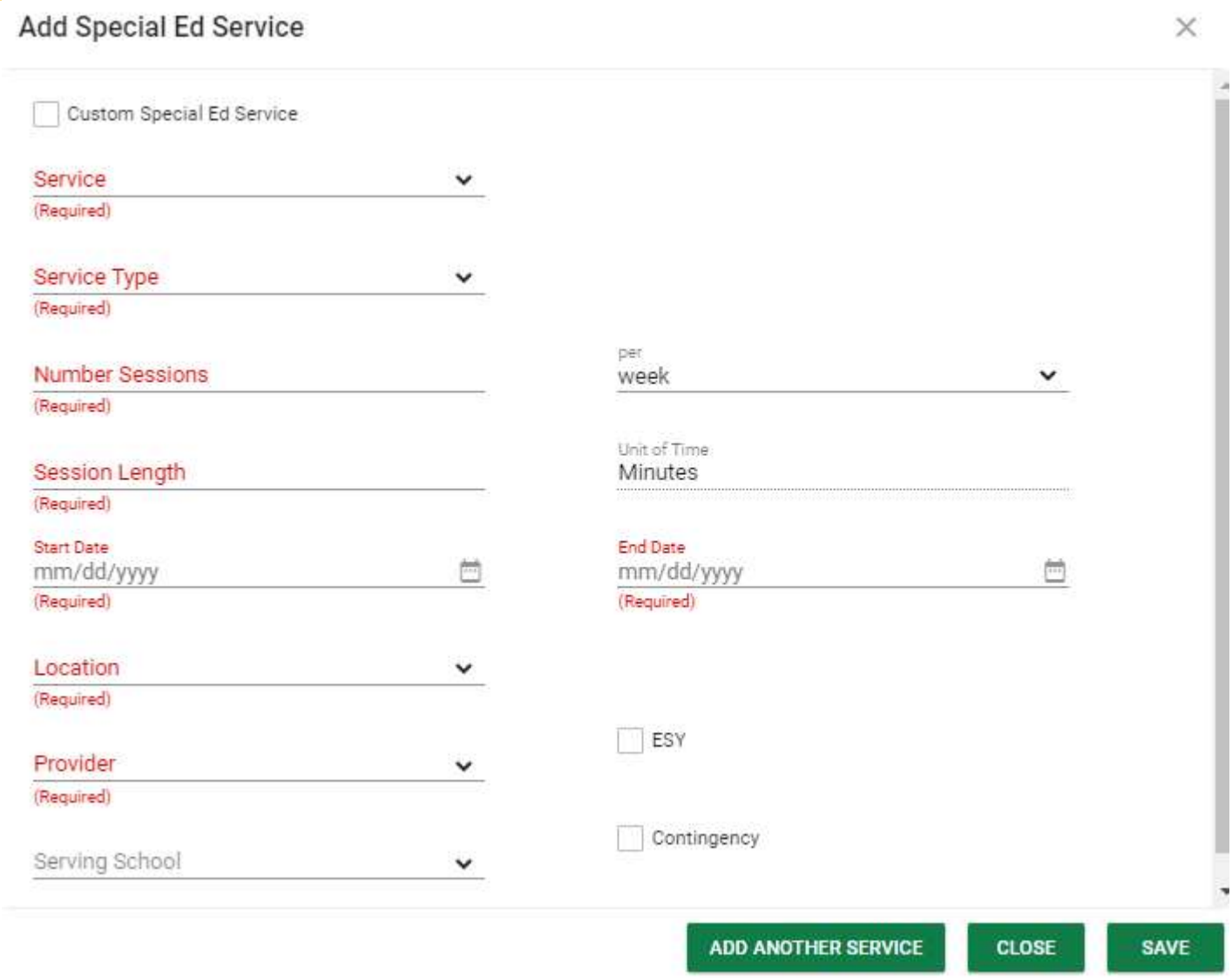
1. From the IEP Process tab select the 'Services' link.



Special Education Services

3. Select 'Add Special Ed Service.'

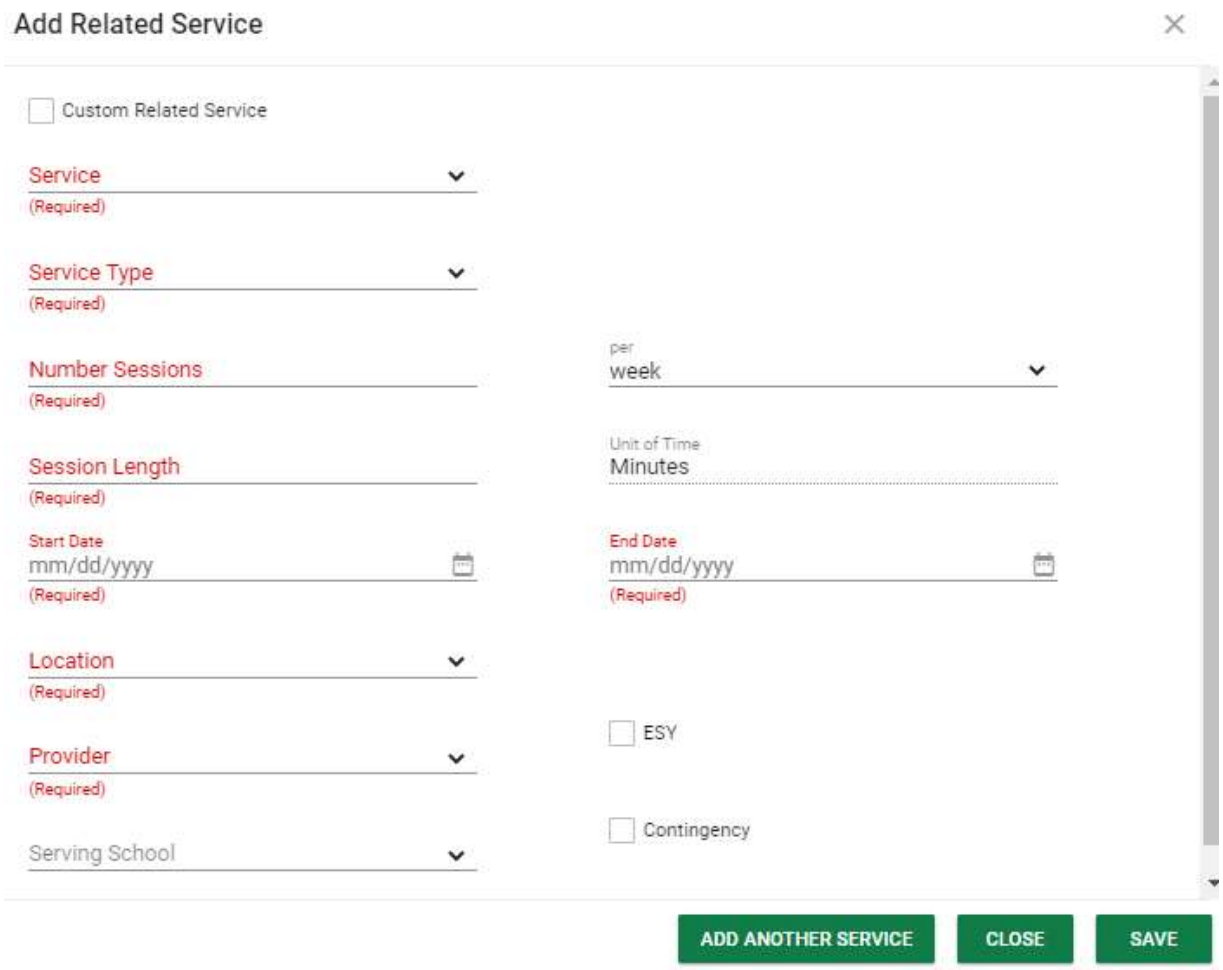
2. In the modal window, select the service (or click 'Custom Special Ed Service' to add a custom service, service type, number of sessions, session length, start and end dates (start/end dates will prefill with IEP start/end dates, but can be edited), location, and provider.
3. If the services are provided at a school different from the attending school, select a Serving School. Only select a Serving School if the services are provided at a different school.
4. Save, or click 'Add Another Service' to continue adding special education services.
5. Select ESY or Contingency if appropriate.


Add Special Ed Service
Custom Special Ed Service
Service
(Required)
Service Type
(Required)
Number Sessions
(Required)
per
week
Session Length
(Required)
Unit of Time
Minutes
Start Date
mm/dd/yyyy
(Required)
End Date
mm/dd/yyyy
(Required)
Location
(Required)
ESY
Provider
(Required)
Contingency
Serving School
ADD ANOTHER SERVICE
CLOSE
SAVE

Related Services

1. Select the 'Add Related Services' button.

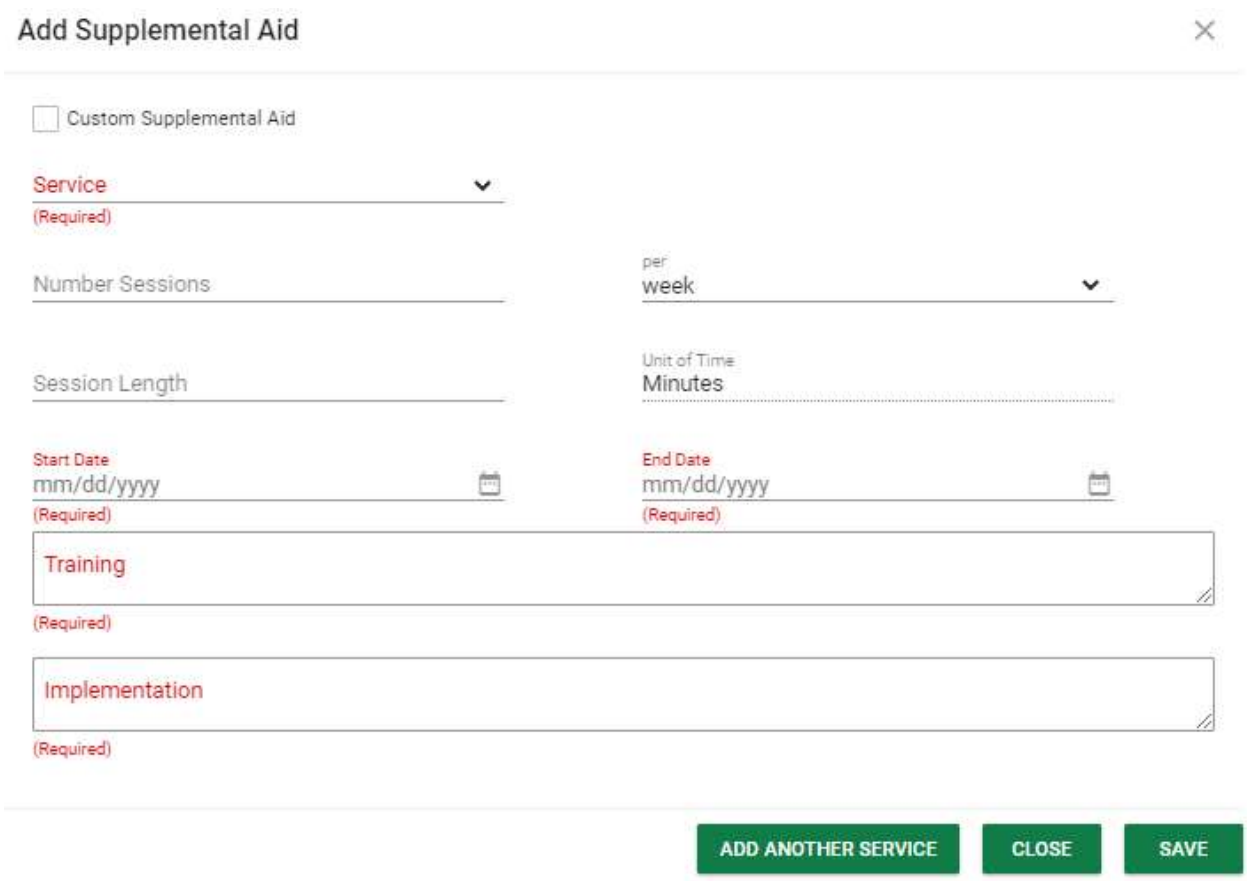
2. Select the appropriate 'Related Service' and 'Service Type' from the dropdown menu, or add a custom service. Choose the 'Number of Sessions' per Year, Week, Month or Day and 'Session Length' in minutes.
3. Enter a start date and end date for the related service.
4. Check ESY, as needed.
5. Select the Provider and Service Location. Provider and Location are required to create a Final IEP.
6. If the service is provided at a school different from the attending school, select a Serving School.
7. Select the 'Save' button to return to the previous page.



Supplemental Aids

1. On the Services page, select the 'Add Supplemental Aids' button.

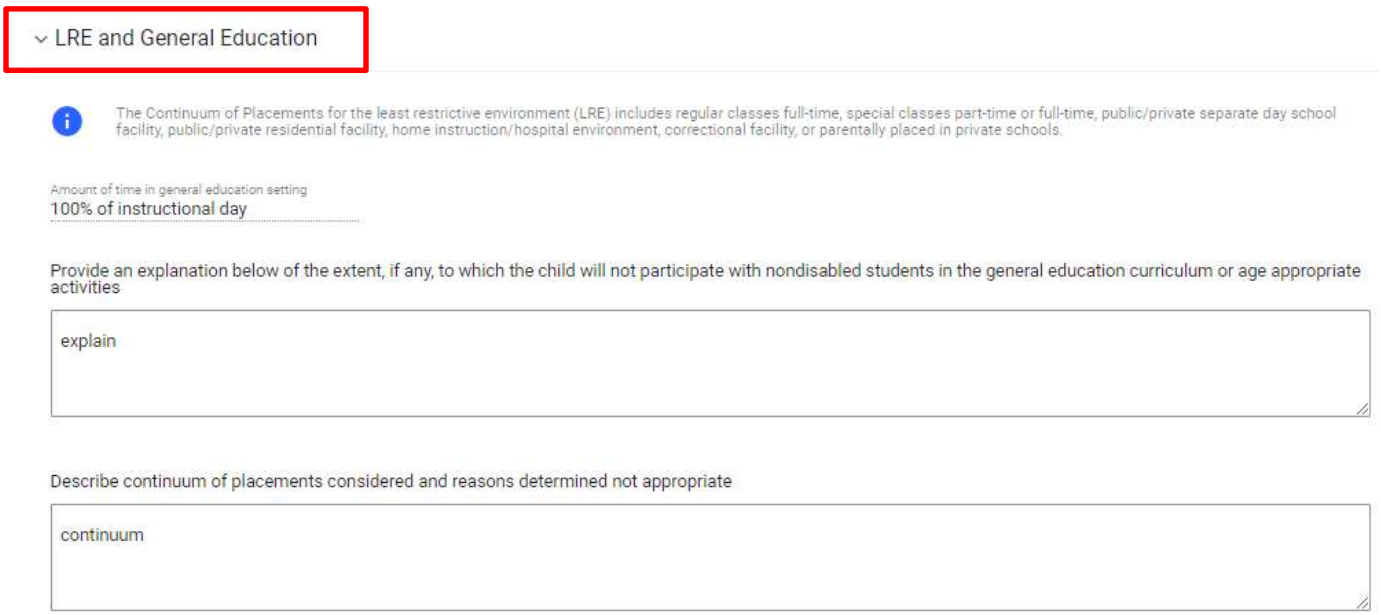
2. Select the appropriate aids and services from the dropdown menu or enter custom information.
3. Choose the number of sessions per year, week, month or day. Choose the session length in minutes.
4. Enter the start date and end date.
5. Select the 'Save' button to return to the previous page.



LRE Details

Click the arrow to expand the LRE and General Education section and enter information concerning 'Least Restrictive Environment' (LRE).

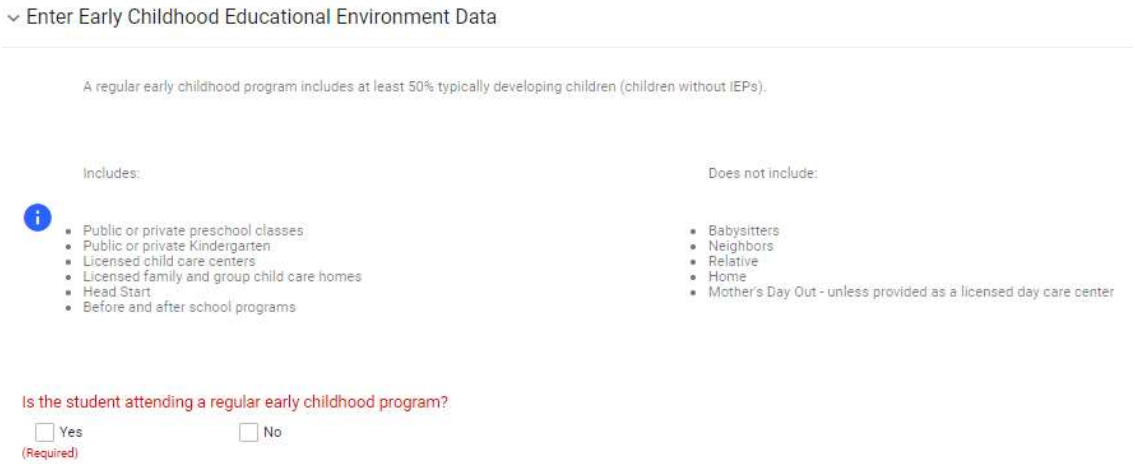
Enter the appropriate response to each question in the corresponding fields. If 'No' is selected, answer the corresponding question(s).



Early Childhood Educational Environment

The process of determining the most accurate educational environment must be completed at each IEP meeting for children ages 3 and 4 and in grade PK. The steps for providing an accurate educational environment within OK EDPlan™ are shown below.

1. Answer the questions to determine the child's early childhood educational environment.



2. Once you have completed the page you will need to 'Save and Confirm EC Placement' to confirm the placement that you just entered.

NOTE: To view previous placement you must select the button 'View Previous Placement.'

ESY Details

1. Scroll down to Extended School Year section on the Services page and complete the information for 'Extended School Year' (ESY).

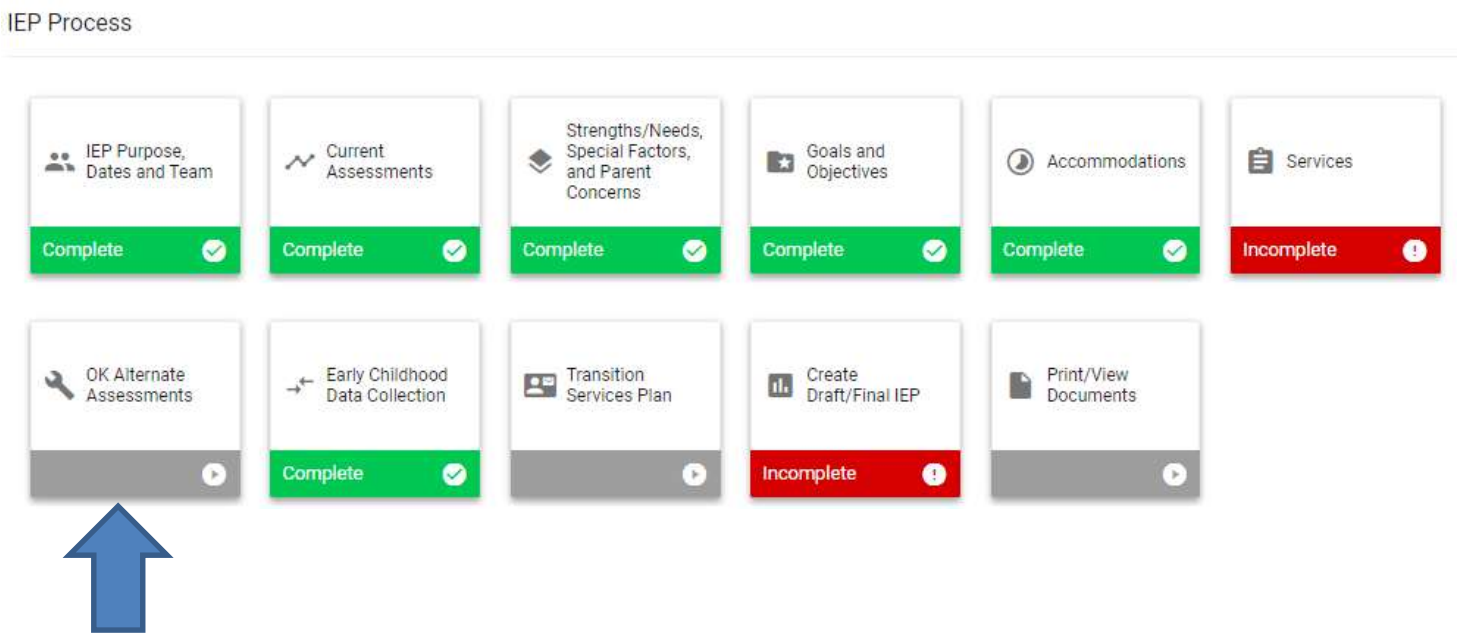
2. Select the 'Save and Continue' button to move to the next page in the IEP process.

OK Alternate Assessments

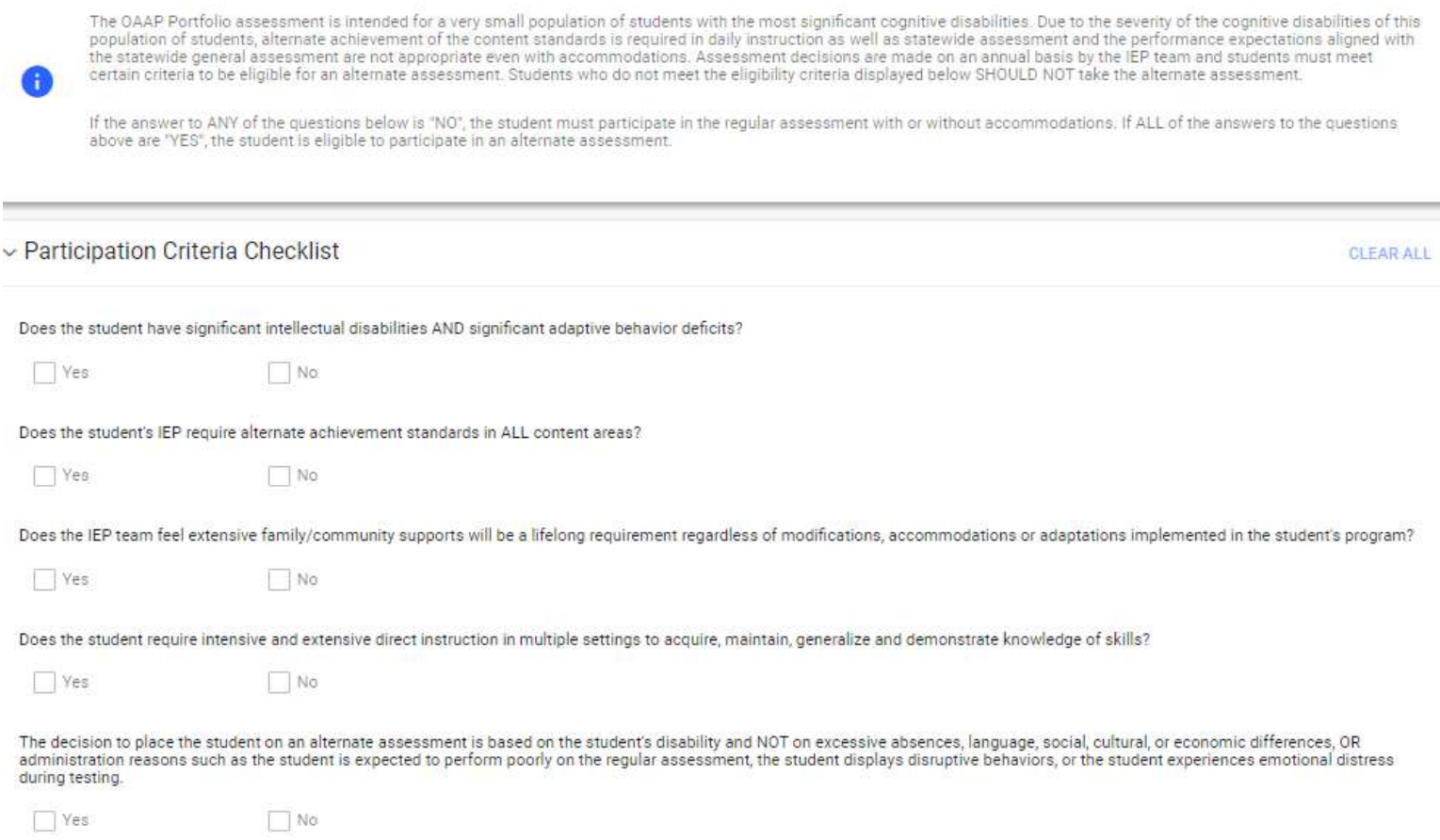
The OAAP Portfolio assessment is intended for a very small population of students with the most significant cognitive disabilities. Due to the severity of the cognitive disabilities of this population of students, alternate achievement of the content standards is required in daily instruction as well as statewide assessment and the performance expectations aligned with the statewide general assessment are not appropriate even with accommodations. Assessment decisions are made on an annual basis by the IEP team and students must meet certain criteria to be eligible for an alternate assessment. Students who do not meet the eligibility criteria displayed below SHOULD NOT take the alternate assessment.

If the answer to **ANY** of the questions below is "NO", the student must participate in the regular assessment with or without accommodations. If **ALL** of the answers to the questions above are "YES", the student is eligible to participate in an alternate assessment.

1. From the IEP Process tab select the 'OK Alternate Assessments' link.



2. Select ‘Yes’ or ‘No’ in the Participation Criteria Checklist.

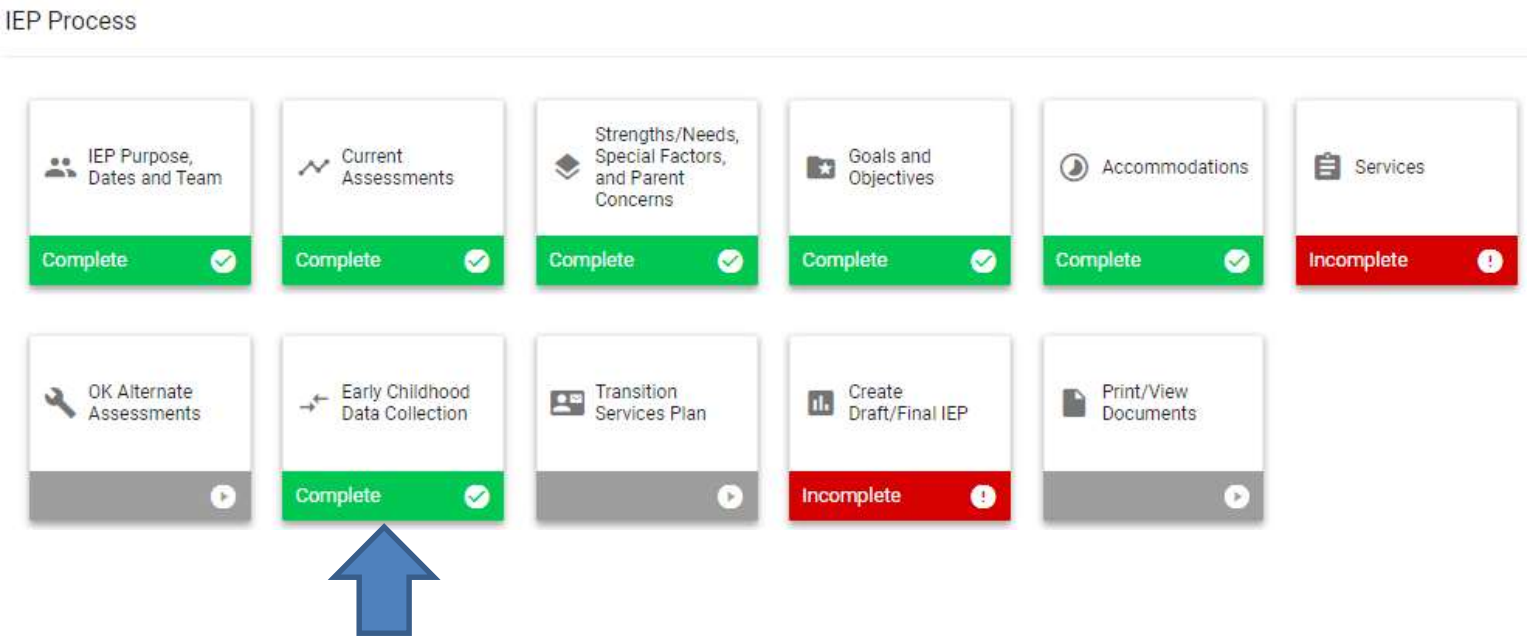


3. Select the ‘Save and Continue’ button to check for errors and return to the IEP process page.

NOTE: If you selected ‘No’ the child will not participate in the alternative assessments on the ‘Current Assessments’ page, this page will be read only.

Early Childhood Data Collection

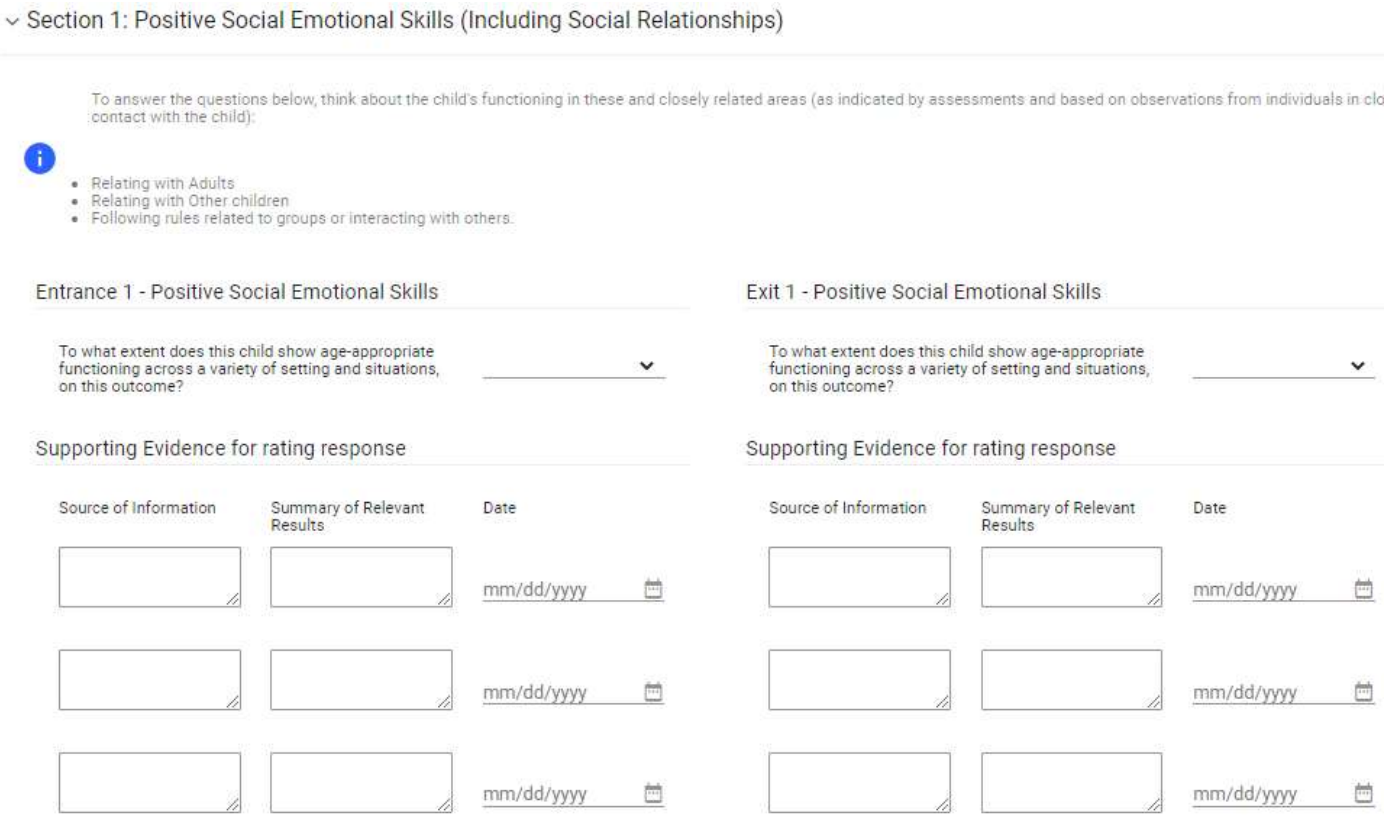
1. From the IEP Process tab select the 'Early Childhood Data Collection' link.



Early Childhood Outcomes Summary

The left side of the page is entrance data and the right side of the page is exit data.

2. Enter the date for either entry or exit from the Early Childhood Program and associated ratings. Remember there is only one Entrance into the Early Childhood Program and one exit date. This is not a direct correlation with exiting the school district or entering the school district.
3. Enter data in the sections below Source of Information, Summary of Relevant Results, and Date.

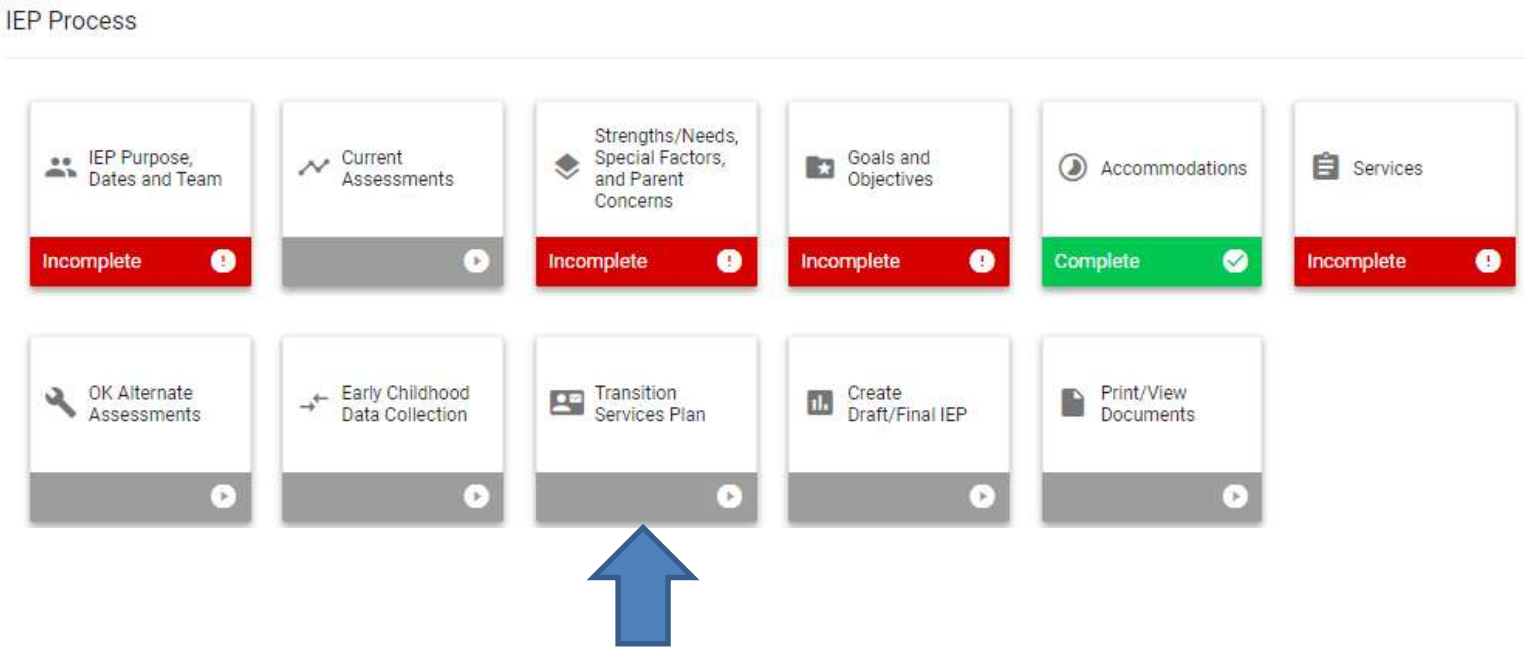


4. Select the 'Save and Continue' button to check for errors and return to the IEP process page.

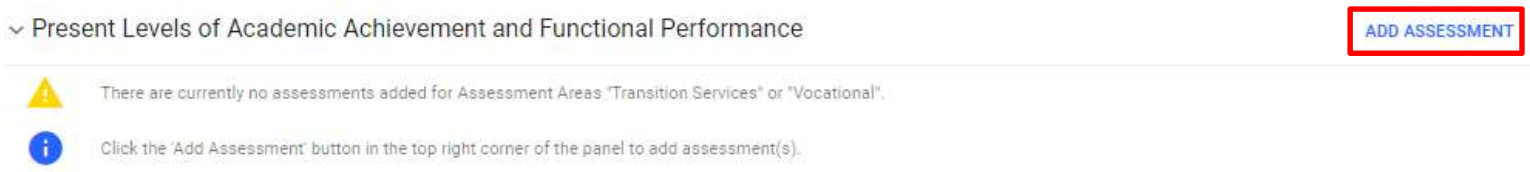
Transition Services Plan

The IEP must include secondary transition services that are in effect no later than the beginning of the student's ninth grade year or upon turning 16 years of age, whichever comes first, or younger, if determined by the IEP team, and updated annually.

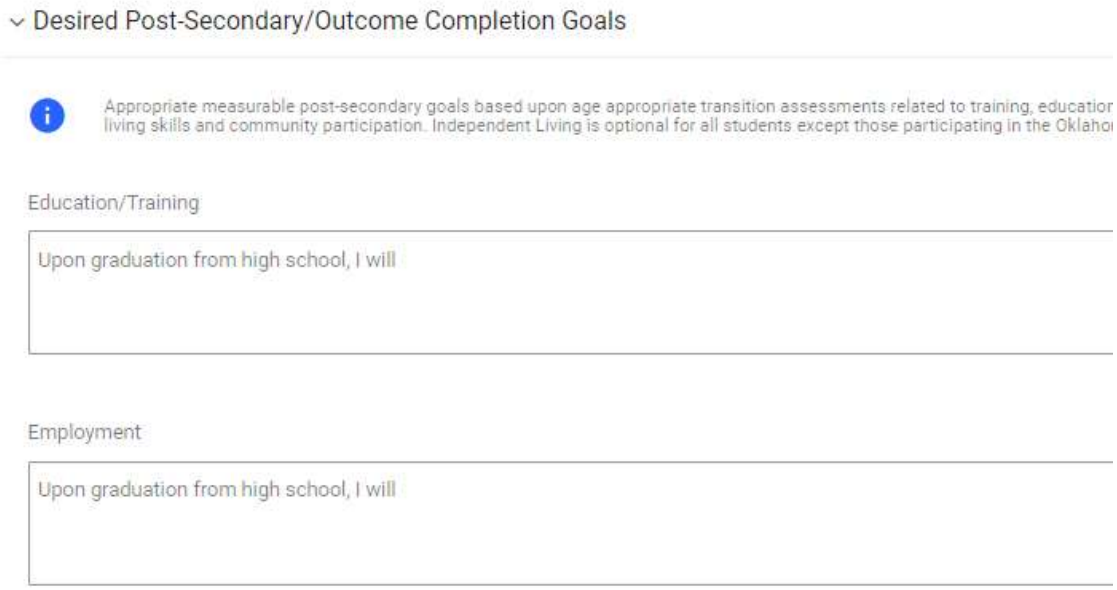
1. From the IEP process tab select the 'Transition Service Plan' link



1. Click ‘Add Assessment’ to enter any transition or vocational assessments.

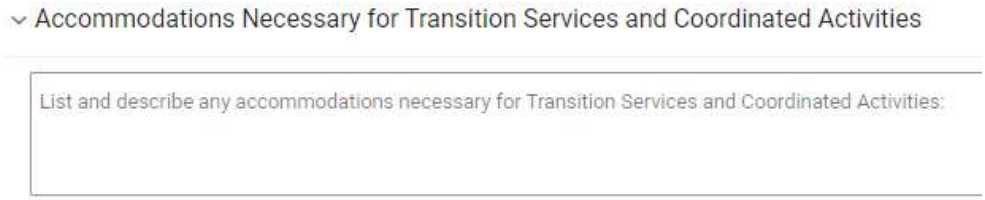


2. Enter the Strengths, Preferences, Interests and Needs.
3. Enter a description of each Post-Secondary and Annual goal in the text boxes.

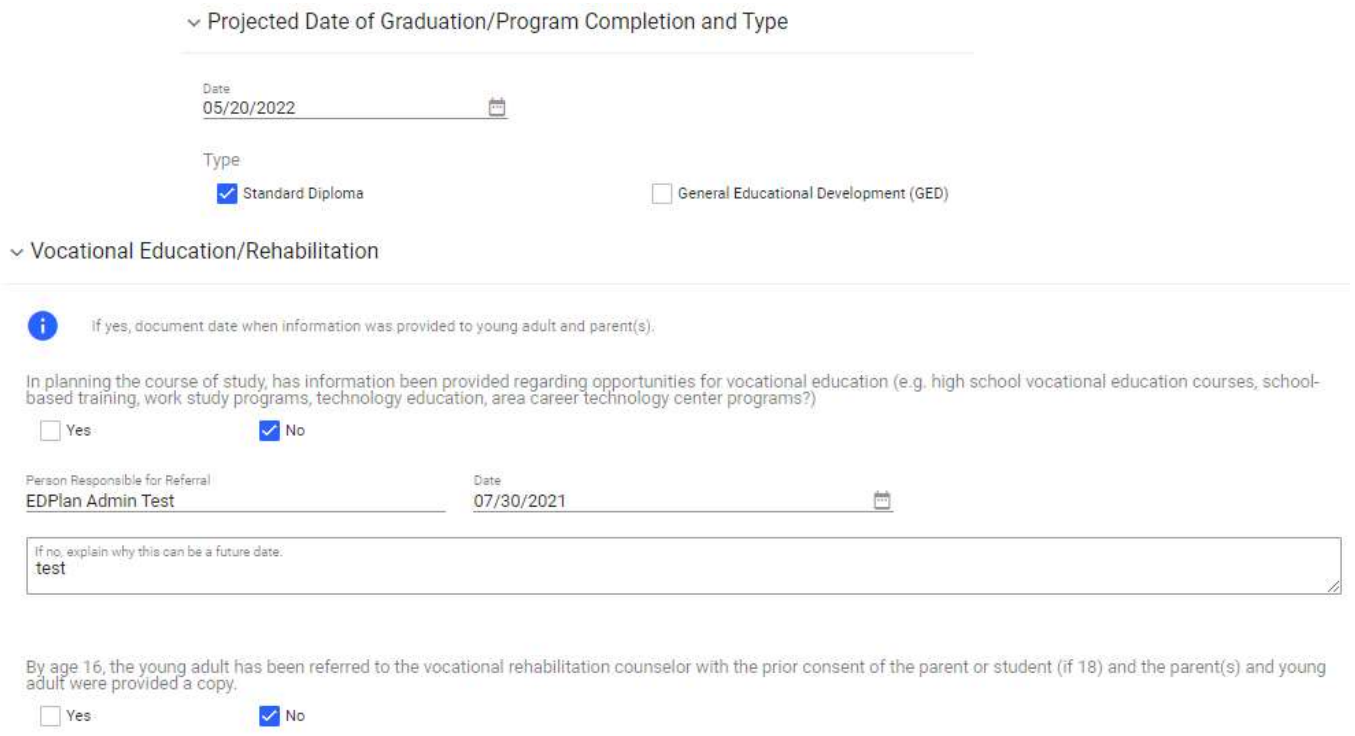


4. Click ‘Add Transition Goals.’ The goal process on the Transition page is the same as the Goals page. Enter appropriate transition goals.

5. Answer the OK Promise question.
6. Select the appropriate curriculum participation.
7. Enter Course of Study information.
8. 'Transition Services and Coordinated Activities'
   - Enter the services/activities in the text field.
   - Enter Person(s) and Agency(s) responsible for the activities.
   - Enter Anticipated Completion Date.
9. List and describe any necessary accommodation(s) in the text field.



10. Enter the date of 'Projected Graduation or Completion.' Indicate yes or no on 'Vocational Education/Rehabilitation,' 'Invitation to Meetings,' and 'Transfer of Rights.'



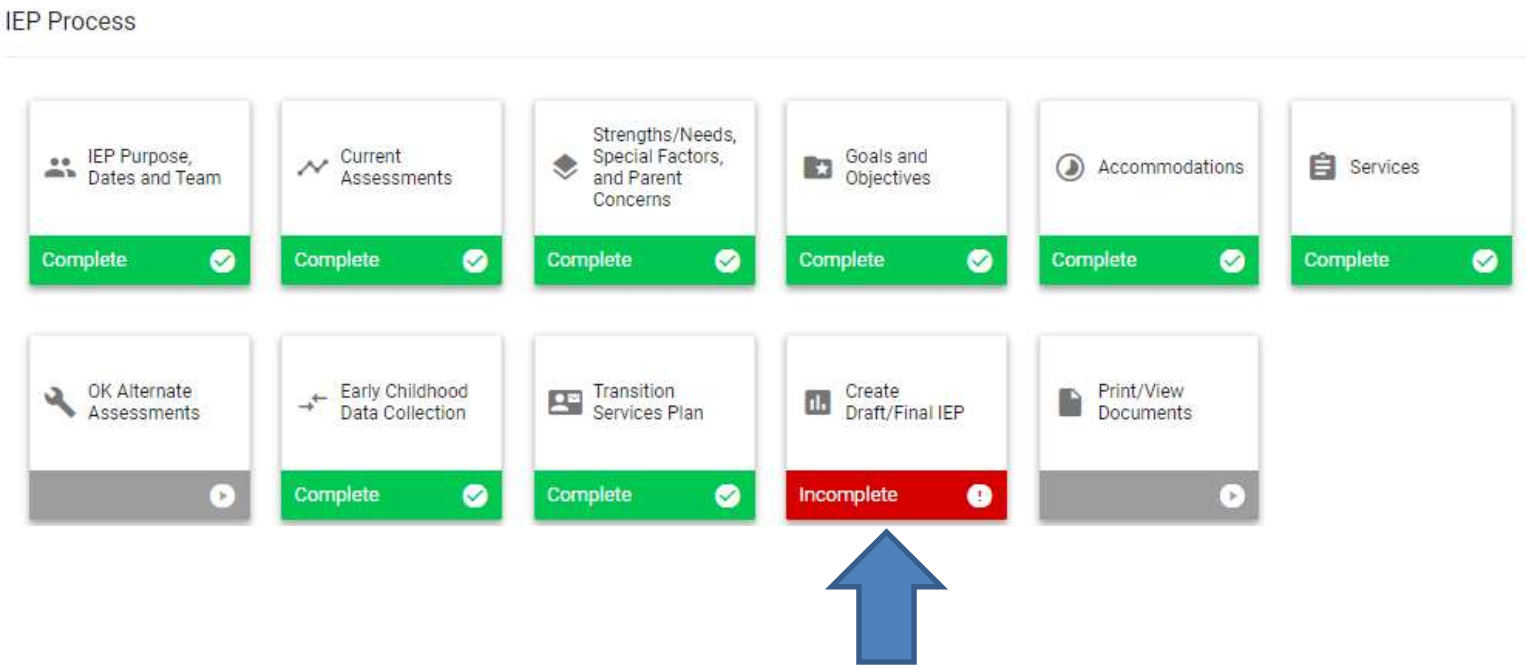
11. Select 'Save and Continue' to check for errors and return to the IEP process page.

The 'Consent for Release of Information' and "Student Summary of Performance' are available on the Transition Page.

Create Draft

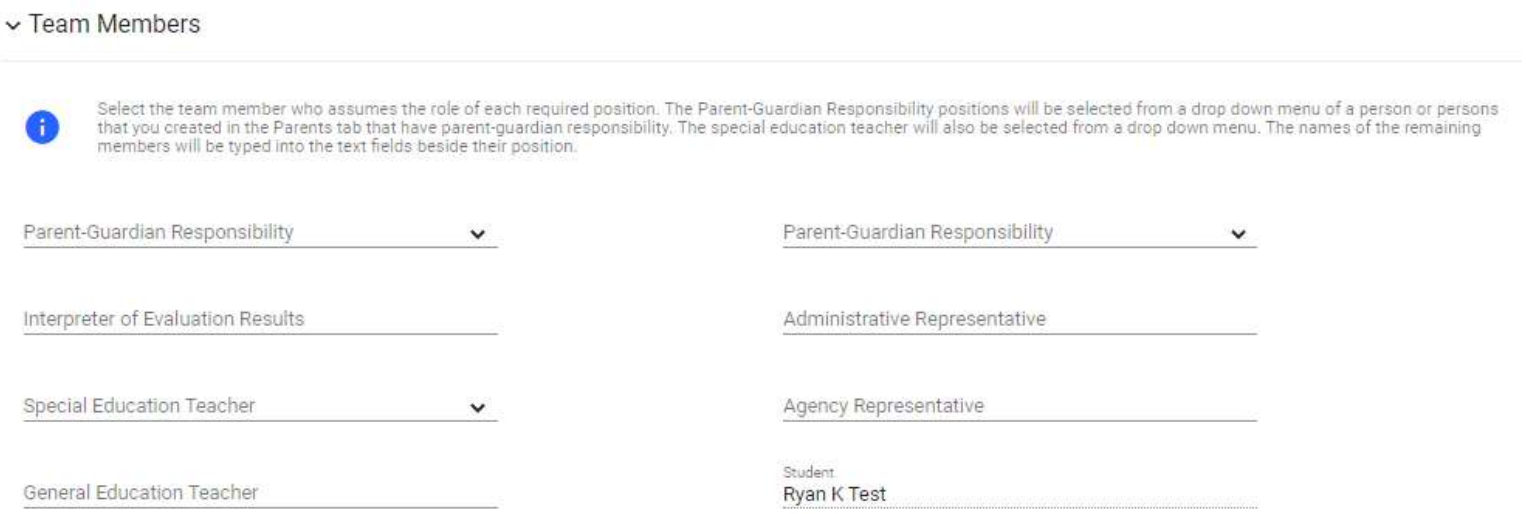
IEP DRAFT DOCUMENT

1. Select the ‘Create Draft’ link on the IEP Process page.

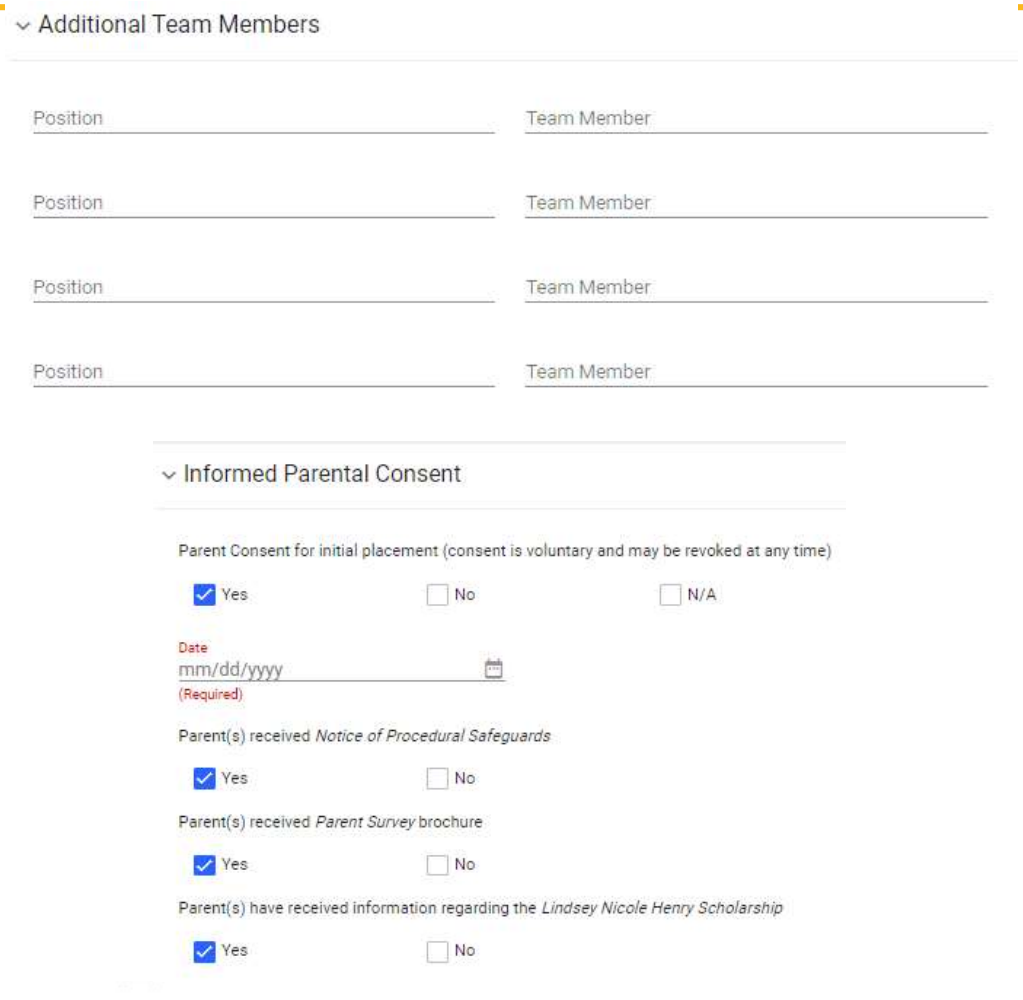


2. Select the ‘Parent/Guardian Responsibility’ and the ‘Special Education Teacher’ using the dropdown list and enter the appropriate names for the ‘Regular Education Teacher’, ‘Interpreter of Evaluation Results,’ and

'Administrative Representative.'



3. Type in the names and positions of any additional team members.
4. If parent(s), guardian(s), and/or child as appropriate did not attend the IEP meeting, explain in the text box.
5. Check 'Yes' or 'No' if Translation/Interpretation is provided. If 'Yes', specify in the text field.
6. Select 'Yes', 'No', or 'N/A' if Parent Consent was received. If 'Yes' is selected enter the date.
7. Check 'Yes or 'No' on the Informed Parent Consent.



12. Select the 'Display IEP Errors' buttons to scan the IEP for missing data.
13. Review any errors and make necessary corrections on the student's IEP workspace. Draft documents can be created even if errors exist within the workspace, but IEPs cannot be finalized until all errors are corrected.
14. Select the 'Create Draft IEP' button to create the IEP draft. Draft documents may be printed for the IEP meeting, and they will include a "Draft" watermark on the document

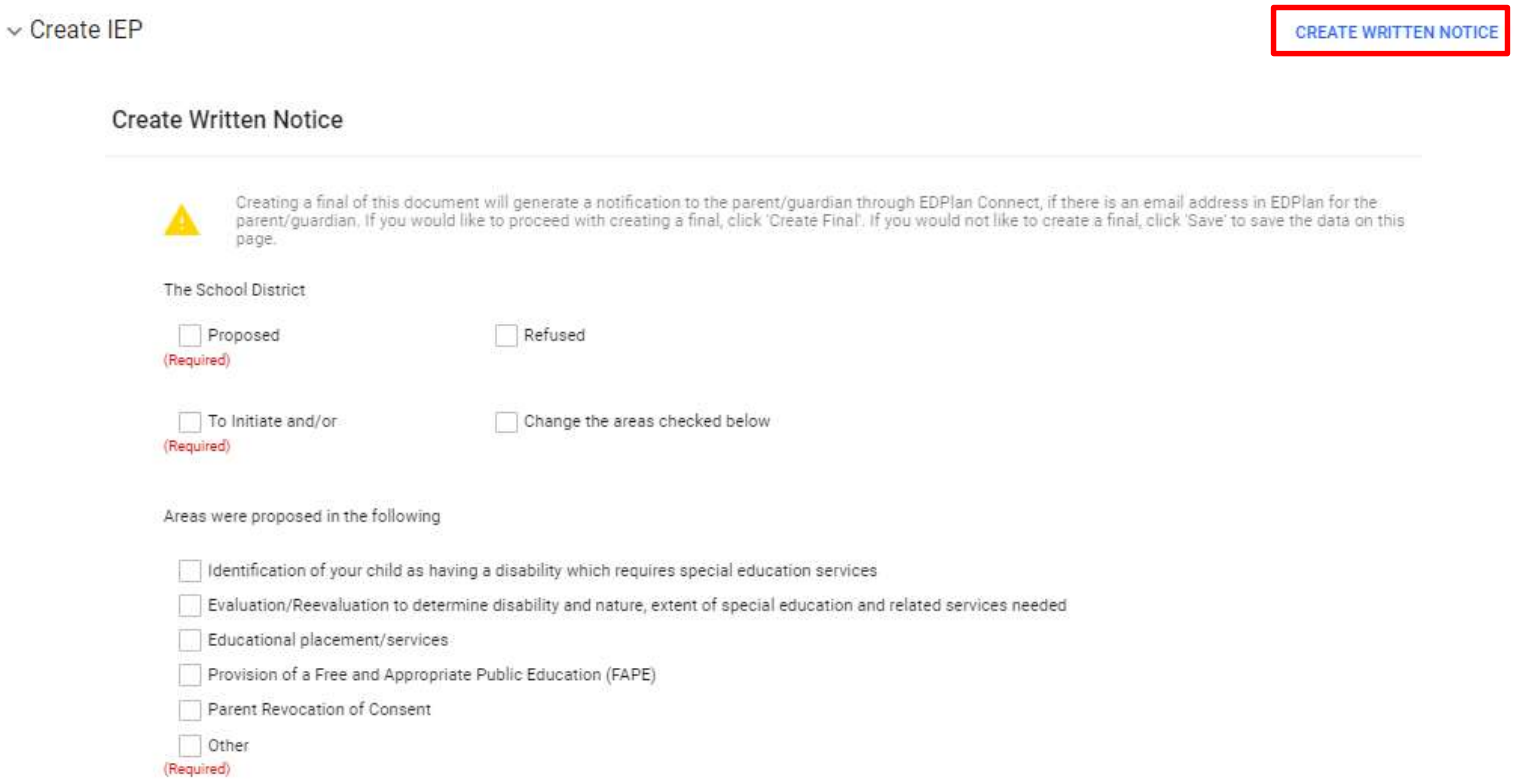
IEP Addendum

The IEP Addendum follows the IEP created in your district. The IEP Addendum dates must fall within the date range of the IEP created in your district. Do not use the same begin date of the IEP created in the previous district. To create an IEP Addendum, update the dates on the Special Ed Services page and Goals & Objectives page. The start and end dates of services must fall within the date range of the IEP Addendum.

Follow the same process of creating the IEP document.

Written Notice

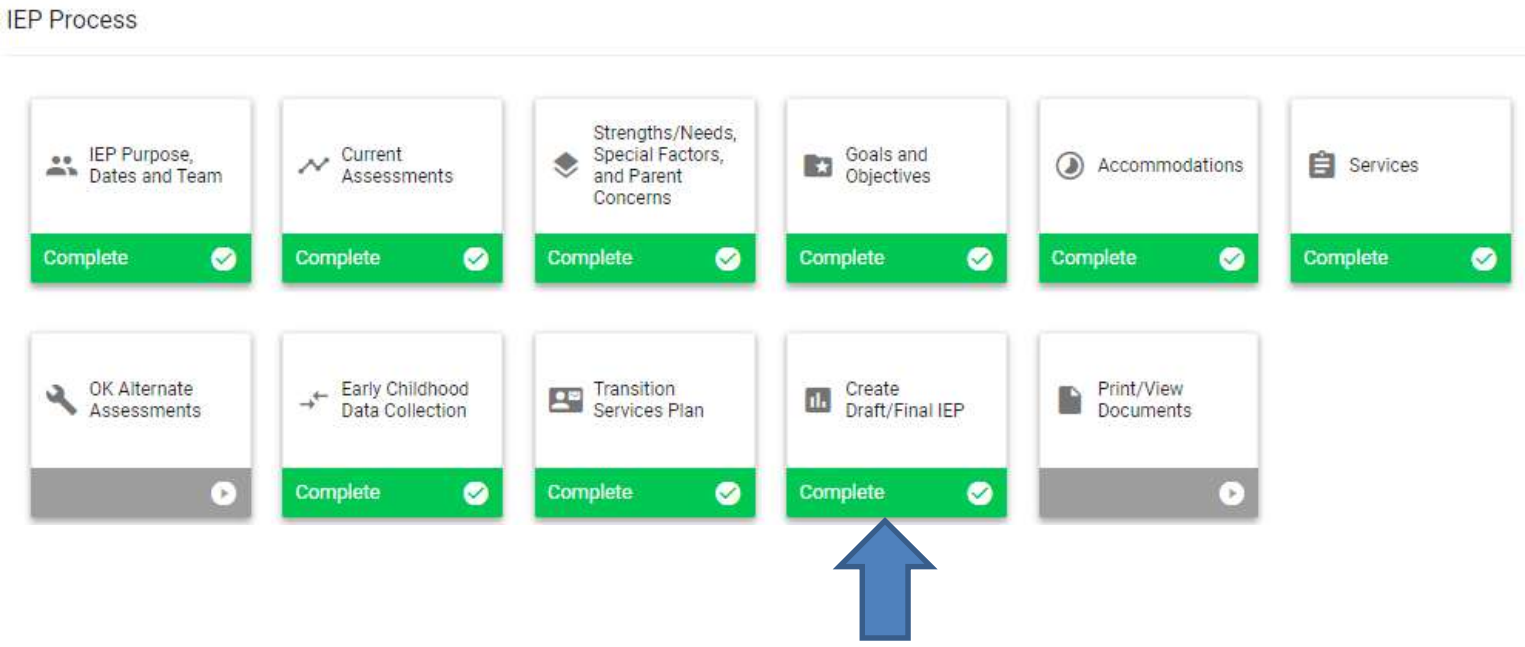
The Written Notice can be completed within the Create Draft page of the 'IEP Process' or it can be completed in the 'Documents' section.



Create Final Page

IEP FINAL DOCUMENTS

From the IEP Process tab, select the 'Create Final' link.

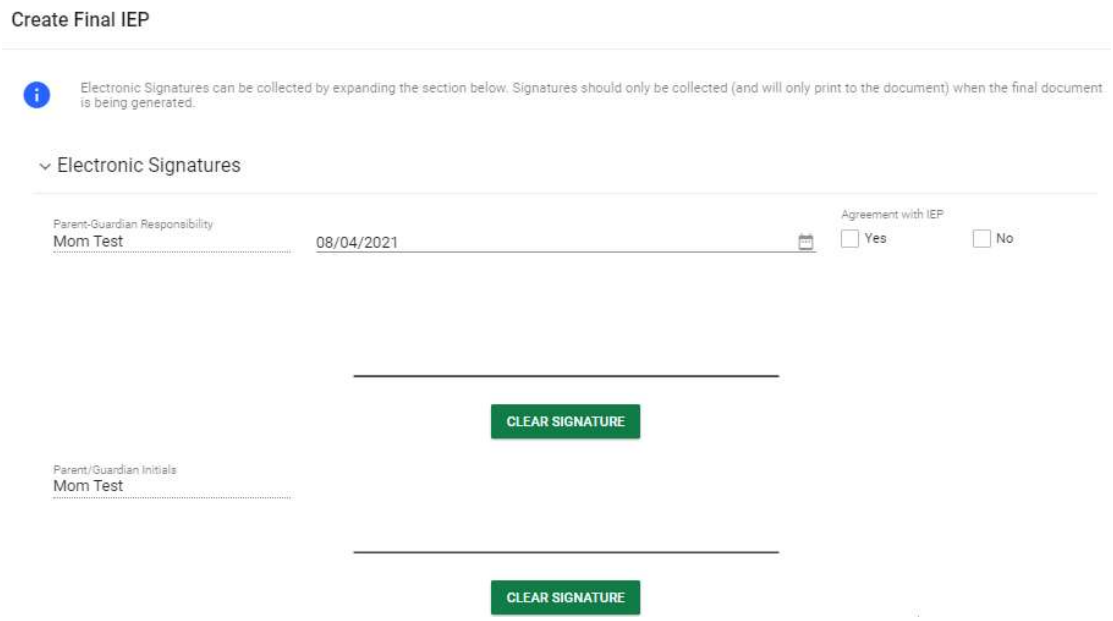


1. Review the IEP dates on the IEP Process landing page.
2. Scroll to the bottom and click 'Display IEP Errors' to review for any errors.
3. If no errors are found, select the 'Create Final IEP' button. Once the IEP or IEP Addendum is created without errors, it is recognized as the currently valid IEP document. **NOTE**: The Create Final IEP button will not appear until after the user clicks to Display IEP Errors.

Electronic Signature

If you are using the electronic signature feature, the signature boxes will display in the Create Final modal popup after 'Display IEP Errors' has been clicked, and all errors have been corrected.

Signature boxes will display for team members entered on the Create Draft/Final page. The date will prepopulate based on the meeting date entered on the IEP Process landing page, but this date field is editable. Team members can also check to indicate agreement/disagreement with the IEP.

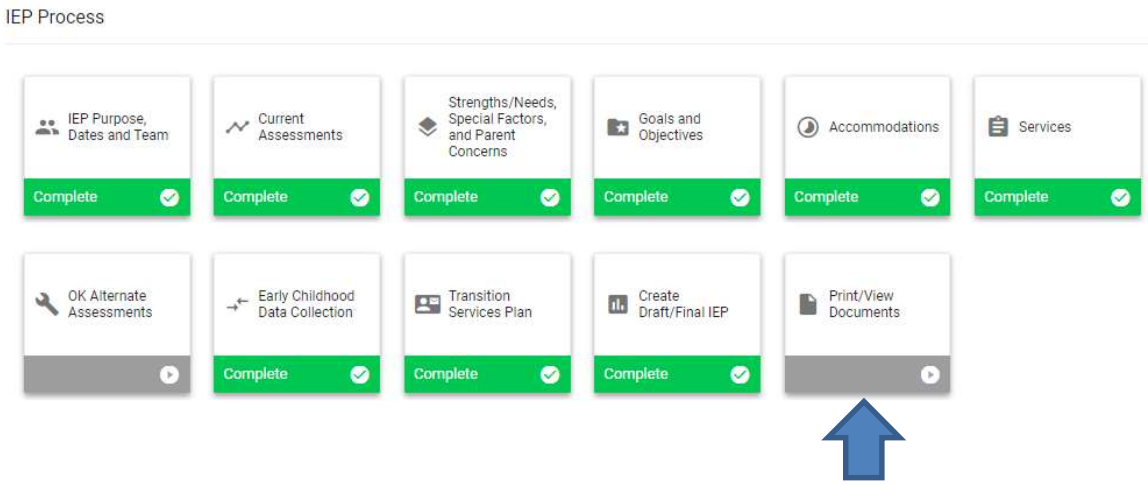


The team member can sign using a mouse, stylus, or finger on a touch screen. Finalizing the IEP will capture the signature on the IEP document.

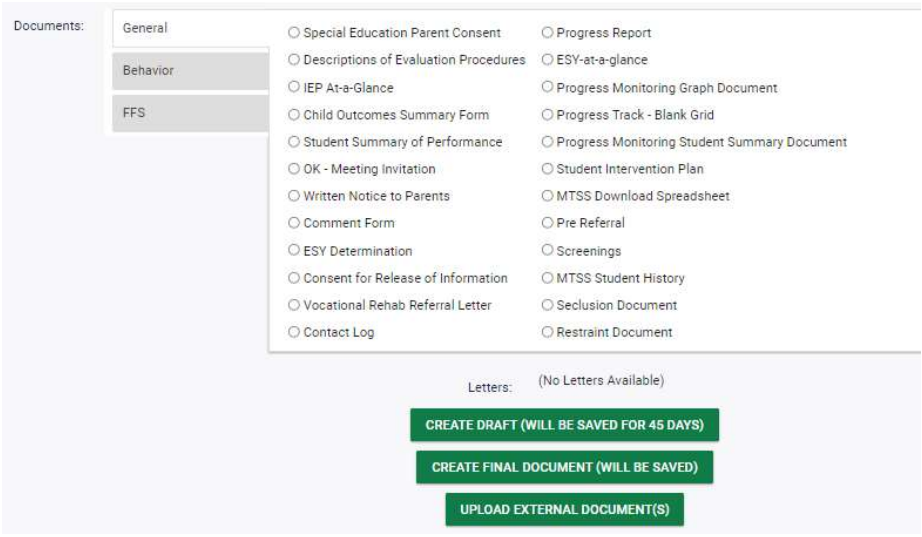
Remember that signatures are only stored on the finalized document, not in EDPlan. If signatures are collected prior to clicking 'Display IEP Errors,' the signatures will not be stored and will have to be collected again.

Print/View Documents Page

Print and View IEP or IEP Addendum documents by selecting the Print/View Documents link on the IEP Process tab.



Documents created from the IEP Process tab may also be viewed on the Documents tab.



Solutions that Matter