OK EDPlan™

Navigation Guide

June 2021
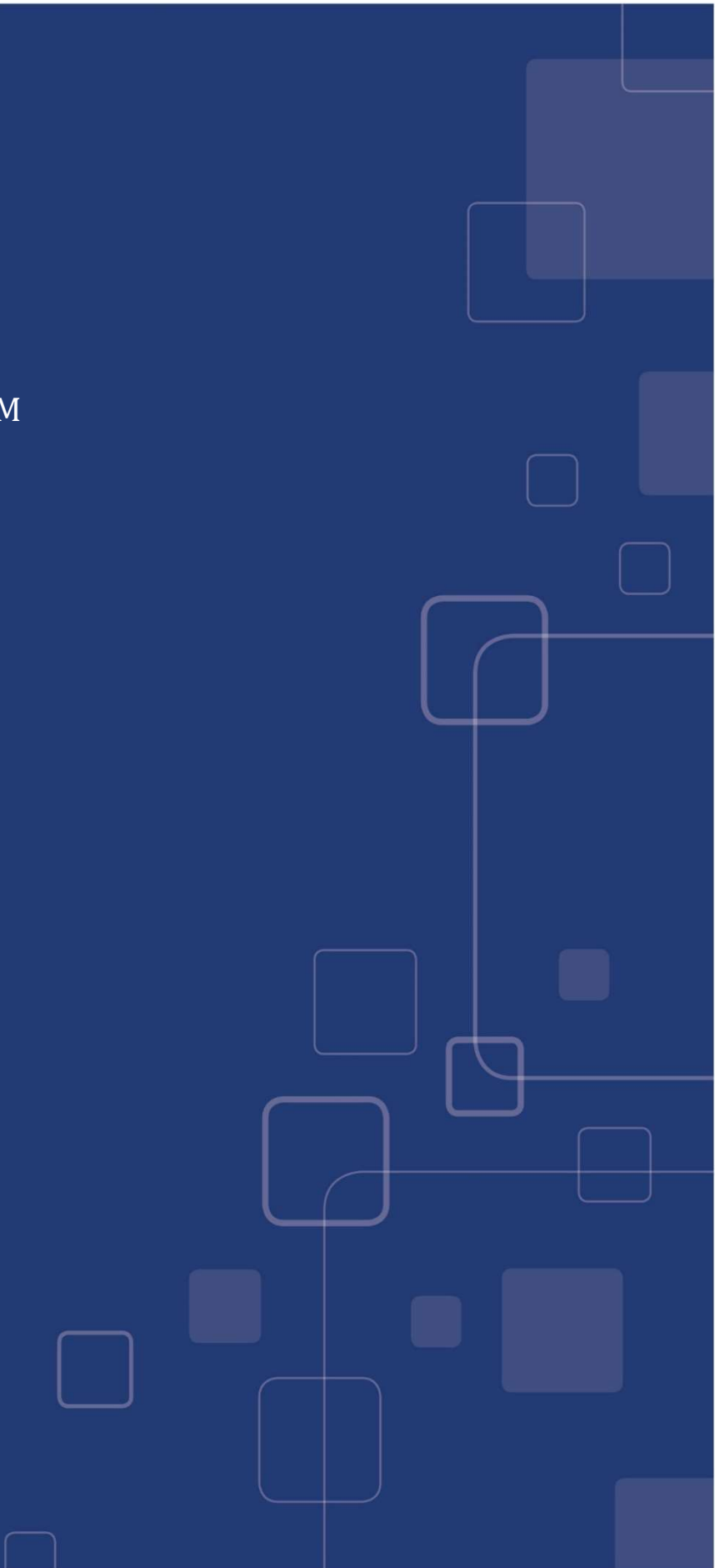
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Page View for Special Educator User Type

Landing Page

The Landing page in EDPlan displays a single *Main Menu* bar at the top.

Under the *Main Menu* bar are several tiles that display *compliance*, *caseload* including links to student files, Student graph of *overdue files*, Graph of *students by disability*, graphs of the *percentage of time in special education* and *students by status*.
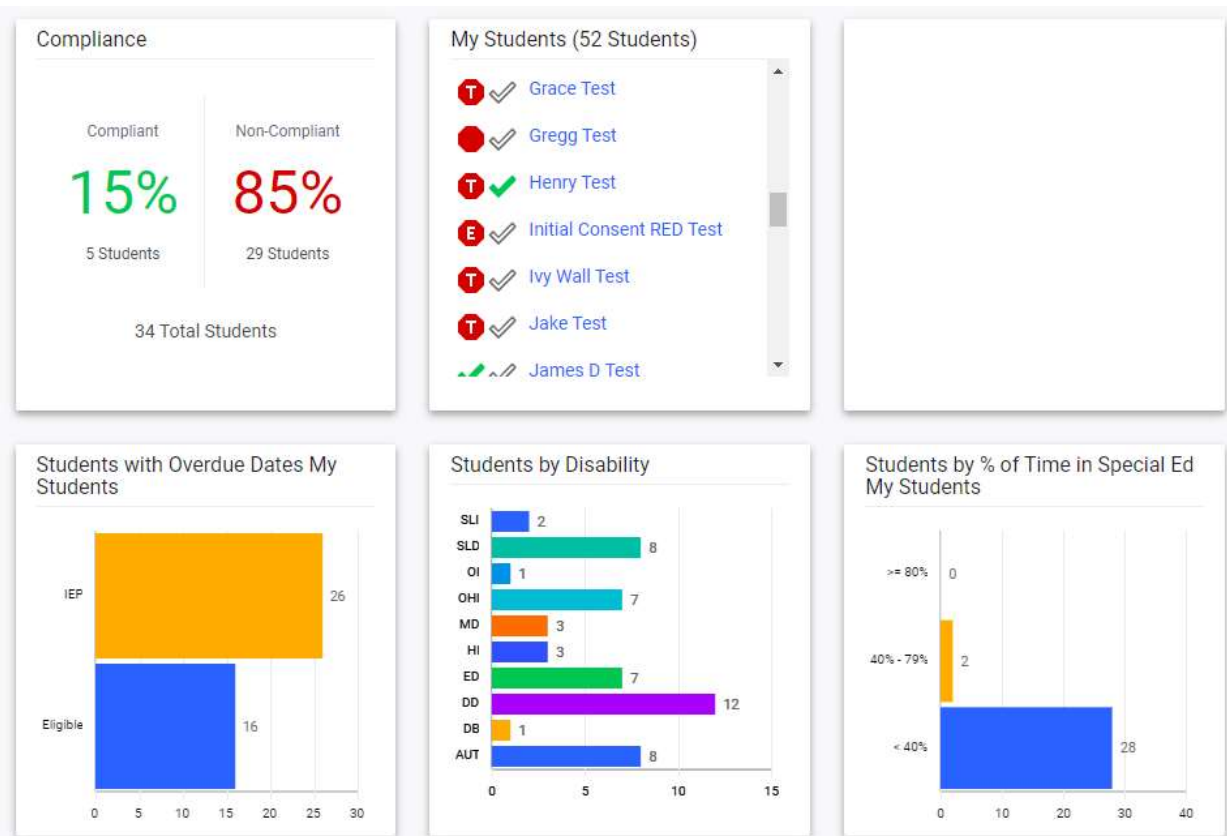
Towards the bottom of the Main Landing Page is the *Message Center and Help Desk.* This is where the user can communicate with EDPlan staff for guidance, questions, comments, and requests.
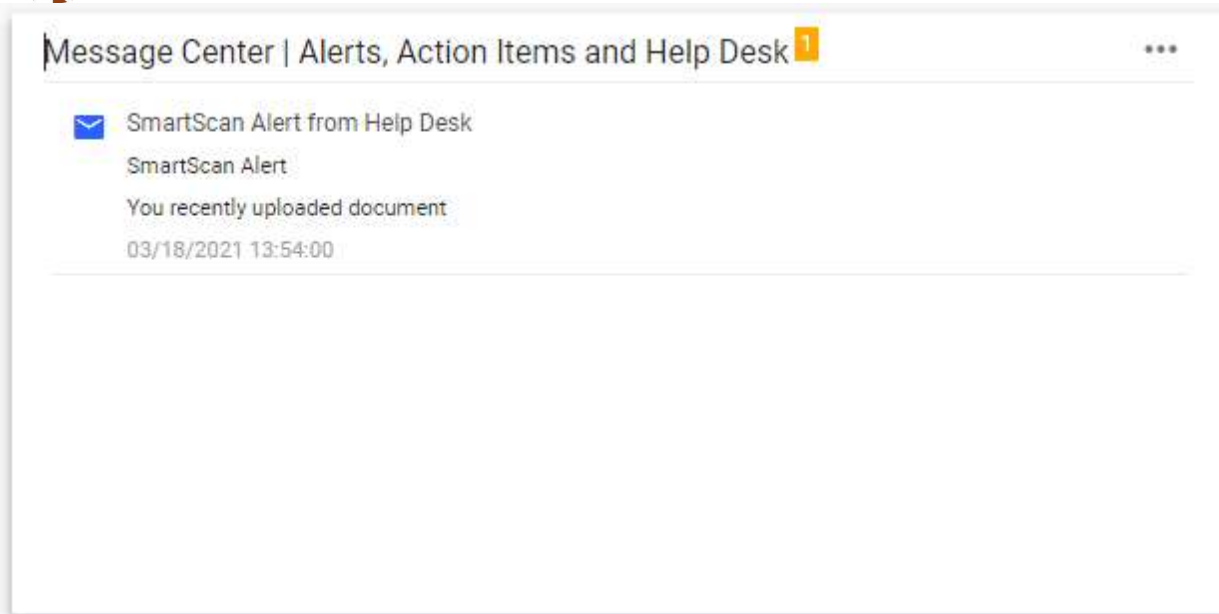
At the bottom of the page is the *'Document'* area. This is a library of documents uploaded by OSDE, EDPlan and Districts.

On the right side of the Landing page, the last column of tiles include:

'My Calendar' tile – This is a link to the user's calendar in EDPlan that can be used to add meetings and events by the user.

'Message of the Day' panel - Messages are posted by OSDE, EDPlan or District EDPlan Administrators. They may include upcoming events such as release dates of enhancements, trainings, meetings, when maintenance of EDPlan requires a shutdown of a system, Known issues with the program, etc.

My Calendar   •••

‹ MAR   APRIL 2021   MAY ›

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

OK EDPlan 2020 Updates released on 6/14/2020

The 'EDPlan Summer 2020 Updates' have been released.

A document showing all the enhancements is located at the bottom of this page under the 'Help Links' tab

and titled, "EDPlan Summer 2020 Updates".

Professional Learning Opportunity for Special Education Staff

The Oklahoma Department of Education (OSDE) partnered with Public Consulting Group to provide online professional learning opportunities for teachers and staff in Oklahoma. Please see the 'OSDE Pepper Offerings and Quick Start Guide' posted in the Help Links section on the main menu for available courses and how to get started.

01/24/2020 KNOWN ISSUES BEING WORKED ON BY PCG

1. Students ages are now calculating correctly

Please note, if you see anything that could potentially be a bug or issue in EdPlan please message the board using the message type "Bug Report." Thank You!

Sub Menus appear underneath the *Main Menu* once the user chooses an area to navigate in **EDPlan.**
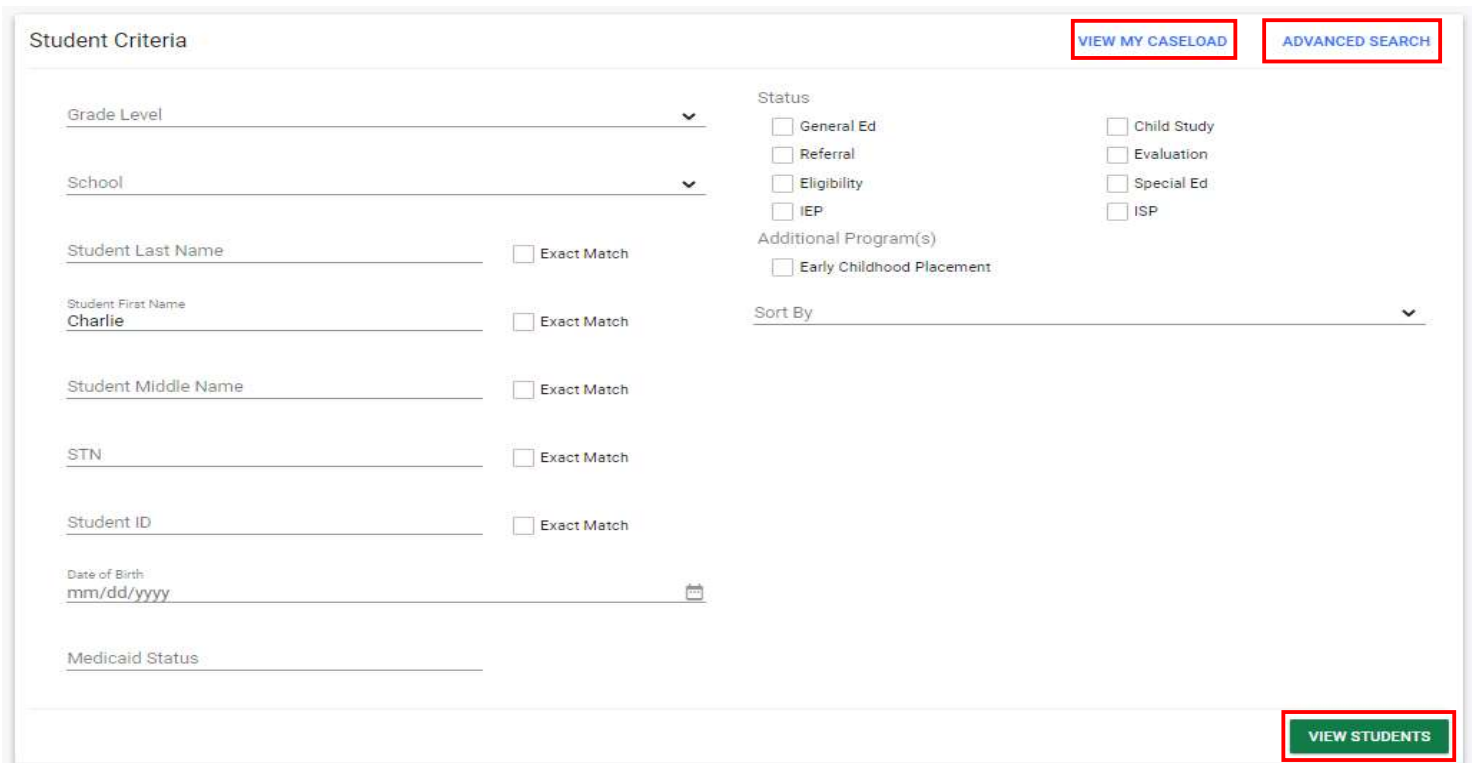
Students

Once the user chooses *'STUDENTS'* on the top bar, the *Sub Menu* appears beneath the *Main Menu* with more options.

Under *'STUDENTS'*, the choices include:

'STUDENT SEARCH' – Clicking on *'STUDENT SEARCH'* displays a Panel.

The user can enter the search criteria such as **'Student Last Name'** and or other criteria such as **'Special Ed'**, **'ISP'**, etc. Once the user has entered the search Criteria, the user can click the Green *'View Students'* button at the bottom right corner which will display all students that match the criteria.

'VIEW MY CASELOAD' in the upper right corner will open to the user's caseload.
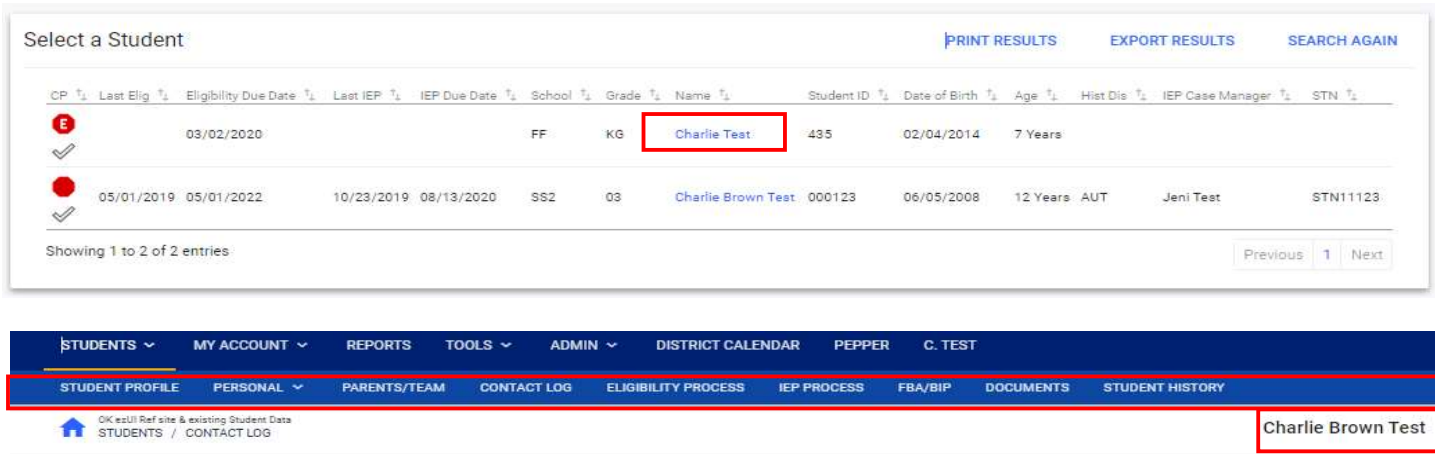
'ADVANCED SEARCH' in the upper right corner will open more options for filtering students.

'RECENT STUDENTS' – Includes the most recent student files that the user has accessed.

'INACTIVE STUDENTS' – (Based on user type) Includes access to students that have been inactivated in the district and can be filtered by School, Name, DOB, STN, Exit Dates Exit Reason, Etc.

Once the user completes the search criteria and clicks *'View Students'* button, a panel opens with the students that fit the criteria:

Clicking on the student's name opens the student's records. The user can navigate in the records buy using the **Sub Menu.** (The student's name appears on the right side below the Sub Menu)

The **Sub Menu** includes:

'STUDENT PROFILE' – Displays student program information and Personal Information.

'PERSONAL' – Displays the student's personal information, provided by the District's Student Information System.

Parents/Team

Displays the Parent/Guardian and IEP Team Members areas and is where the user can enter/edit Parent information.

The user can also edit/add IEP Team members and Behavior team members from this tab by choosing *'Special Education'* or *'BehaviorPlus'* link.

Contact Log

This page is editable and displays the parent and non– parent contacts. Users can add a contact by clicking the blue words *'ADD A CONTACT'* on the right side of the panel.

Eligibility Process

'ELIGIBILITLY PROCESS' – This displays Tiles that are required to complete the Eligibility Process. The user will click on the tile to open the page.

IEP Process

'IEP PROCESS' - This displays Tiles that are required to complete the IEP Process. The user will click on the tile to open the page.

FBA/BIP

'FBA/BIP' – This displays the FBA/BIP documents for creating a Functional Behavior Assessment and/or the Behavior Intervention Plan.

1. Summary

2. Complete Student Profile/Social Dev History/Interviews

3. Identify Team

4. Complete Observation/Collect A-B-C Data

5. Create Behavior Intervention Plan (BIP)

6. View/Log Monitoring Data

7. Conduct Progress Review

Documents

This opens to the document section for the student. The user can choose documents from this section to create drafts and final documents. The document categories include 'General', 'Behavior' and 'FFS' Documents.

Charlie Brown Test

Documents:

General
Behavior
FFS

○ Special Education Parent Consent   ○ Contact Log
○ Descriptions of Evaluation Procedures   ○ Progress Report
○ IEP At-a-Glance   ○ ESY-at-a-glance
○ Child Outcomes Summary Form   ○ Progress Monitoring Graph Document
○ Student Summary of Performance   ○ Progress Track - Blank Grid
○ OK - Meeting Invitation   ○ Progress Monitoring Student Summary Document
○ Written Notice to Parents   ○ Student Intervention Plan
○ Comment Form   ○ MTSS Download Spreadsheet
○ ESY Determination   ○ Pre Referral
○ Consent for Release of Information   ○ Screenings
○ Vocational Rehab Referral Letter   ○ MTSS Student History

Letters: (No Letters Available)

CREATE DRAFT (WILL BE SAVED FOR 45 DAYS)

CREATE FINAL DOCUMENT (WILL BE SAVED)

UPLOAD EXTERNAL DOCUMENT(S)

The 'Documents' page also includes the drafts and finalized documents that have completed for the student. Users can click on the document to view a PDF version of the draft, finalized or uploaded document(s).

Documents created for Charlie Brown Test

Doc ID	Date Generated	Generated By	Document		Batch	Status	Signatures
6445	12/11/2020	Gary Scott	Student Intervention Plan	PDF	☐	☐	
6444	12/11/2020	Gary Scott	MTSS Student History	PDF	☐	☐	
5512	10/23/2019	Jill Burroughs	IEP Addendum	PDF	☐	Accepted	VIEW
5481	10/20/2019	Jill Burroughs	IEP Addendum	PDF	☐	Accepted	VIEW
5043	08/13/2019	Jill Burroughs	OK IEP	PDF	☐	Accepted	VIEW
4743	05/01/2019	Jill Burroughs	OK Eligibility - MEEGS	PDF	☐	Accepted	VIEW
4741	05/01/2019	Jill Burroughs	OK Eligibility - RED	PDF	☐	☐	VIEW
4168	08/21/2018	Jill Burroughs	OK Eligibility - RED	PDF	☐	☐	VIEW
3856	07/03/2018	Jill Burroughs	OK Eligibility - RED	PDF	☐	☐	VIEW
3840	06/18/2018		OK IEP	PDF	☐	Accepted	VIEW
3839	09/23/2015		Progress Report (2015-2016 - Reporting Period 4)	PDF	☐	☐	
3838	09/16/2015		OK Eligibility - RED	PDF	☐	☐	VIEW
3837	08/28/2015		OK IEP	PDF	☐	Accepted	VIEW
3836	08/04/2015		Special Education Parent Consent	PDF	☐	☐	VIEW

Student History

Displays the Event History for the student.

My Account

Choosing **'MY ACCOUNT'** on the top bar opens the **Sub Menu** appears beneath the **Main Menu** with more options.

Under **'MY ACCOUNT'**, the choices include:

'MY DOCS' -- This page lists documents you've created, or that were created by someone else for Students for whom you are the Teacher of Record.

'MY REPORTS' – This page lists reports you've generated.

**'MY INFO'** – This page is where the end-user can update Password Information, Name, Title, Email Address, Phone, Etc.

'MY MESSAGES' - This page displays all messages you have sent in the EdPlan™ system and the responses that you have received. Users can also search previous messages.

'MY CALENDAR' – This page displays the user's calendar based on what is on the District Calendar. The user can add meetings, events, etc.

Reports

Once the user chooses *'REPORTS'* on the top bar, tiles appear to choose reports. The number of tiles that appear depend on the user type/rights each user has in EDPlan.
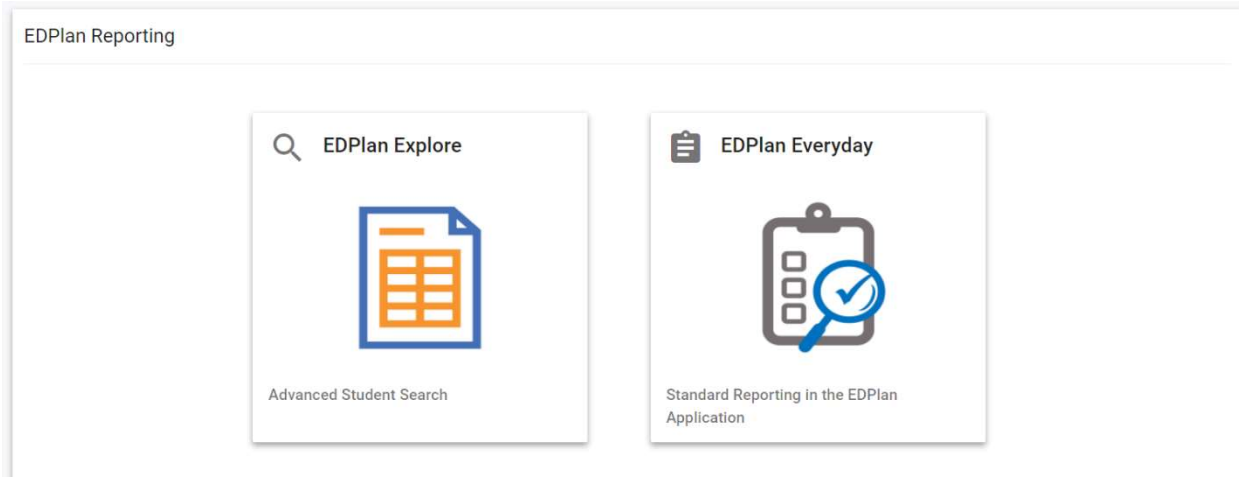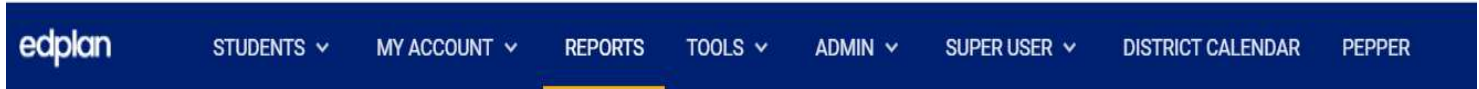

By clicking on the *'EDPlan Explore'* tile, also known as 'Advanced Student Search', the student search can be expanded by filtering by Status, Programs, Compliance, Disabilities, Related Services, Special Ed Services, etc.

By clicking on the *'EDPlan Everyday'* tile, considered to be the *'Standard Reporting in EDPlan'*, the page opens to reports that can be run based on the user type and rights. Reports may include Service Log Reports, Reports for Eligibility/IEP, Data/End of Year Reports, 504 Reports, General Reports, SoonerCare/FFS Reports.

Tools

Once the user chooses *'TOOLS'* on the top bar, the **Sub Menu** appears beneath the **Main Menu** with more options depending on user type. For the Special Educator type, the options include *'WIZARDS'* and *'SMARTSCAN'*.
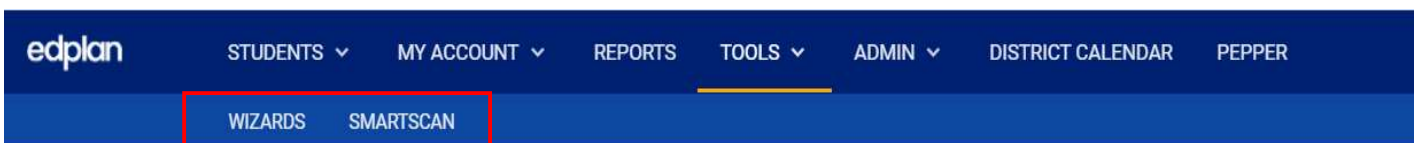
'WIZARDS' opens user-type specific tools that are used for working and documenting for a large group of students. The wizards include, but are not limited to:

> *'Caseload Set-up Wizard'*
>
> *'IEP AT-A Glance Wizard'*
>
> *'Progress Report Wizard'*
>
> *'IEP Progress Monitoring Wizard'*

'SMARTSCAN' is a paperless document management solution for EDPlan. Uploading EDPlan documents into student files including OK IEP's, signature pages, etc.

Admin

Once the user chooses *'ADMIN'* on the top bar, the **Sub Menu** appears beneath the **Main Menu** with more options.

Under *'ADMIN'*, the choices include:

'DISTRICT INFO' -- This page displays the District information including the School Year, School System Code, Address, Phone and Fax numbers, etc.
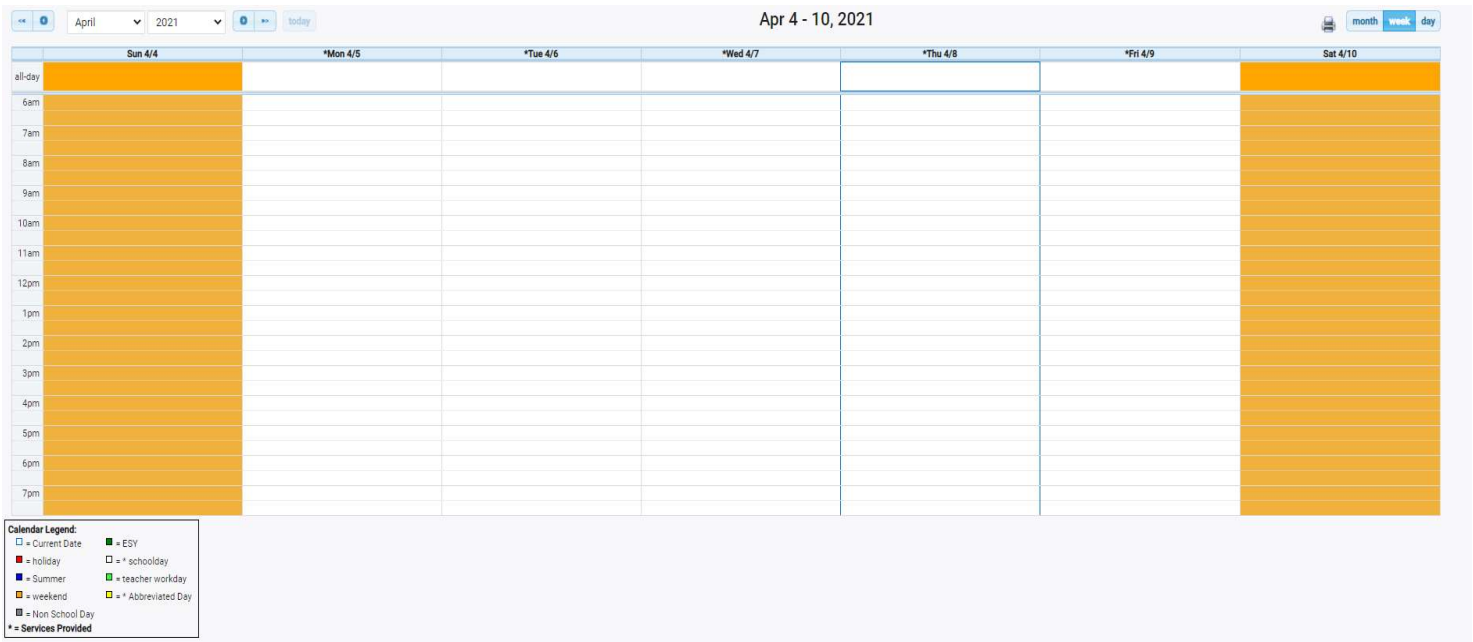
'SCHOOLS' – This page displays School Site information for school site(s) and external School(s). Information includes Site Calendars, Compliance, School Name, Site Abbreviations, Site Codes, Address, Phone/Fax numbers, etc.

District Calendar

Clicking on *'DISTRICT CALENDAR'* will display the current school district's board approved calendar.

The **'District Calendar'** opens and the user will be able to view the District's board approved calendar.   (This calendar is only editable for the EDPlan Administrator user-type)

Pepper

Clicking on **'PEPPER'** redirects the user to the 'Pepper' website.