

EDPlan™ Connect

A District Guide for using the EDPlan™ parent portal.



PUBLIC
CONSULTING GROUP

EDPLAN™ CONNECT PARENT PORTAL

The EDPlan Connect parent portal will allow the student’s parent or guardian to virtually access their child’s IEP or 504 Plan documents, service information, and teacher of record information. This guide provides an overview of EDPlan Connect.

As EDPlan District Administrator, there are a few steps to set up EDPlan Connect.

1. Enter a phone number in the Caller ID field for each school site in your district. This step must be done in order for an activation code to be sent to a parent.

First, access the Schools tab by clicking on ‘Administrator.’



Select the school site, then enter the Caller ID number. If there is no phone number in the Phone Number field, enter the same number in the Phone Number field, then Update the Database.

Edit School Information

School Name:	North Side
Abbreviation:	SS2
	<input type="checkbox"/> External School
School Code:	1552
Type of School:	Elementary School ▼
Length of School Week:	30.00 hour(s) ▼
Address:	1255 n North
City, State, ZipCode:	Okc OK 74887
Phone Number:	582-987-8852
Fax Number:	
Caller ID:	
E-Mail Address:	

A red arrow points to the empty 'Caller ID' field.

- The contact information for the Teacher of Record will be displayed in EDPlan Connect. Verify that any staff who may be a Teacher of Record has a title, work phone number, and valid email address.

Access the User tab by clicking Administrator, then Users.



On the individual user's page, check Title, Work Phone, and E-Mail Address. Add this information if needed, then click Update the Database.

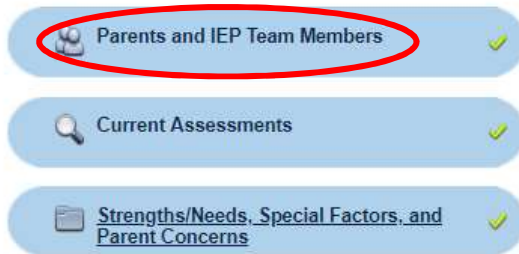
Title:	<input type="text" value="Special Education Teacher"/>
Address:	<input type="text"/>
City, State, ZipCode:	<input type="text"/> <input type="text"/> <input type="text"/>
Home Phone:	<input type="text"/> <input type="text"/> <input type="text"/>
Work Phone:	<input type="text"/> <input type="text"/> <input type="text"/>
Receives Compliance Phone Alerts:	<input type="checkbox"/>
E-Mail Address:	<input type="text"/>

If entered in EDPlan, the teacher of record's address will display in EDPlan Connect. Either enter the address for the teacher's building, or leave the address blank. Do not enter the teacher's home address.

Address:	<input type="text"/>
City, State, Zip Code:	<input type="text"/> <input type="text"/> <input type="text"/>

- Verify that the parent has a valid cell phone number and a valid email address. Select the IEP Process page, then select Parents and IEP Team Members.

IEP Process



- Parents and IEP Team Members ✓
- Current Assessments ✓
- Strengths/Needs, Special Factors, and Parent Concerns ✓

Click Add/Edit Parent/Guardian/Other Details.

Parent(s) / Guardian(s) / Others									
Del	Pos	Name	Relation	Home Ph	Work Ph	Cell Ph	Student Lives Here	Guardian Responsibility	Include On IEP Team
<input type="checkbox"/>	<input type="checkbox"/>	Roberta Test	Mother, natural/adoptive			4059236470	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Add/Edit Parent/Guardian/Other Details									

Click the arrow to expand the parent/guardian information.

Add/Edit Parent/Guardian

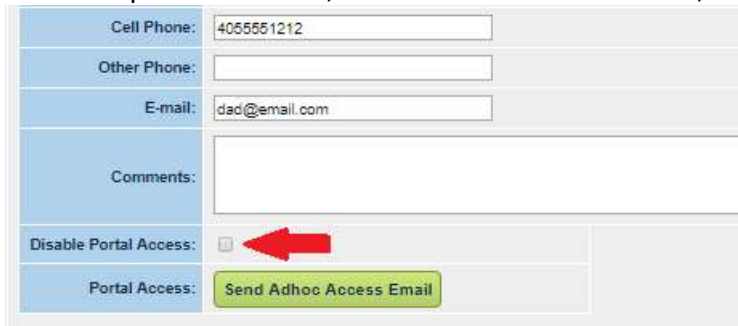
Edit Existing Parent/Guardian/Other Data				
Del	Pos	New Pos	Expand	Full Name
<input type="checkbox"/>		<input type="checkbox"/>	<input type="button" value="▶"/>	Roberta Test

Verify that the parent has a valid 10 digit phone number in at least one of the phone number fields, in one of these formats: xxxxxxxxxx, (xxx)xxx-xxxx, or xxx-xxx-xxxx. A cell number is encouraged, as the parent will be able to authenticate using a text message. Verify that there is an email address for the parent. You may edit parent information in EDPlan.

Home Phone:	<input type="text" value="4055551212"/>
Home Fax:	<input type="text"/>
Work Phone:	<input type="text" value="4055214343"/>
Work Fax:	<input type="text"/>
Cell Phone:	<input type="text" value="4059925432"/>
Other Phone:	<input type="text"/>
E-mail:	<input type="text" value="dad@email.com"/>

There may be times when a parent/guardian should not have access to the child's records in EDPlan Connect. In this case, access can be disabled.

To disable the parent's access, check **Disable Portal Access**, and either **Save**, or **Save and Continue**.



Cell Phone: 4055551212
 Other Phone:
 E-mail: dad@email.com
 Comments:
 Disable Portal Access: 
 Portal Access: [Send Adhoc Access Email](#)

Any 'parent' with 'Guardian' checked will receive an email overnight when the following documents are finalized:

- IEP
- IEP Addendum
- Meeting Invitation
- Written Notice to Parents
- Progress Report
- 504 Student Plan
- 504 Invitation to Meeting
- 504 Written Notice

Multiple parents/guardians can receive alerts, check the 'guardian' checkbox for any parent/guardian who wishes to be alerted.

Parent(s) / Guardian(s) / Others								
Del	Pos	Name	Relation	Home Ph	Work Ph	Cell Ph	Student Lives Here	Guardian Responsibility
<input type="checkbox"/>	<input type="checkbox"/>	Sally and Ted Brown	Both Parents	5552347782			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Friend Test	Friend	555-555-5555			<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Grandma Brown	Grandmother	555-555-5555			<input type="checkbox"/>	<input checked="" type="checkbox"/>

You can also send a 'generic' email to the parent welcoming them to the system and providing a link to EDPlan Connect. Click 'Send Adhoc Access Email' to send the generic welcome email to a parent.

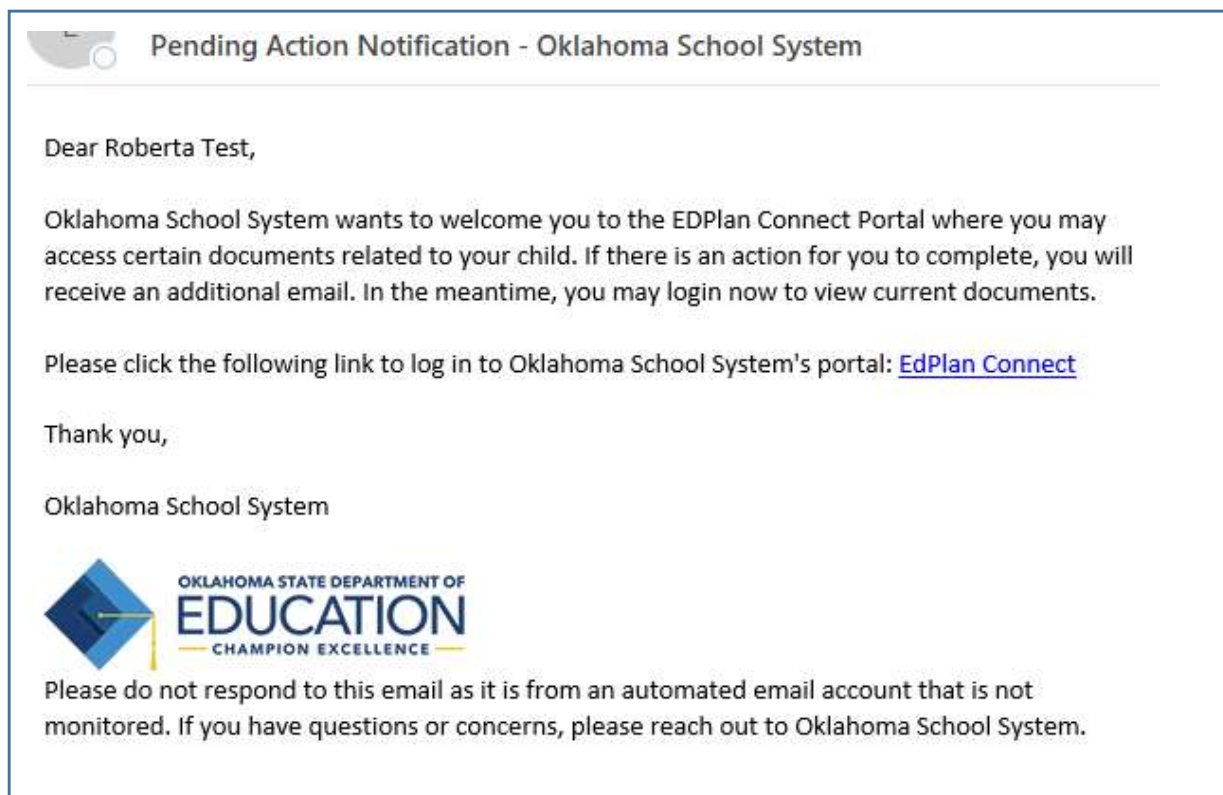


Cell Phone: 4055551212
 Other Phone:
 E-mail: dad@email.com
 Comments:
 Disable Portal Access:
 Portal Access: [Send Adhoc Access Email](#) 

How Parents Will Access the Parent Portal

Once a finalized document (see the list of documents below) has been created for a child, the parent will be sent an email notification with a link that allows them to access the EDPlan Connect portal. The parent can access the EDPlan Connect Portal anytime by keeping or bookmarking the access link. The parent can access the EDPlan Connect Portal by following the steps below:

1. Locate the notification in the email inbox, which the parent will receive around midnight the day after the document is finalized. This notification will be sent to the email address the school has on file. The email will look similar to the picture below.



2. After clicking on the link, the parent will be taken to the EDPlan Connect portal to authenticate their identity by requesting an access code, per Family Education Rights and Privacy Act (FERPA) requirements. The parent can choose to receive the code either by text message, voice call or email. Text or voice call is strongly encouraged, as these options are more secure. The Login page will look similar to the picture below.



The screenshot shows the 'EdPlan by PCG Education' logo at the top. Below it, the page is titled 'EasyIEP Connect' and 'Oklahoma School System'. On the left is the Oklahoma State Department of Education logo. The main content area asks 'How would you like to receive access code?' with three radio button options: 'Text Message' (selected), 'Voice Call', and 'E-Mail'. Below this is a section for 'Select the phone number you wish to use:' with a radio button and the placeholder '###-###-6470'. At the bottom left is a green 'Request Access Code' button.

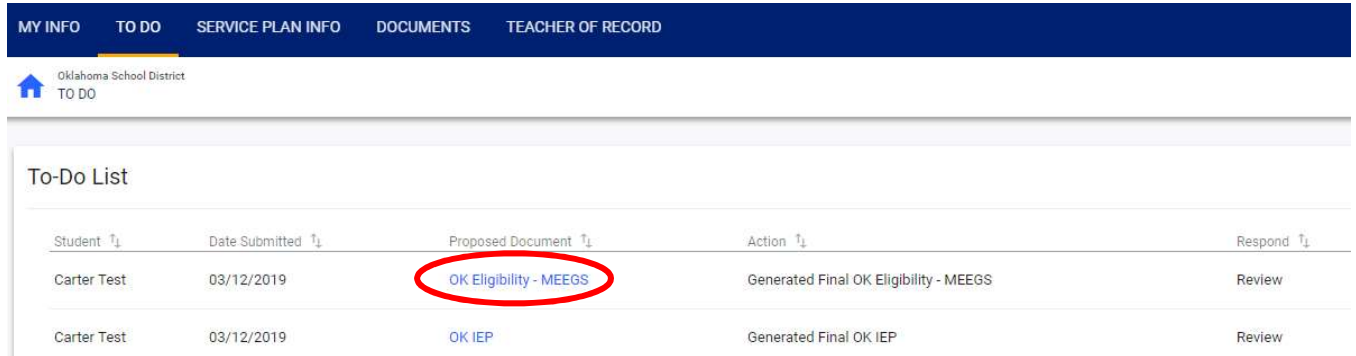
After the parent selects how they want to receive the access code, they will click 'Request Access Code' button (the button in the screen shot above) and allow for 1-2 minutes to receive the access code via the chosen method (for example, they will receive a text if 'Text Message' was selected above).






3. Once the code is received, the parent will enter it in the 'Enter Access Code' field and select 'Login.'



The screenshot shows the 'EdPlan by PCG Education' logo at the top. Below it, the page is titled 'EasyIEP Connect' and 'Oklahoma School System'. On the left is the Oklahoma State Department of Education logo. The main content area says 'You will have 15 minutes to use your access code.' Below this is a text input field labeled 'Enter Access Code:'. At the bottom right is a green 'Login' button with a red arrow pointing to it.

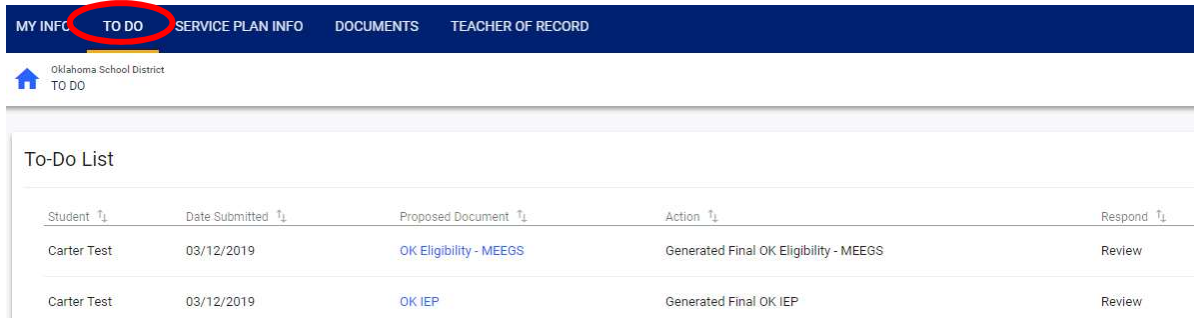
- Once the parent has logged into the site, they will be directed to the To-Do List where new documents for review will be displayed (newly finalized documents). Click on the document name to open it in PDF format.



Student 	Date Submitted 	Proposed Document 	Action 	Respond 
Carter Test	03/12/2019	OK Eligibility - MEEGS	Generated Final OK Eligibility - MEEGS	Review
Carter Test	03/12/2019	OK IEP	Generated Final OK IEP	Review

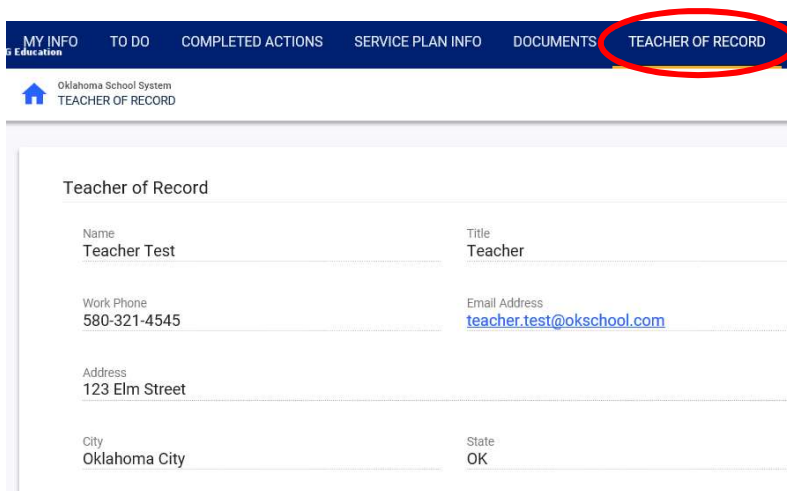
EDPlan™ Connect General Navigation

- **To Do List:** When a parent logs in to EDPlan™ Connect, the landing page is the To Do List. Documents that have recently been finalized will display in this list, as seen below.



Student	Date Submitted	Proposed Document	Action	Respond
Carter Test	03/12/2019	OK Eligibility - MEEGS	Generated Final OK Eligibility - MEEGS	Review
Carter Test	03/12/2019	OK IEP	Generated Final OK IEP	Review

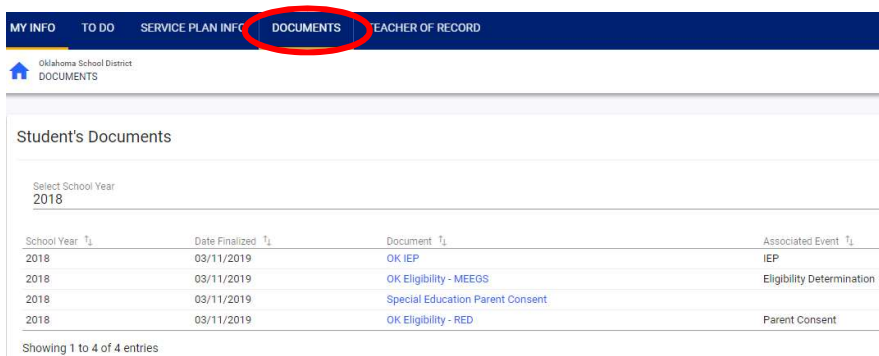
- **Teacher of Record:** The parent can review the district contact listed for their student under the Teacher of Record link, as seen below.



Teacher of Record

Name	Teacher Test	Title	Teacher
Work Phone	580-321-4545	Email Address	teacher.test@okschool.com
Address	123 Elm Street		
City	Oklahoma City	State	OK

- **Documents:** While logged in, the parent will be able to review any documents associated with their child and their EDPlan™ Connect account by clicking on the Documents link. The parent may click on the document name (blue link) to open that document, as seen below.



Student's Documents

Select School Year
2018

School Year	Date Finalized	Document	Associated Event
2018	03/11/2019	OK IEP	IEP
2018	03/11/2019	OK Eligibility - MEEGS	Eligibility Determination
2018	03/11/2019	Special Education Parent Consent	
2018	03/11/2019	OK Eligibility - RED	Parent Consent

Showing 1 to 4 of 4 entries

➤ Below is a screen shot of what an opened IEP document looks like:



University Site OK EdPlan Example
2500 N Lincoln Blvd. OKC, OK 73105

INDIVIDUALIZED EDUCATION PROGRAM (IEP)			
From: 03/01/2019	To: 03/01/2020	<input checked="" type="checkbox"/> Initial	<input type="checkbox"/> Subsequent <input type="checkbox"/> Interim <input type="checkbox"/> Addendum
Name of Student: Jenn Test	Grade: 4th Grade	State Testing Number (STN): STNSAMPLE3	
Birthdate: 09/05/2009		Age: 9 Years 6 Months	
Parents: Roberta Test	(Home)	(Cell) 4059236470	
Phone: (Work)	District/Agency: #1		
Home Address: 999 Main Street Ardmore, OK 99999	Site Code: SAMP	IEP Teacher of Record: Ginger L. Elliott-Teague	
School Site: Sample School			
OVERALL OBJECTIVE STATEMENTS			
<p>Document current evaluation data and write objective statements, (may include most recent statewide and districtwide assessments) to demonstrate how the child's disability affects the child's involvement, functional performance, and progress in the general education curriculum and postsecondary transition, as appropriate. For students of transition age, document transition assessment results as they relate to the postsecondary goal(s). For preschool children, describe how the disability affects the child's participation in age appropriate activities.</p>			

When are the alerts sent?

Alerts are sent to parents/guardians the night after specific documents are finalized (see list below).

Who receives the alerts?

Any parent on the Parents and IEP Team page who has 'Guardian' checked will receive alerts.

Which documents can be viewed in the parent portal?

Special Education Documents to Display in Connect:

- Parent Consent
- Description of Eval 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 Rehabilitation Referral
- Progress Report
- ESY at a Glance
- OK Eligibility RED
- OK Eligibility MEEGS
- OK Eligibility Termination MEEGS
- OK Eligibility Short Term MEEGS

504 Documents to Display in Connect:

- 504 Eligibility Report (Not Eligible)
- 504 Eligibility Report (Eligibility Termination)
- 504 Eligibility Report (Services through IEP)
- 504 Eligibility Report (No Service Plan)
- 504 Eligibility Termination Report (Services through IEP)
- 504 Eligibility Termination Report (No Service Plan)
- 504 Eligibility Report (Eligible)
- 504 Student Plan
- 504 Invitation to Meeting
- 504 Written Notice
- 504 Red
- 504 Parent Consent

Which documents will alert parents to 'review?'

SPED Documents Alert on Final:

- OK IEP
- IEP Addendum
- OK Meeting Invitation
- Written Notice to Parents
- Progress Report

504 Documents Alert on Final:

- 504 Student Plan
- 504 Invitation to Meeting
- 504 Written Notice



Solutions that Matter