

OK EDPlan™

Navigation Guide

June 2021

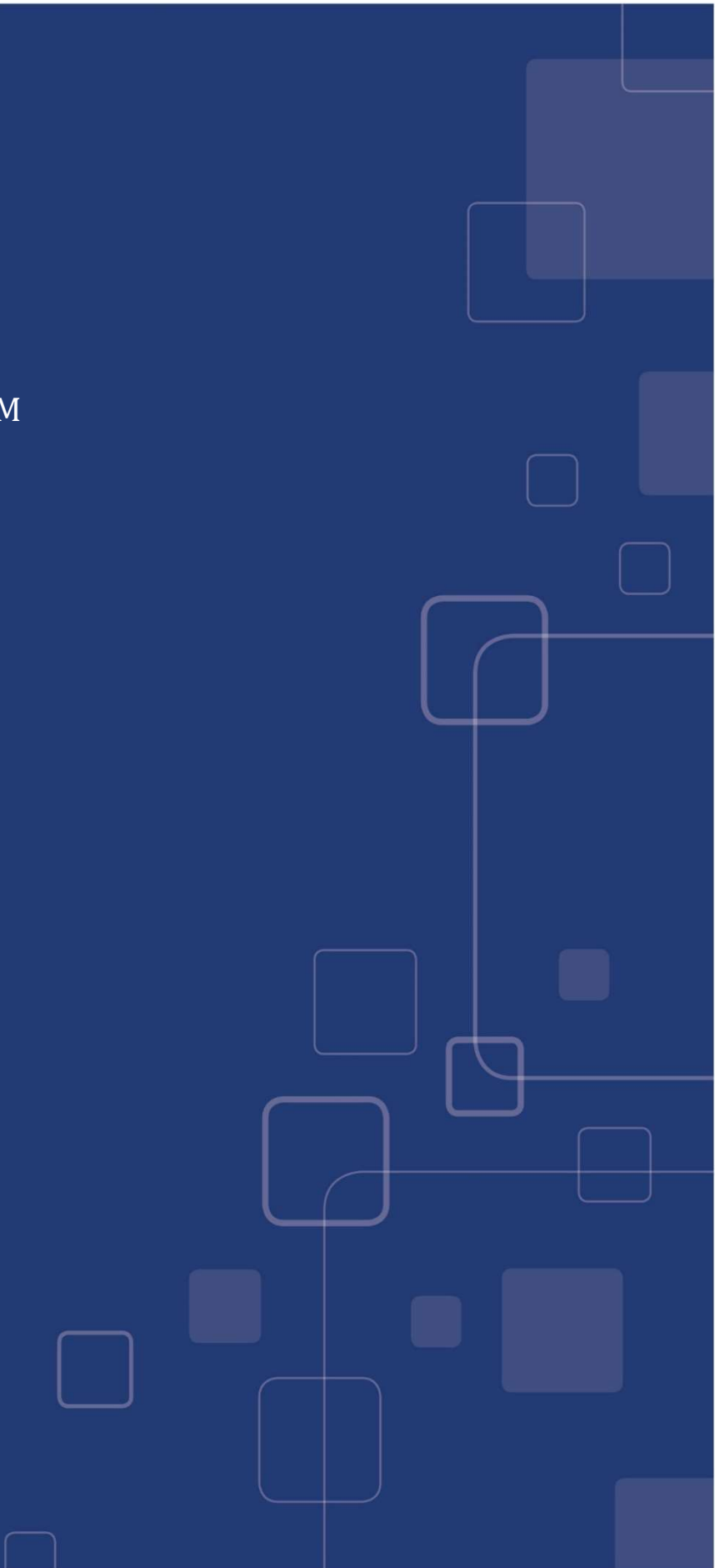


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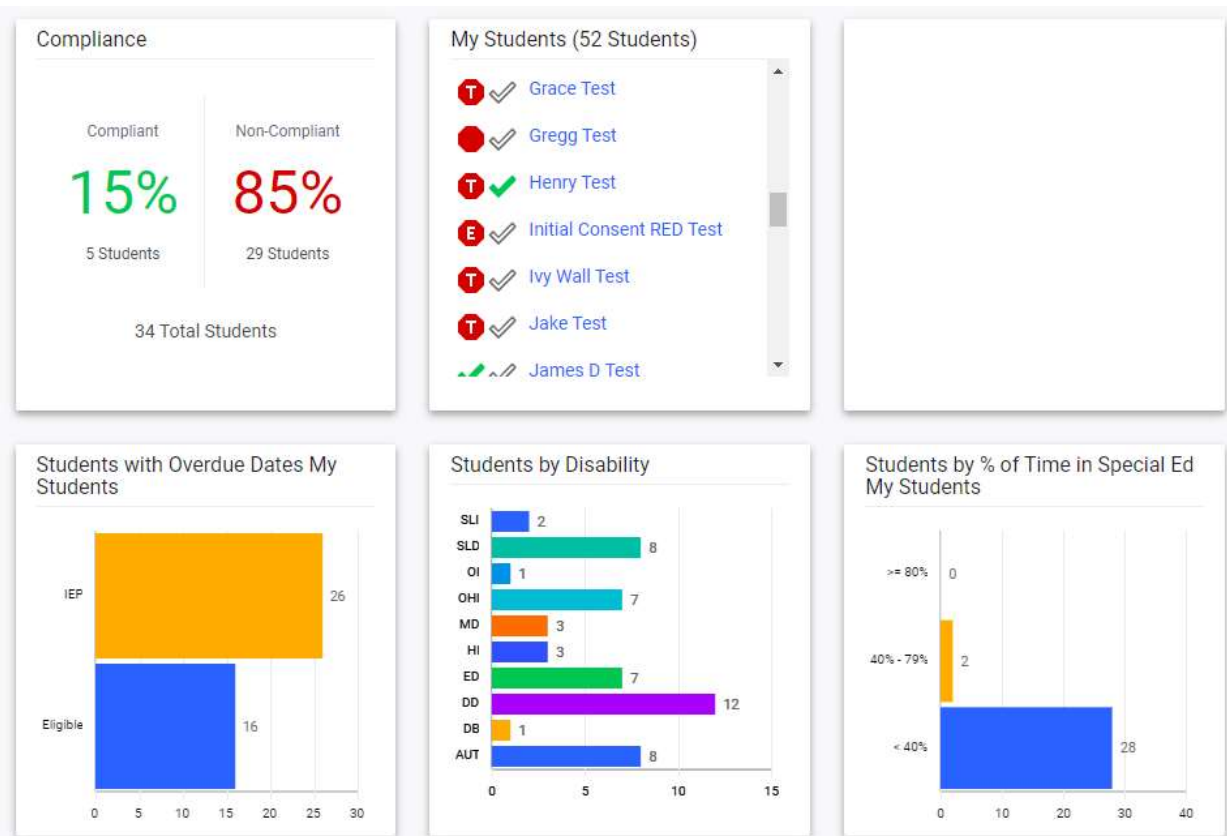
Page View for Special Educator User Type

Landing Page

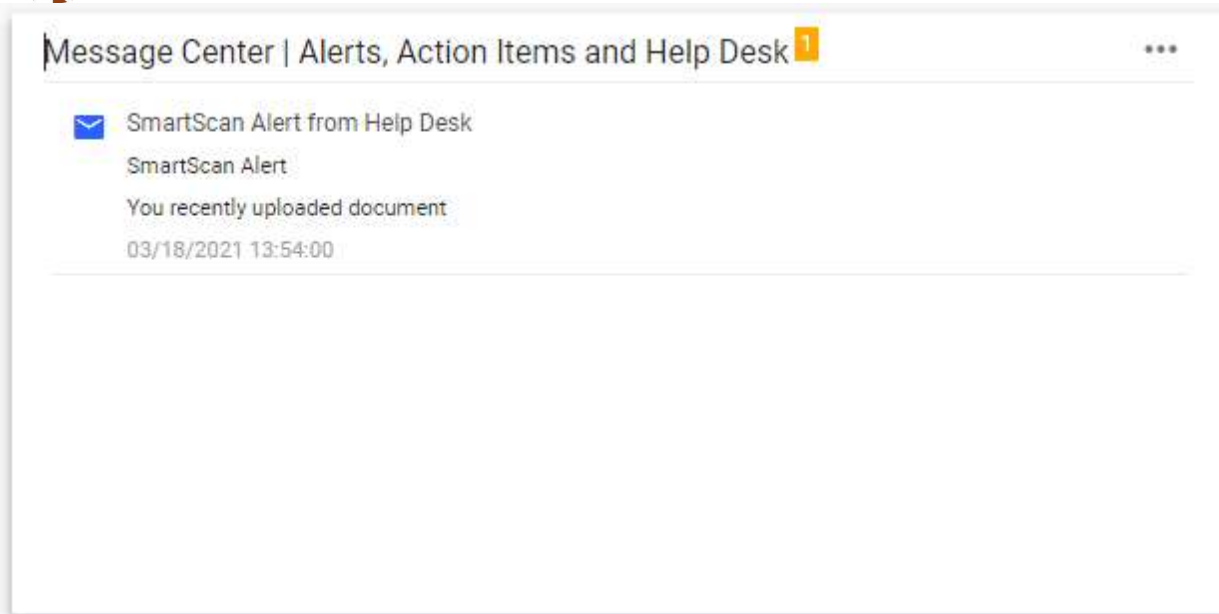
The Landing page in EDPlan displays a single *Main Menu* bar at the top.



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.

Documents SAVE ...

General Files Special Education 504 District State Help Links SoonerCare (Medicaid-FFS)

Del	Pos	File Type Category	File Type	Date Uploaded	Uploaded By	File Name
<input type="checkbox"/>		▼		01/05/2021	Scott Jones	test_doc.docx
<input type="checkbox"/>	140	▼		10/01/2019	Angela Kwok	Lindsey_Nicole_Henry_Scholarship.pdf

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**.

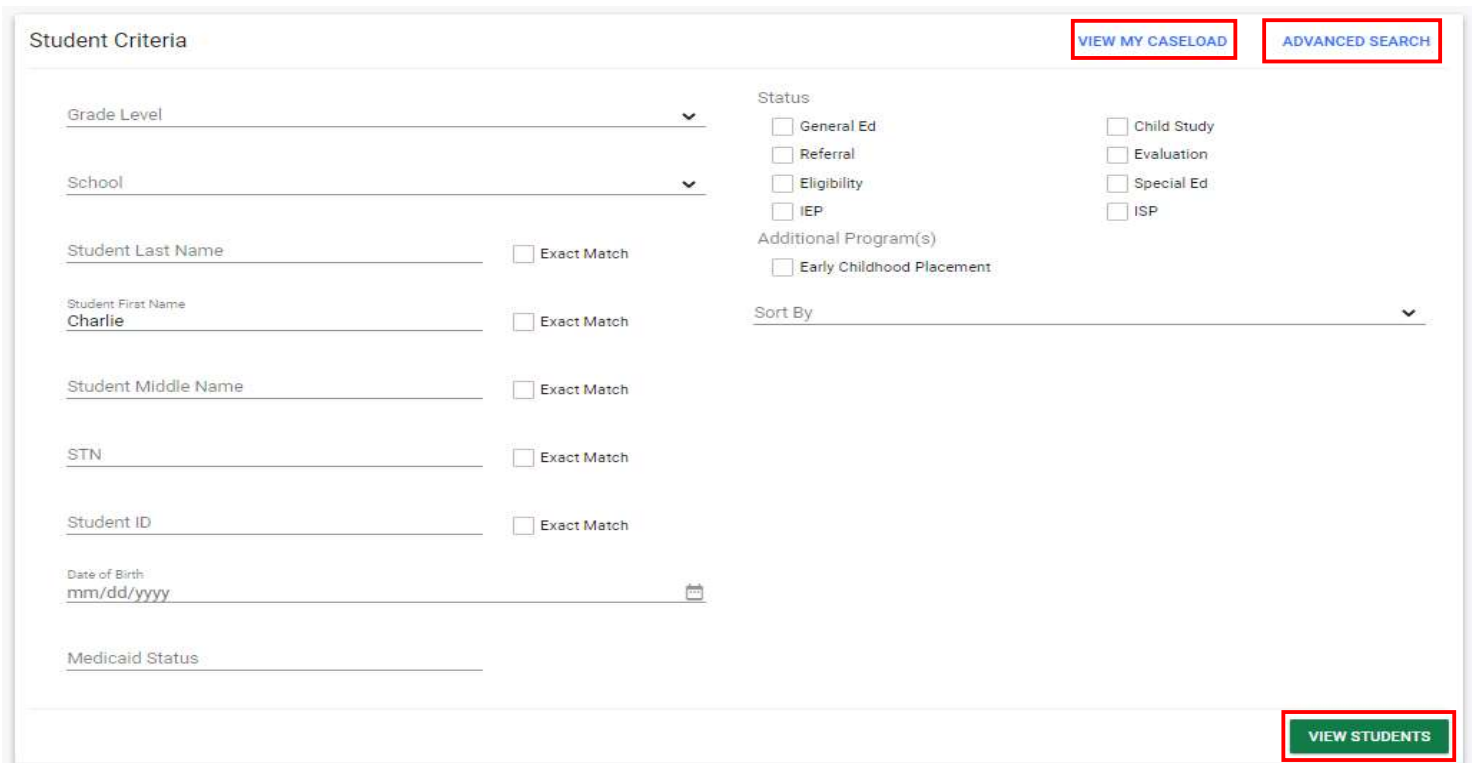
Students

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.



Student Criteria

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

Grade Level

School


Student Last Name Exact Match

Student First Name Charlie Exact Match

Student Middle Name Exact Match

STN Exact Match

Student ID Exact Match

Date of Birth mm/dd/yyyy 

Medicaid Status

Status

General Ed Child Study

Referral Evaluation

Eligibility Special Ed

IEP ISP

Additional Program(s)

Early Childhood Placement

Sort By

[VIEW STUDENTS](#)

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.

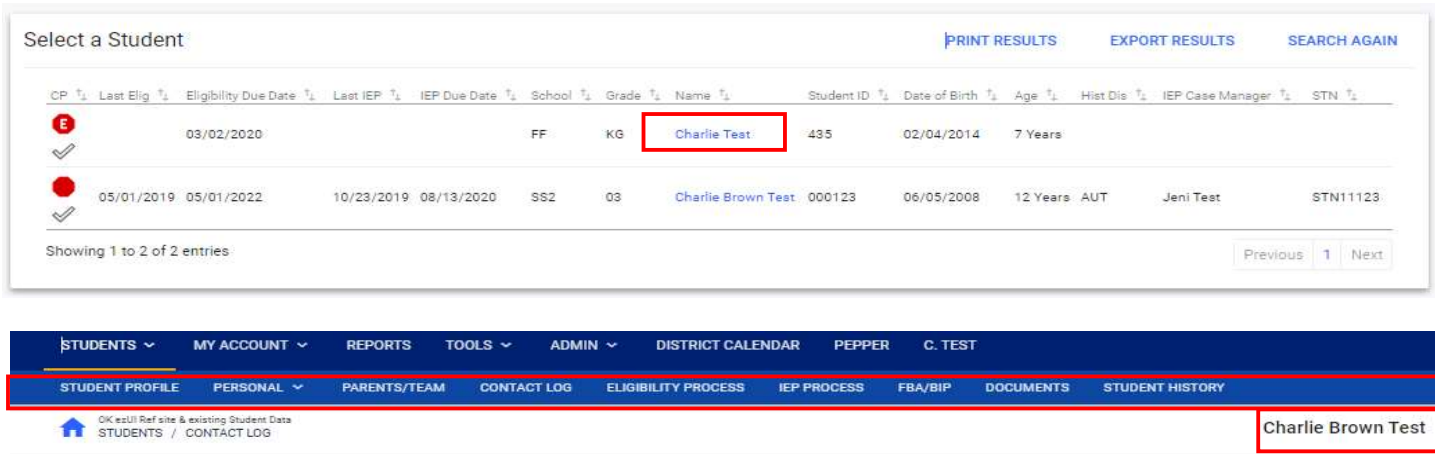
'ADVANCED SEARCH' in the upper right corner will open more options for filtering students.

'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)



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	STN
		03/02/2020			FF	KG	Charlie Test	435	02/04/2014	7 Years			
	05/01/2019	05/01/2022	10/23/2019	08/13/2020	SS2	03	Charlie Brown Test	000123	06/05/2008	12 Years	AUT	Jeni Test	STN11123

Showing 1 to 2 of 2 entries

Previous 1 Next

STUDENTS MY ACCOUNT REPORTS TOOLS ADMIN DISTRICT CALENDAR PEPPER C. TEST

STUDENT PROFILE PERSONAL PARENTS/TEAM CONTACT LOG ELIGIBILITY PROCESS IEP PROCESS FBA/BIP DOCUMENTS STUDENT HISTORY

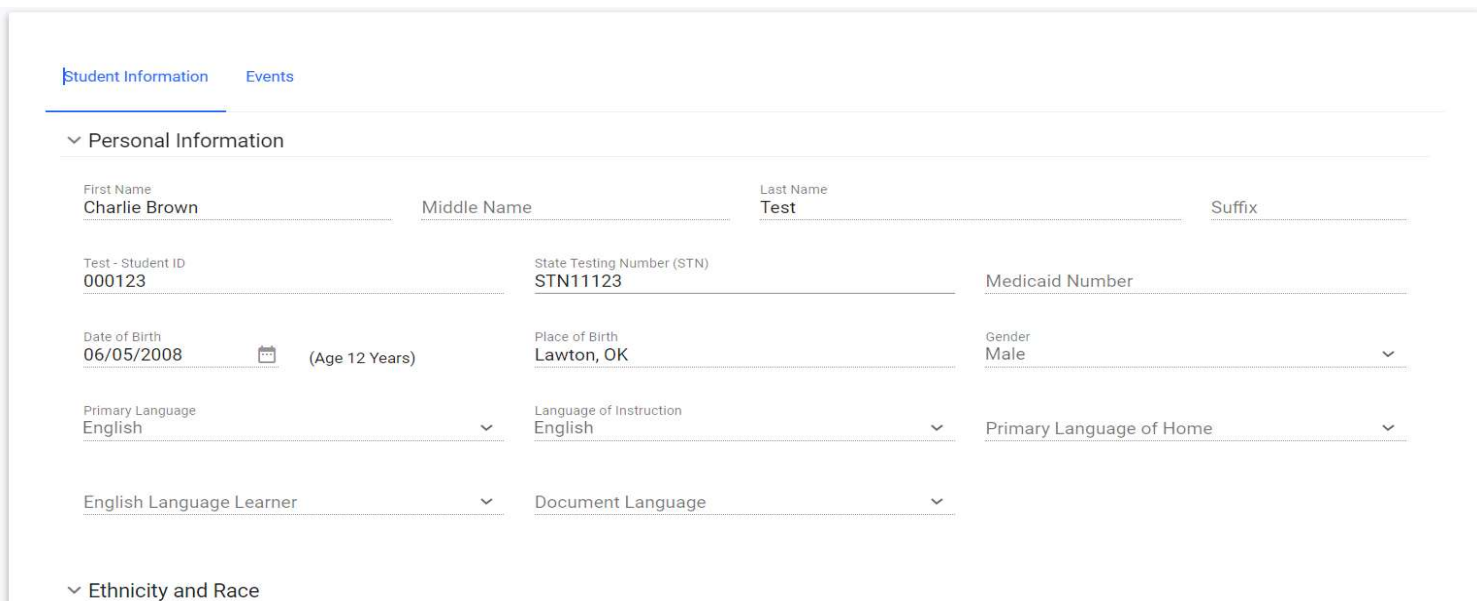
OK esUII Ref site & existing Student Data
STUDENTS / CONTACT LOG

Charlie Brown Test

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.



Student Information Events

Personal Information

First Name: Charlie Brown Middle Name: Last Name: Test Suffix:

Test - Student ID: 000123 State Testing Number (STN): STN11123 Medicaid Number:

Date of Birth: 06/05/2008 (Age 12 Years) Place of Birth: Lawton, OK Gender: Male

Primary Language: English Language of Instruction: English Primary Language of Home:

English Language Learner: Document Language:

Ethnicity and Race

Parents/Team

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

Parent/Guardian
VIEW PARENT ACTIONS
ADD NEW PARENT/GUARDIAN
ASSOCIATE WITH EXISTING PARENT/GUARDIAN

Position	Name	Relationship	Guardian Responsibility	Home Phone	Work Phone	Cell Phone	Details	Delete
★	▼ Sally and Ted Brown	Both Parents	Yes	5552347762				
	▼ Friend Test	Friend	No	555-555-5555				
	▼ Grandma Brown	Grandmother	No	555-555-5555				

SAVE

IEP Team
SELECT IEP TEAM

Special Education

BehaviorPlus

Teacher of Record TESET
 Test, Jeni ▼

Name	Relationship
Sally and Ted Brown	Both Parents

SAVE

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.

Contacts
PRINT CONTACTS
EXPORT CONTACTS
ADD A CONTACT

Active Contacts
Inactive Contacts

Del	Contact With	Contacting Person	Person Contacted	Contact Method	Contact Date	Contact Result	Document	Details
<input type="checkbox"/>	Parent	Stephanie	Sally and Ted Brown	Letter	05/05/2015	Conversation with parent		
<input type="checkbox"/>	Parent	Stephanie Test	Sally and Ted Brown	Phone Call	07/30/2015	Conversation with parent		
<input type="checkbox"/>	Other	Stephanie Test	Chelsea Test	Email	07/29/2015	Received Email		









SAVE

CREATE INVITATION DOCUMENT

Eligibility Process

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

























Eligibility Process

 Review of Existing Data (RED)	 Evaluations	 Eligibility Determination	 Print/View Documents
Complete 	Incomplete 	Complete 	In Progress 

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.

IEP Process

 IEP Purpose, Dates and Team	 Current Assessments	 Strengths/Needs, Special Factors, and Parent Concerns	 Goals and Objectives	 Accommodations	 Services
Complete 	Incomplete 	Complete 	Incomplete 	Complete 	Complete 
 OK Alternate Assessments	 Early Childhood Data Collection	 Transition Services Plan	 Create Draft/Final IEP	 Do Not use	 Print/View Documents
In Progress 	In Progress 	In Progress 	In Progress 	Incomplete 	In Progress 

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.

Documents:

General

Behavior

FFS

- Special Education Parent Consent
- Descriptions of Evaluation Procedures
- IEP At-a-Glance
- Child Outcomes Summary Form
- Student Summary of Performance
- OK - Meeting Invitation
- Written Notice to Parents
- Comment Form
- ESY Determination
- Consent for Release of Information
- Vocational Rehab Referral Letter
- Contact Log
- Progress Report
- ESY-at-a-glance
- Progress Monitoring Graph Document
- Progress Track - Blank Grid
- Progress Monitoring Student Summary Document
- Student Intervention Plan
- MTSS Download Spreadsheet
- Pre Referral
- Screenings
- 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	<input type="checkbox"/>	<input type="checkbox"/>
6444	12/11/2020	Gary Scott	MTSS Student History	PDF	<input type="checkbox"/>	<input type="checkbox"/>
5512	10/23/2019	Jill Burroughs	IEP Addendum	PDF	<input type="checkbox"/>	Accepted VIEW
5481	10/20/2019	Jill Burroughs	IEP Addendum	PDF	<input type="checkbox"/>	Accepted VIEW
5043	08/13/2019	Jill Burroughs	OK IEP	PDF	<input type="checkbox"/>	Accepted VIEW
4743	05/01/2019	Jill Burroughs	OK Eligibility - MEEGS	PDF	<input type="checkbox"/>	Accepted VIEW
4741	05/01/2019	Jill Burroughs	OK Eligibility - RED	PDF	<input type="checkbox"/>	<input type="checkbox"/>
4168	08/21/2018	Jill Burroughs	OK Eligibility - RED	PDF	<input type="checkbox"/>	<input type="checkbox"/>
3856	07/03/2018	Jill Burroughs	OK Eligibility - RED	PDF	<input type="checkbox"/>	<input type="checkbox"/>
3840	06/18/2018		OK IEP	PDF	<input type="checkbox"/>	Accepted VIEW
3839	09/23/2015		Progress Report (2015-2016 - Reporting Period 4)	PDF	<input type="checkbox"/>	<input type="checkbox"/>
3838	09/16/2015		OK Eligibility - RED	PDF	<input type="checkbox"/>	<input type="checkbox"/>
3837	08/28/2015		OK IEP	PDF	<input type="checkbox"/>	Accepted VIEW
3836	08/04/2015		Special Education Parent Consent	PDF	<input type="checkbox"/>	<input type="checkbox"/>

Student History

Displays the Event History for the student.

Student Information ✓

Name Charlie Brown Test	Code 000123	Date of Birth 06/05/2008
School Sample2 School	School Code SS2	Grade Level 3rd Grade

Event History VIEW USER ACTIONS VIEW PARENT ACTIONS

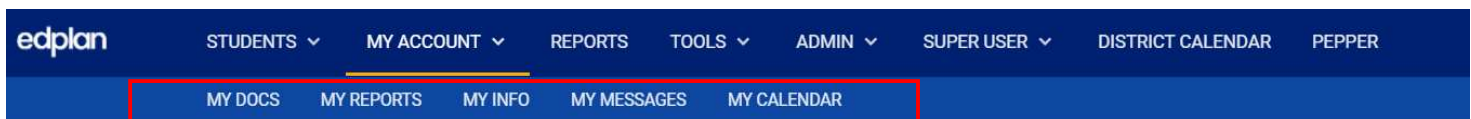
Domain: Year: Date Type: Event Type:

Active Inactive

Event ID	Event Date	Event Type (transferred from)	Disability	Begin Date	End Date	User	Document	Date Created	Details
1257	06/05/2015	Eligibility Determination	(okffareference)	AUT	06/05/2015	06/05/2018	Transfer / Import OK Eligibility - MEEGS (ID# 3829)	07/28/2015 00:02 (2081 days)	
1258	07/31/2015	IEP	(okffareference)	AUT	07/31/2015	07/31/2016	Transfer / Import OK IEP (ID# 3837)	08/28/2015 16:13 (2050 days)	
1260	09/23/2015	Progress Report (2015 - Reporting Period 4)	(okffareference)	AUT			Transfer / Import Progress Report (ID# 3839)	09/23/2015 09:14 (2024 days)	
1259	08/01/2015	Parent Consent	(okffareference)	AUT			Transfer / Import Special Education Parent Consent (ID# 3836)	08/04/2015 17:10 (2074 days)	
1261	07/31/2017	IEP	(okffareference)	AUT	07/31/2017	07/31/2018	Transfer / Import OK IEP (ID# 3840)	06/18/2018 16:13 (1025 days)	
1262	03/12/2018	Transfer Student (okffareference => okaggregateiep)	(okffareference)	AUT			Jill Burroughs	06/18/2018 22:04 (1025 days)	
1538	02/20/2019	School Change (Sample2 School)	(okffareference)	AUT	02/20/2019		Jill Burroughs	02/20/2019 16:10 (778 days)	
1539	02/20/2019	Grade Change (3rd Grade)	(okffareference)	AUT	02/20/2019		Jill Burroughs	02/20/2019 16:10 (778 days)	
★ 1603	05/01/2019	Eligibility Determination	(okffareference)	AUT	05/01/2019	05/01/2022	Jill Burroughs OK Eligibility - MEEGS (ID# 4743)	05/01/2019 15:37 (708 days)	

My Account

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



The screenshot shows the EdPlan navigation bar with the following items: edplan, STUDENTS, MY ACCOUNT (highlighted), REPORTS, TOOLS, ADMIN, SUPER USER, DISTRICT CALENDAR, PEPPER. Below the main bar, a sub-menu is visible with the following items: MY DOCS, MY REPORTS, MY INFO, MY MESSAGES, MY CALENDAR. The sub-menu items are highlighted with a red box.

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.

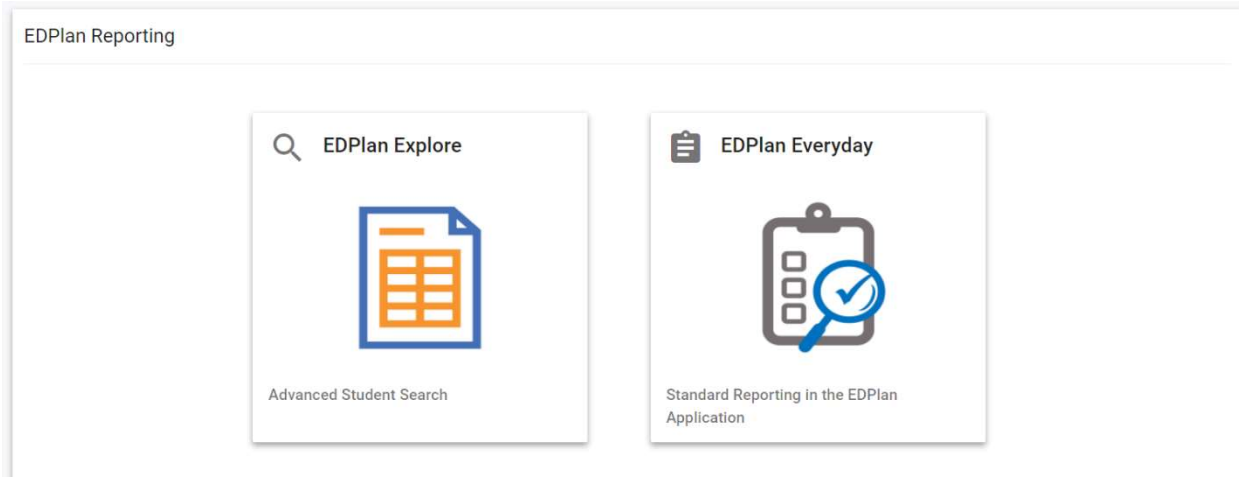
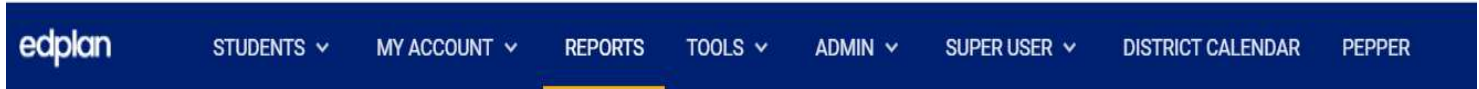
'MY INFO' -- This page is where the end-user can update Password Information, Name, Title, Email Address, Phone, Etc.

'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.

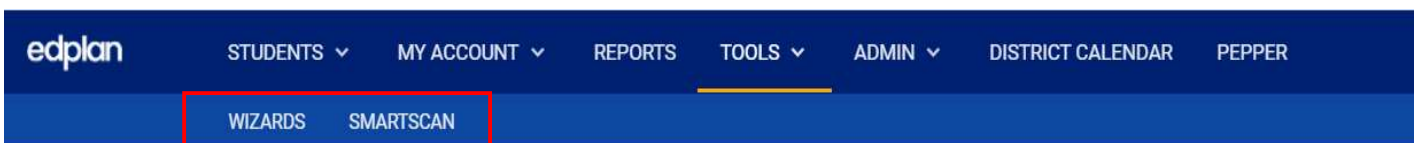


By clicking on the **'EDPlan Explore'** tile, also known as 'Advanced Student Search', the student search can be expanded by filtering by Status, Programs, Compliance, Disabilities, Related Services, Special Ed Services, etc.

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.

File must be TIF or PDF
No file may be greater than **1000.00 MB** in size.

File	
Choose File	No file chosen
Choose File	No file chosen
Choose File	No file chosen
Choose File	No file chosen
Choose File	No file chosen

UPLOAD FILE(S)

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.

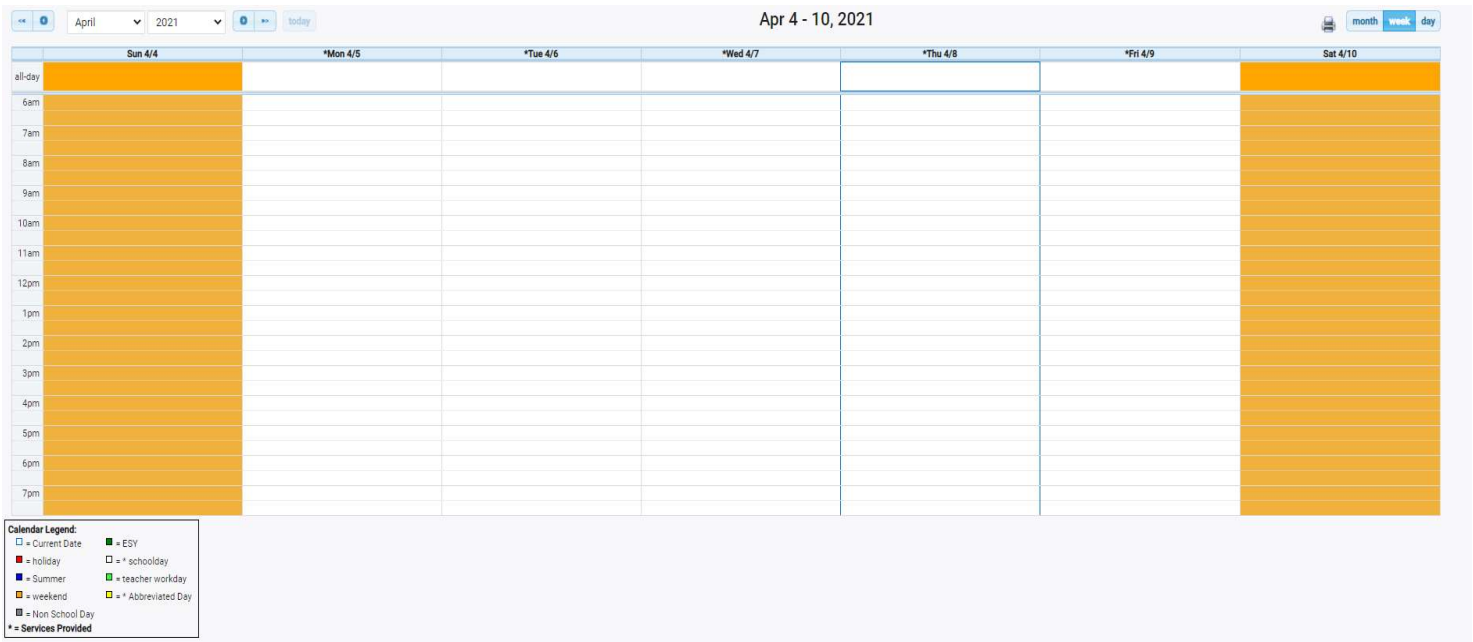
'**SCHOOLS**' – This page displays School Site information for school site(s) and external School(s). Information includes Site Calendars, Compliance, School Name, Site Abbreviations, Site Codes, Address, Phone/Fax numbers, etc.

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)



Calendar Legend:

- = Current Date
- = holiday
- = Summer
- = weekend
- = Non School Day
- * = Services Provided
- = ESY
- = school day
- = teacher workday
- = Abbreviated Day

Pepper

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



edplan STUDENTS ▾ MY ACCOUNT ▾ REPORTS TOOLS ▾ ADMIN ▾ DISTRICT CALENDAR PEPPER