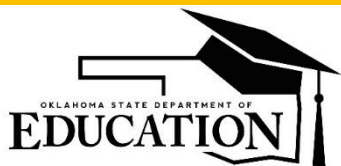




# OK EdPlan™

## Eligibility Manual

August 2016



PCG | *Education*

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## OK EdPlan™ - Eligibility Manual

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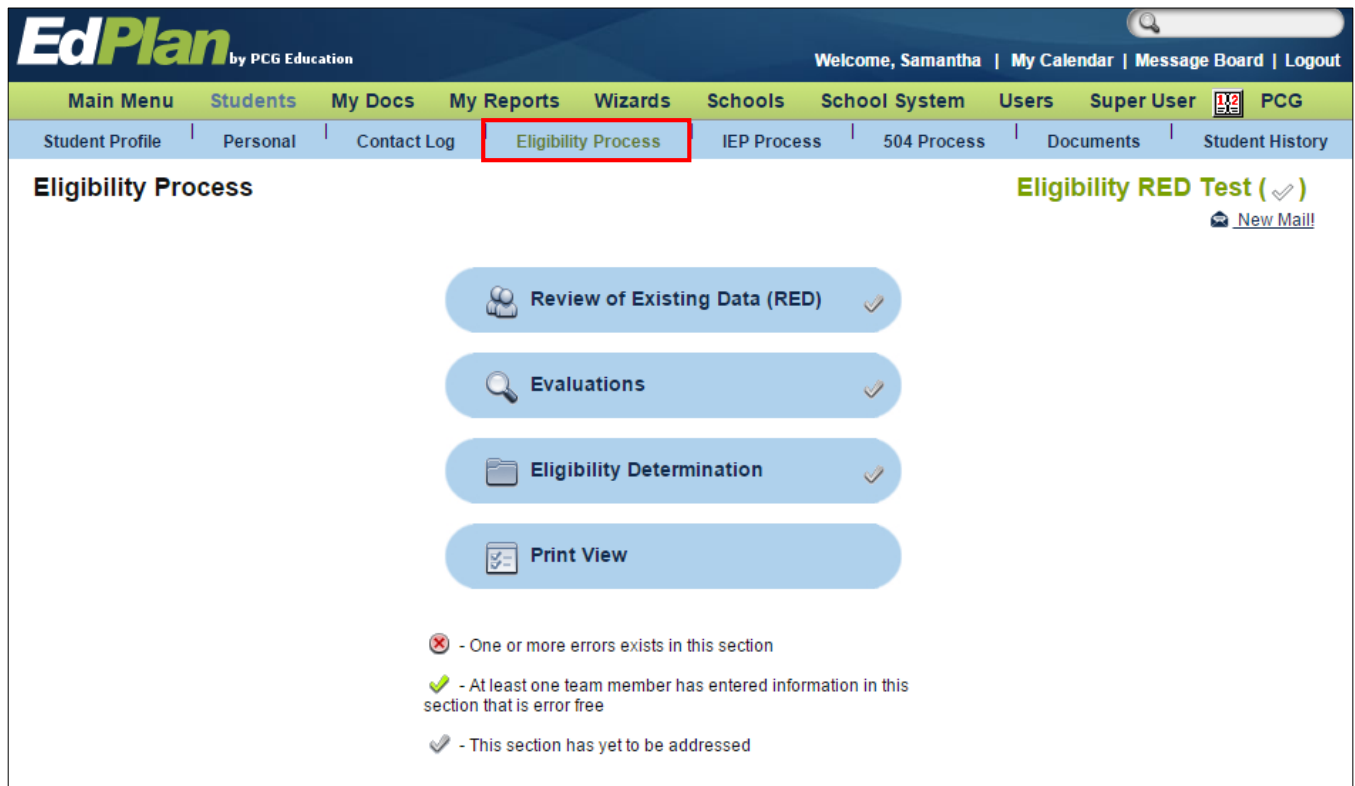
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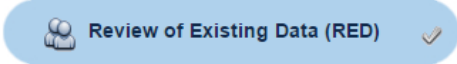
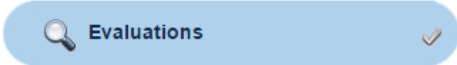
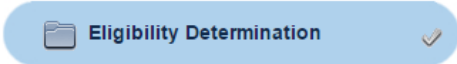

### ELIGIBILITY PROCESS

Select the 'Eligibility Process' tab to begin the development of the student's Review of Existing Data (RED) and evaluation information. Each button within the "Eligibility Process" is integral to the entire process. Green check marks designate when pages have been completed and are error free, while 'x's' designate an error or missing information on a page.



The screenshot shows the EdPlan interface for the Eligibility Process. The top navigation bar includes 'Main Menu', 'Students', 'My Docs', 'My Reports', 'Wizards', 'Schools', 'School System', 'Users', 'Super User', and 'PCG'. The 'Eligibility Process' tab is highlighted with a red box. Below the navigation, the 'Eligibility Process' section is displayed, featuring four buttons: 'Review of Existing Data (RED)', 'Evaluations', 'Eligibility Determination', and 'Print View'. Each button has a green checkmark icon on the right side, indicating completion. A legend at the bottom explains the icons: a red 'x' for errors, a green checkmark for error-free completion, and a grey checkmark for sections yet to be addressed.

**Eligibility Process** **Eligibility RED Test (✓)**  
[New Mail!](#)

-  Review of Existing Data (RED) ✓
-  Evaluations ✓
-  Eligibility Determination ✓
-  Print View ✓

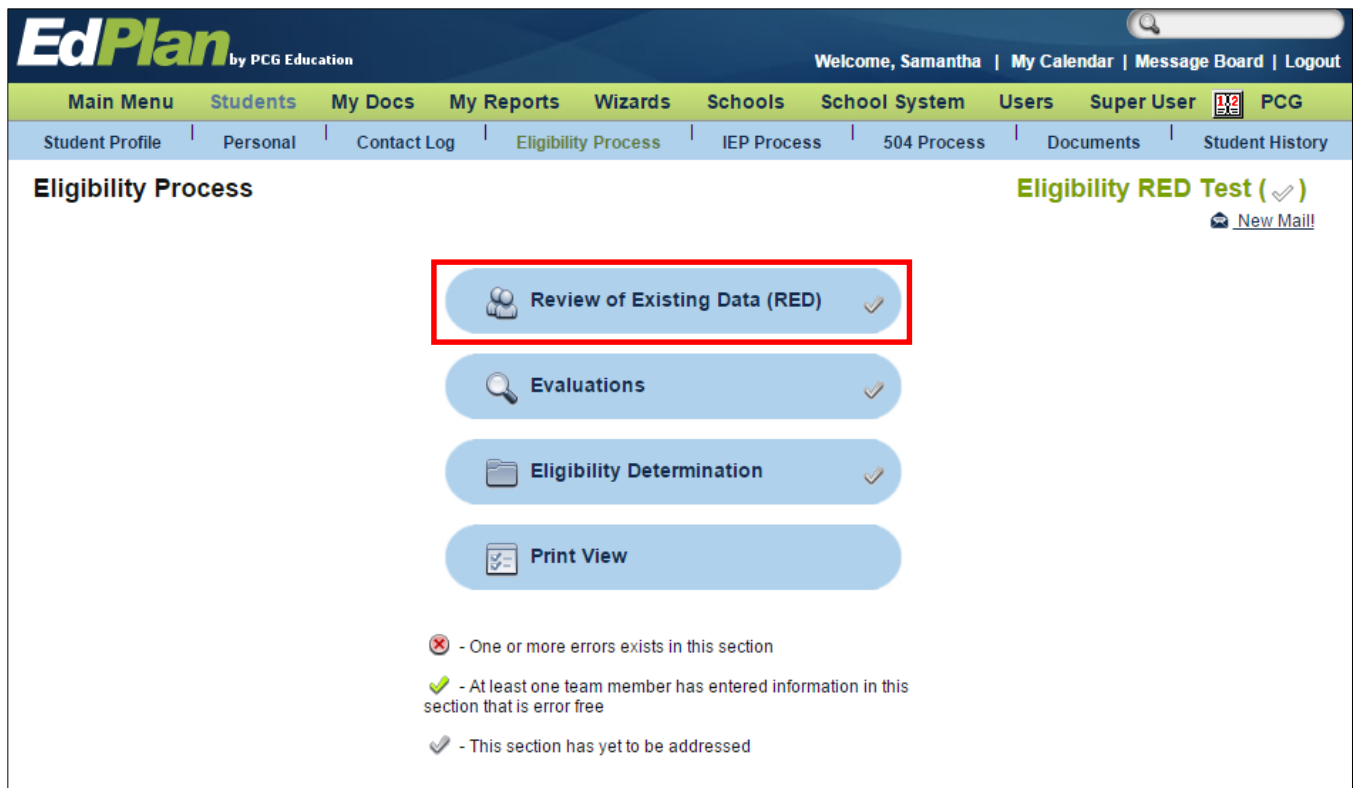
✘ - One or more errors exists in this section  
✔ - At least one team member has entered information in this section that is error free  
✔ - This section has yet to be addressed

## OK EdPlan™ - Eligibility Manual

### Review of Existing Data (RED)

1. From the Eligibility Process tab, click on the 'Review of Existing Data (RED)' page (highlighted below). The Review of Existing Data should be used in *ANY* of the following situations:
  - a. Student is being initially considered for special education,
  - b. Student is due for their three-year re-evaluation,
  - c. Student is being considered for other or additional disability categories,
  - d. Student has moved to Oklahoma from another state with a special education eligibility determination,
  - e. Student is considered for a Functional Behavior Assessment, or
  - f. Parent request.

**NOTE:** If you have received a *TRANSFER STUDENT* from within Oklahoma that does not have their current Eligibility event in OK EdPlan™, you do not have to complete the RED page and can move straight to the 'Eligibility Determination' page in the Eligibility Process.



The screenshot displays the EdPlan web interface. At the top, the EdPlan logo is on the left, and the user's name 'Welcome, Samantha' along with navigation links for 'My Calendar', 'Message Board', and 'Logout' are on the right. Below this is a main navigation bar with tabs for 'Main Menu', 'Students', 'My Docs', 'My Reports', 'Wizards', 'Schools', 'School System', 'Users', 'Super User', and 'PCG'. A secondary navigation bar shows 'Student Profile', 'Personal', 'Contact Log', 'Eligibility Process', 'IEP Process', '504 Process', 'Documents', and 'Student History'. The 'Eligibility Process' section is active, showing a list of options: 'Review of Existing Data (RED)', 'Evaluations', 'Eligibility Determination', and 'Print View'. The 'Review of Existing Data (RED)' option is highlighted with a red box. To the right of this list, there is a status indicator 'Eligibility RED Test (✓)' and a 'New Mail!' notification. At the bottom of the page, there are three error messages: a red 'X' icon indicating one or more errors exist, a green checkmark icon indicating at least one team member has entered information in this section that is error free, and a grey checkmark icon indicating this section has yet to be addressed.

## OK EdPlan™ - Eligibility Manual

- Enter or use the calendar function to select the 'Date of Review of Existing Data meeting'. This is the date that the district discusses and reviews the student's existing data.

**Review of Existing Data (RED)**
**Eligibility RED Test**  
New Mail!

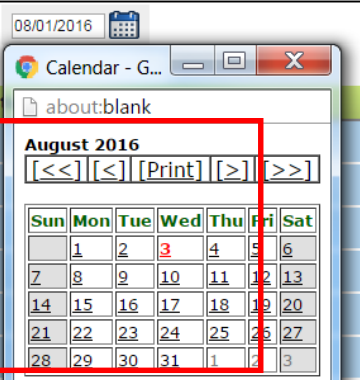
Date of Review of Existing Data meeting

- Click on the calendar symbol to choose the date of the meeting or enter the date directly in the field.

Date of Review of Existing Data meeting
08/01/2016

**SPECIFY PRESENTING CONCERNS: (check all that apply to the current concerns for this student)**

<input checked="" type="checkbox"/>	Child is working below grade level in one or more basic skills
<input type="checkbox"/>	Child's behavior is inconsistent with that expected of students' age
<input type="checkbox"/>	Child has a rate of progress which has: <input type="radio"/> Increased <input type="radio"/> Decreased
<input type="checkbox"/>	Child's speech/language skills are inconsistent with those expected for children of student's age
<input type="checkbox"/>	Child has entered our school system with an out of date and/or incomplete evaluation
<input type="checkbox"/>	Parent preschool referral



- Complete the 'Specify Presenting Concerns' section pertaining to the students, current concerns, and progress compared to that of other students of the same age and expected behaviors and skills. Select all that apply to this review.

**NOTE:** When users select 'Child is due for the reevaluation' this will automatically drive the remaining page and will pre-fill some of the selections.

- Selecting 'Other' will require the user to type in the comment box to highlight any other presenting concerns.

**SPECIFY PRESENTING CONCERNS: (check all that apply to the current concerns for this student)**

<input type="checkbox"/>	Child is working below grade level in one or more basic skills
<input type="checkbox"/>	Child's behavior is inconsistent with that expected of students' age
<input type="checkbox"/>	Child has a rate of progress which has: <input type="radio"/> Increased <input type="radio"/> Decreased
<input type="checkbox"/>	Child's speech/language skills are inconsistent with those expected for children of student's age
<input type="checkbox"/>	Child has entered our school system with an out of date and/or incomplete evaluation
<input type="checkbox"/>	Parent preschool referral
<input type="checkbox"/>	Child is due for the reevaluation
<input type="checkbox"/>	Child has enrolled in our district with Eligibility from outside Oklahoma
<input checked="" type="checkbox"/>	Other Presenting Concerns: <div style="border: 1px solid gray; height: 20px; width: 100%; margin-top: 5px;"></div>

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- If Grade Level and Rate of Progress are selected the additional indicators must be specified. These additional indicators can not be selected unless Grade Level and/or Rate of Progress are selected.

Child has a rate of progress which has:  Increased  Decreased

4. Select the Purpose of the data review:

- Indicate whether the data review is for an Initial, Reevaluation, Out of State Transfer, or Functional Behavior determination.

This data review is for:

Initial  
 Reevaluation  
 Out of State Transfer  
 Functional Behavior

**NOTE:** User selection will dynamically change the remainder of the page and the required fields for completion

5. The 'Background Information' pertains to the child's language and evaluation history, providing a baseline of what grades have been repeated and if any previous evaluations have taken place.

**NOTE:** This section of information is required for 'Initial', 'Reevaluation', and 'Functional Behavior' data review types. If the user selects the 'Out of State Transfer' data review, this section will be hidden and will not be required.

**Background Information: Please enter all known information about this student.**

Native Language/Mode of Communication: English

Primary Language of Home:

Number of Schools Previously Attended: None

List Grade(s) Repeated:  None  Pre-K  K  1  2  
 3  4  5  6  7  
 8  9  10  11  12

Remedial/Other School Services:

Previous Individualized Evaluation(s)/Date(s):

Testing results: [Text Field] [abc] [Date: 09/15/2015]

[Text Field] [abc] [Date: ]

[Text Field] [abc] [Date: ]

[Add Assessments](#)

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- The **‘Native Language/Mode of Communication’** and the **‘Primary Language of Home’** will prepopulate from the ‘Personal Page’ of the student and cannot be edited from this page. This information will come from the WAVE import; however, at this time the Personal Page is open for EdPlan™ Administrators to edit if that import fails.
- **‘Number of Schools Previously Attended’** is a drop down that will allow users to indicate (if known) how many schools, if any, that have been attended prior to this data review.
- **‘List Grade(s) Repeated’** is a multi-select option, allowing the user to check as many grades as appropriate for the particular student.
- **‘Remedial/Other School Services’** is a text field that will allow users to enter any information about other services that are or have been provided to the student.
- Information related to **‘Previous Individualized Evaluation(s)/Date(s)’** can be entered with text boxes and corresponding dates. If there are more than 3, click on the **Add Assessments** button to add additional evaluation and date fields.

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6. The **‘Evaluation Data’** section will allow users select information that has been added on the **‘Evaluations’** tab to include on the Review of Existing Data (RED) document when it prints in Draft and Final Form.

**NOTE:** When the review is for the Re-evaluation process, all evaluation information that has been entered in the EdPlan™ system will be available for inclusion. If this is an initial referral, users can elect whether to enter the evaluations (if available) on the **‘Evaluations’** tab or above in the **‘Previous Individualized Evaluation(s)/Date(s)’**.

**Evaluation Data: Indicate which assessments you wish to include in the document.**

Inc on RED	Assessment Date	Method of Assessment	Assessment Category	Component Area	Scores Types	
		▼ Woodcock Johnson Test of Achievement, 4th Edition (WJ-IV ACH)				
<input type="checkbox"/>	09/02/2015	Woodcock Johnson Test of Achievement, 4th Edition (WJ-IV ACH)	Academics-Basic Reading Skills	Basic Reading Skills Reading Fluency	Standard Score	<a href="#">Details</a>
<input type="checkbox"/>	09/03/2015	Woodcock Johnson Test of Achievement, 4th Edition (WJ-IV ACH)	Academics-Reading Comprehension	Reading Comprehension Passage Comprehension	Standard Score	<a href="#">Details</a>
<input type="checkbox"/>	09/03/2015	Woodcock Johnson Test of Achievement, 4th Edition (WJ-IV ACH)	Academics-Reading	Letter-Word Identification	Standard Score	<a href="#">Details</a>

- By checking the box in the column **‘Inc on RED’** the user is indicating they want the data to print to the RED document in both Draft and Final form.

7. The **‘Vision and Hearing Evaluation Information’** section collects information about the student’s evaluations for vision and hearing. If ‘Yes’ is selected, please explain is required. Please note the vision and hearing information prints to the RED and Eligibility Determination (MEEGS) document.

**Vision and Hearing Evaluation Information**

Vision Information		Hearing Information	
Any Concerns Regarding the Student's Vision?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Any Concerns Regarding the Student's Hearing?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Explain:	<input type="text"/>	Explain:	<input type="text"/>
Date of Last Vision Test:	07/29/2016	Date of Last Hearing Test:	07/29/2016
Results or Findings:	<input type="text"/>		

8. The **‘Service History’** section collects information about the student’s current and former special education and other services.

**NOTE:** If “Reevaluation” is selected as the data review type, then the ‘Currently Receives Special Education Services’ section will pre-populate with the current special education Eligibility information from the student history page.



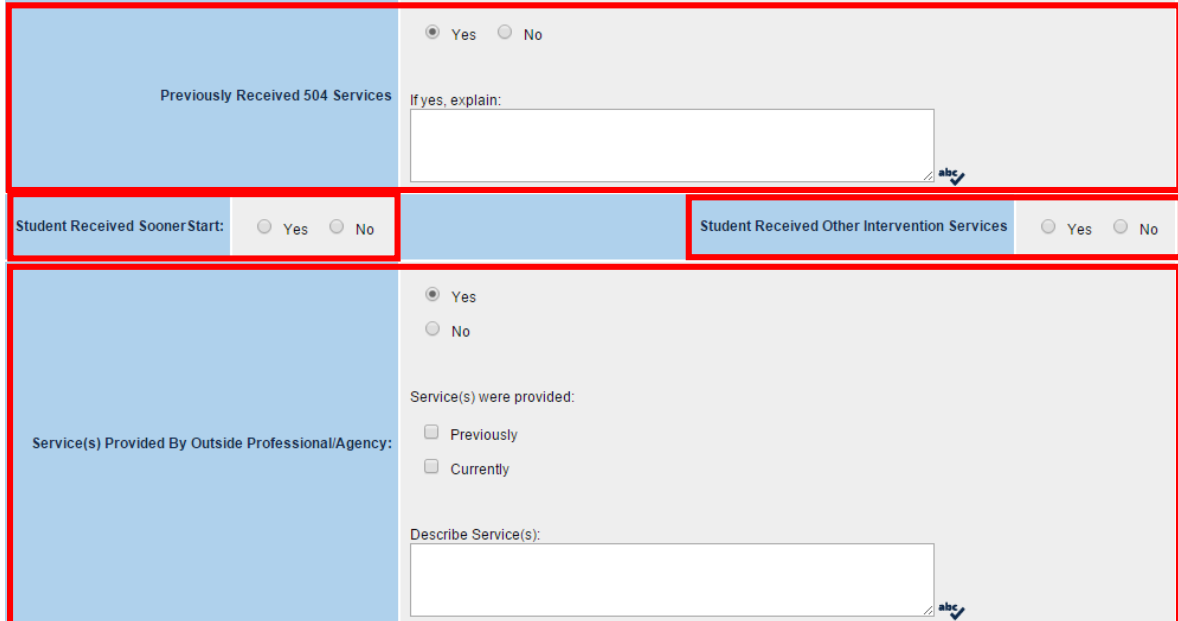
## OK EdPlan™ - Eligibility Manual

Service History:	
Currently Receives Special Education Services	<input type="radio"/> Yes <input type="radio"/> No
Previously Received Special Education Services	<input type="radio"/> Yes <input type="radio"/> No
Currently Receives 504 Services	<input type="radio"/> Yes <input type="radio"/> No
Previously Received 504 Services	<input type="radio"/> Yes <input type="radio"/> No
Student Received SoonerStart:	<input type="radio"/> Yes <input type="radio"/> No
	Student Received Other Intervention Services <input type="radio"/> Yes <input type="radio"/> No
Service(s) Provided By Outside Professional/Agency:	<input type="radio"/> Yes <input type="radio"/> No

9. On the 'Service History' section of the RED page note, as shown in the following image, as you select responses to the questions, other fields will open and require information to be entered accordingly. Users should make sure that all information is completed.

Previously Received Special Education Services	<input checked="" type="radio"/> Yes <input type="radio"/> No Eligible Under: <input type="checkbox"/> Autism <input type="checkbox"/> Intellectually Disabled <input type="checkbox"/> Specific Learning Disability <input type="checkbox"/> Deaf-Blindness <input type="checkbox"/> Multiple Disabilities <input type="checkbox"/> Speech or Language Impairment <input type="checkbox"/> Developmentally Delayed <input type="checkbox"/> Orthopedic Impairment <input type="checkbox"/> Traumatic Brain Injury <input type="checkbox"/> Emotional Disturbance <input type="checkbox"/> Other Health Impairments <input type="checkbox"/> Visual Impairment (including Blindness) <input type="checkbox"/> Hearing Impairment (including Deafness)
Currently Receives 504 Services	<input checked="" type="radio"/> Yes <input type="radio"/> No If yes, explain: <input type="text"/>

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The screenshot shows a web form with the following sections:

- Previously Received 504 Services:** A section with a radio button for 'Yes' (selected) and 'No'. Below it is a text area labeled 'If yes, explain:' with a small 'abc' icon at the bottom right.
- Student Received Sooner Start:** A section with radio buttons for 'Yes' and 'No'.
- Student Received Other Intervention Services:** A section with radio buttons for 'Yes' and 'No'.
- Service(s) Provided By Outside Professional/Agency:** A section with radio buttons for 'Yes' (selected) and 'No'. Below it are two checkboxes: 'Previously' and 'Currently'. At the bottom is a text area labeled 'Describe Service(s):' with a small 'abc' icon at the bottom right.

- **'Previously Received Special Education Services'** should be addressed if the student has received services before this data review. If this questions is answered with 'Yes' the section for definition of Eligibility information will open to indicate the appropriate areas for Eligibility.
  - The next sections are to capture information about whether the student **'Currently Receives 504 Services'** or **'Previously Receives 504 Services'** and, if yes, areas to explain what those services are or have been.
  - **'Student Received Sooner Start'** and **'Student Received Other Intervention Services'** is to be addressed to indicate if the student had received early intervention services.
  - **'Service(s) Provided by Outside Professional / Agency'** allows a user to indicate any services that are or have been provided to the student by an outside provider.
10. The **'Documentation of Interventions'** section of the page is *REQUIRED* if the suspected disability is Specific Learning Disability and the system will fire error messages upon 'Save and Continue' if that is the selection made by the team; however, this section is open on Initial and Re-evaluation reviews for data entry for any suspected disability category.

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DOCUMENTATION OF INTERVENTIONS		
		Targeted Behavior/Skill: <input type="text"/>
Goal(s):	Was goal accomplished?	Recommended Action:
<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
<a href="#">Add Additional Goal Data</a>		

- The **'Targeted Behavioral/Skill'** section should be completed to include any information that has been collected about the targeted behavior or skill that has been addressed through the Response to Intervention work prior to the review.
- Multiple **'Goal(s)'**, **'Was Goal Accomplished'**, and **'Recommended Actions'** can be entered with text boxes and radio buttons as appropriate.
- If there are more than three **'Goal(s)'**, click the [Add Additional Goal Data](#) button to enter as many additional goals as necessary.

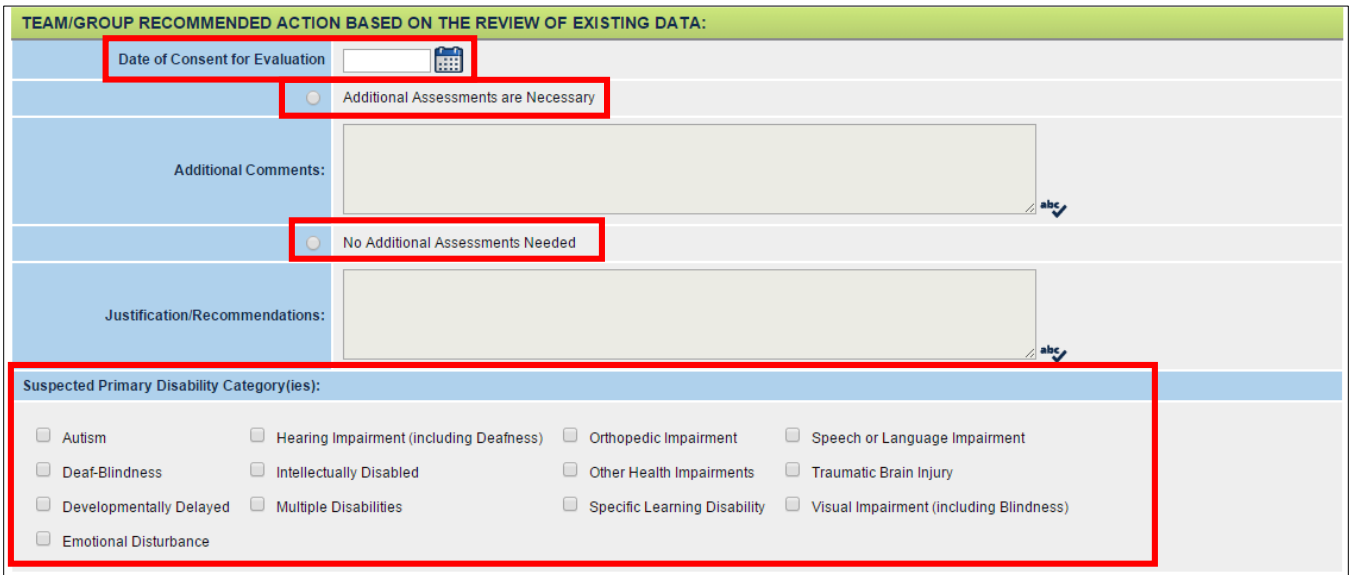
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	Interventions Attempted:	<input type="text"/> <input type="text"/>	<input type="text"/>
		<input type="button" value="Add Additional Intervention Data"/>	
	Frequency and Duration:	<input type="text"/>	
	Treatment Integrity Data:	<input type="text"/>	
	Type of Measure Used to Define Outcome:	Measure: <input type="text"/>	<input type="text"/>
		Define Outcome: <input type="text"/>	<input type="text"/>


- Any Interventions that have been implemented for the student prior to the data review can be entered in the **'Interventions Attempted'** section and by clicking  more text fields will open. All data entered on the page will print to the Draft or Final RED document when created
- Enter the **'Frequency and Duration'** and **'Treatment Integrity Data'** related to all interventions in the appropriate text fields.
- Include information about the type of measure and expected outcome in the **'Type of Measure Used to Define Outcome'** option. Use the following textbox to then further define the outcome.

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11. The final section on the Review of Existing Data tab, '**Team/Group Recommended Action Based on the Review of Existing Data:**' should be completed AFTER the team meeting or meeting with the parent.



**TEAM/GROUP RECOMMENDED ACTION BASED ON THE REVIEW OF EXISTING DATA:**

Date of Consent for Evaluation:  

Additional Assessments are Necessary

Additional Comments:

No Additional Assessments Needed

Justification/Recommendations:

**Suspected Primary Disability Category(ies):**

Autism     
  Hearing Impairment (including Deafness)     
  Orthopedic Impairment     
  Speech or Language Impairment  
 Deaf-Blindness     
  Intellectually Disabled     
  Other Health Impairments     
  Traumatic Brain Injury  
 Developmentally Delayed     
  Multiple Disabilities     
  Specific Learning Disability     
  Visual Impairment (including Blindness)  
 Emotional Disturbance

- Once the team has determined that Additional Assessments are Necessary (for all review types including Initial, Re-evaluation, Out of State Transfer, and Functional Behavior) the date of parent consent will be entered in the '**Date of Consent for Evaluation**' section. The Draft RED page can be created without this information; however, the final RED document will not be able to be created. This date will trigger the 45 day clock from permission to Eligibility Determination.
- If additional Assessments are necessary, click the radio button indication '**Additional Assessments are Necessary**'. Any '**Additional Comments**' related to the meeting or parent consent can be entered in the available text field.
- If the team determines that the data that was reviewed is sufficient for determination of initial or continuation of eligibility the '**No Additional Assessments Needed**' radio button should be selected. The user will have to document the '**Justification/Recommendations:**' if this is selected.
- Users must select any '**Suspected Primary Disability Category**' that is determined as part of the meeting. This is a multi-select box that can allow one or more selection. Depending on the selection, other fields may open up for further indication and selection. Note in the image below the user has selected 'Multiple Disabilities' and 'Developmental Delay' which requires the indication of the 'Suspected Disability' and/or the 'Concomitant Disability(ies)'.
  - Multiple Disabilities
  - Developmental Delay

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Suspected Primary Disability Category(ies):			
<input type="checkbox"/> Autism	<input type="checkbox"/> Hearing Impairment (including Deafness)	<input type="checkbox"/> Orthopedic Impairment	<input type="checkbox"/> Speech or Language Impairment
<input type="checkbox"/> Deaf-Blindness	<input type="checkbox"/> Intellectually Disabled	<input type="checkbox"/> Other Health Impairments	<input type="checkbox"/> Traumatic Brain Injury
<input checked="" type="checkbox"/> Developmentally Delayed	<input checked="" type="checkbox"/> Multiple Disabilities	<input type="checkbox"/> Specific Learning Disability	<input type="checkbox"/> Visual Impairment (including Blindness)
<input type="checkbox"/> Emotional Disturbance			
If Multiple Disabilities is selected define the suspected concomitant disabilities:			
<input type="checkbox"/> Autism	<input type="checkbox"/> Emotional Disturbance	<input type="checkbox"/> Orthopedic Impairment	<input type="checkbox"/> Speech or Language Impairment
<input type="checkbox"/> Deaf-Blindness	<input type="checkbox"/> Hearing Impairment (including Deafness)	<input type="checkbox"/> Other Health Impairments	<input type="checkbox"/> Traumatic Brain Injury
<input type="checkbox"/> Developmentally Delayed	<input type="checkbox"/> Intellectually Disabled	<input type="checkbox"/> Specific Learning Disability	<input type="checkbox"/> Visual Impairment (including Blindness)
If Developmental Delay is selected define the suspected disabilities:			
<input type="checkbox"/> Autism	<input type="checkbox"/> Hearing Impairment (including Deafness)	<input type="checkbox"/> Orthopedic Impairment	<input type="checkbox"/> Speech or Language Impairment
<input type="checkbox"/> Deaf-Blindness	<input type="checkbox"/> Intellectually Disabled	<input type="checkbox"/> Other Health Impairments	<input type="checkbox"/> Traumatic Brain Injury
<input type="checkbox"/> Developmentally Delayed	<input type="checkbox"/> Multiple Disabilities	<input type="checkbox"/> Specific Learning Disability	<input type="checkbox"/> Visual Impairment (including Blindness)
<input type="checkbox"/> Emotional Disturbance			

### Create Written Notice and Parent Consent from RED page.

- While you are working within the student's RED page you can scroll to the bottom and click to create a draft and/or final written notice or parent consent document by clicking, the 'Create Draft Written Notice', 'Create Final Written Notice', 'Create Draft Parent Consent', or 'Create Final Parent Consent' buttons.

<input type="button" value="Back"/>	<input type="button" value="Save"/>	<input type="button" value="Save and Continue"/>
<input type="button" value="Create Draft RED"/>	<input type="button" value="Create Final RED"/>	
<input type="button" value="Create Draft Written Notice"/>	<input type="button" value="Create Final Written Notice"/>	
<input type="button" value="Create Draft Parent Consent"/>	<input type="button" value="Create Final Parent Consent"/>	

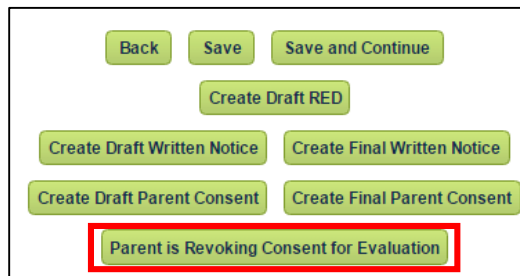
- Once one of these documents have been created, you will see the document available for your review at the bottom of the RED page within the document generation table.

**Note:** This document will also, be available at the bottom of the 'Eligibility Determination' and the 'Documents' tab.

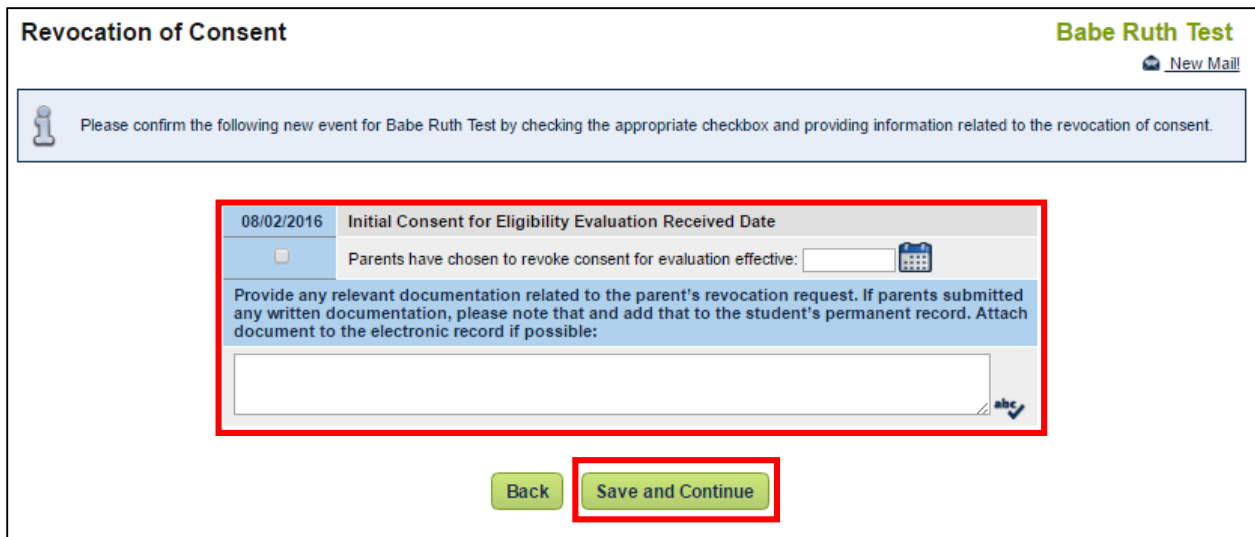
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### Discontinue Consent Timeline when Parent Revokes consent

1. There is now a revocation of consent button within the REDs page to discontinue the parent consent timeline. First, the RED document will have to be finalized within the parent consent event within the 'Student History page.
2. Scroll to the bottom of the page and click on the 'Parent is Revoking Consent for Evaluation' button.



3. Fill out the information within the 'Revocation of Consent' page and click to 'Save and Continue.'



**Revocation of Consent** Babe Ruth Test [New Mail!](#)

Please confirm the following new event for Babe Ruth Test by checking the appropriate checkbox and providing information related to the revocation of consent.

08/02/2016 Initial Consent for Eligibility Evaluation Received Date

Parents have chosen to revoke consent for evaluation effective:

Provide any relevant documentation related to the parent's revocation request. If parents submitted any written documentation, please note that and add that to the student's permanent record. Attach document to the electronic record if possible:


4. Within the student's 'Student History' tab you will see a "blue" event to show 'Parent Consent Denial.'

<input type="checkbox"/>	502	08/02/2016	Parent Consent	<input type="text"/>	<input type="text"/>	Cory Wall	OK Eligibility - RED (ID# 1773)	08/02/2016 11:46 (0 days)	<a href="#">Details</a>
<input checked="" type="checkbox"/>	503	08/02/2016	Parent Consent Denial	<input type="text"/>	<input type="text"/>	Cory Wall		08/02/2016 11:54 (0 days)	Consent Denial Reason: They would like to discontinue the assessments to provide special education services.

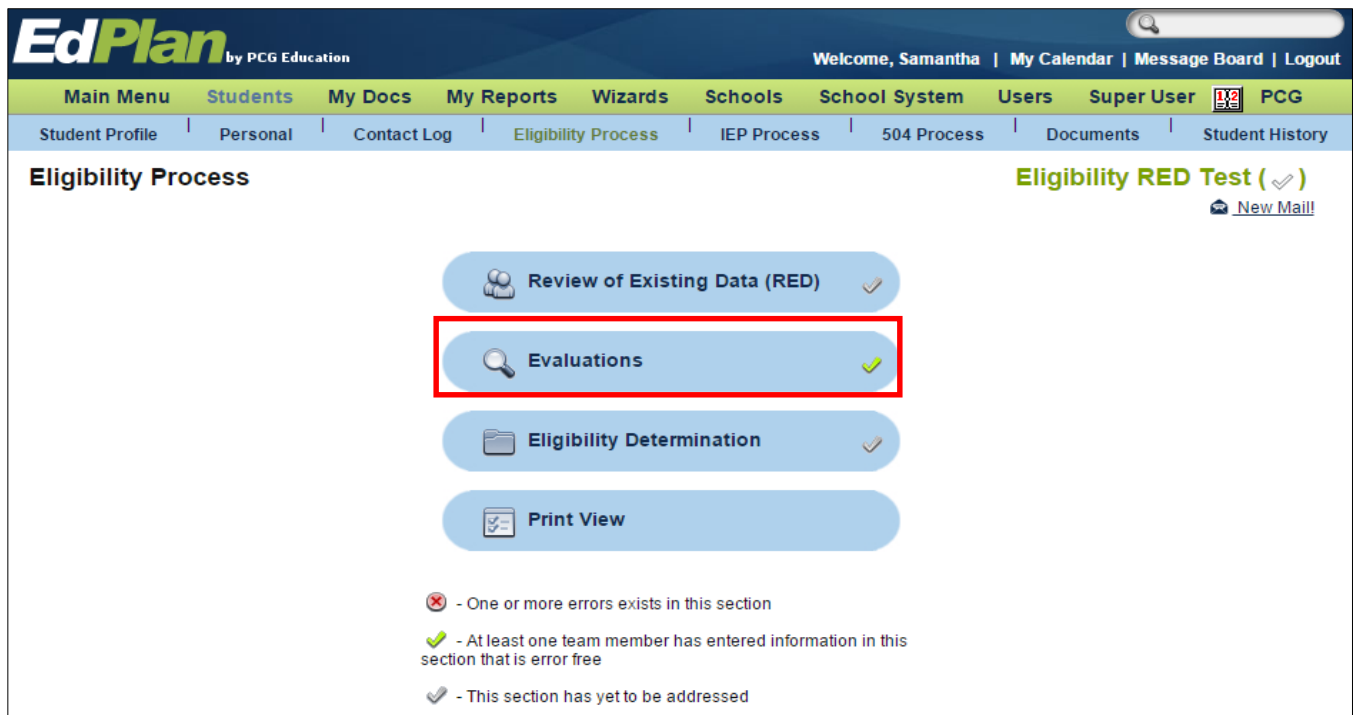
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### Evaluations

The Evaluations page is designed to collect any evaluation information related to evaluations and assessments that have been or will be conducted on the student. Information from outside sources, internal district testing results, or any evaluation or observation data can be entered.

**NOTE:** Users can click on the  symbol to collapse the assessments and clear up the page for easier reading. In the coming year PCG will auto collapse the assessments for all users going forward.

1. From the Eligibility Process tab, click on the **'Evaluations'** page.



The screenshot shows the EdPlan interface. The top navigation bar includes 'EdPlan by PCG Education', 'Welcome, Samantha', 'My Calendar', 'Message Board', and 'Logout'. Below this is a main menu with 'Main Menu', 'Students', 'My Docs', 'My Reports', 'Wizards', 'Schools', 'School System', 'Users', 'Super User', and 'PCG'. A secondary navigation bar contains 'Student Profile', 'Personal', 'Contact Log', 'Eligibility Process', 'IEP Process', '504 Process', 'Documents', and 'Student History'. The 'Eligibility Process' section is active, displaying a list of options: 'Review of Existing Data (RED)', 'Evaluations', 'Eligibility Determination', and 'Print View'. The 'Evaluations' option is highlighted with a red box and has a green checkmark. To the right, there is a notification for 'Eligibility RED Test (✓)' with a 'New Mail!' icon. A legend at the bottom explains the icons: a red X for errors, a green checkmark for error-free information, and a grey checkmark for unaddressed sections.

2. **'Observation Information'** and **'Sociocultural Information'** will now be addressed on the Evaluation page. Please note, you can click the Add More <Observation/Sociocultural> data buttons to add another observation or sociocultural result.



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Observation Information			
Include in Doc	Observation Type	Person Completing Observation	Date of Observation
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Results Summary Data	<input type="text"/>		
<a href="#">Add More Observation Data</a>			
Sociocultural Information			
Include in Doc	Source	Date Collected	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Results Summary Data	<input type="text"/>		
<a href="#">Add More Sociocultural Data</a>			

- Click on **'Add Assessment'** Once this has been chosen, the user can select up to four Assessments at a time from the **'Add Assessment from a List'** dropdown. Users can add more than four but will only be able to add four at one time before the page is refreshed by selecting **'Save'**, or **'Save and Continue'**.

Add Assessments from a List	
Assessment	<input type="text"/>
Assessment	<input type="text"/>
Assessment	<input type="text"/>

- Once the Assessment has been selected the user is asked to select any and all assessment 'areas' that will be addressed through this measure. This is a multi select list and can accommodate as many selections as necessary to completely document the assessment being given.

## OK EdPlan™ - Eligibility Manual

**Add Assessments**
**Eligibility RED Test**

[New Mail!](#)

**Add Assessments from a List**

**Assessment**

Adap. Beh. Assess. System- 2nd Ed. Parent Form, Ages, 0-5 (ABAS-II PRF)

**Please select all assessment areas that will be addressed through this assessment:**

<input checked="" type="checkbox"/> Psychological Social/Emotional	<input type="checkbox"/> Academics-Reading Fluency	<input type="checkbox"/> Transition Services
<input checked="" type="checkbox"/> Intellectual/Cognitive	<input type="checkbox"/> Academics-Written Expression	<input type="checkbox"/> Vision
<input type="checkbox"/> Academic Readiness	<input checked="" type="checkbox"/> Adaptive Behavior	<input type="checkbox"/> Developmental
<input type="checkbox"/> Academics-Basic Reading Skills	<input type="checkbox"/> Communication	<input type="checkbox"/> Functional Behavior Assessment
<input type="checkbox"/> Academics-Listening Comprehension	<input type="checkbox"/> Fine Motor	<input type="checkbox"/> Sociocultural
<input type="checkbox"/> Academics-Math	<input type="checkbox"/> Gross Motor	<input type="checkbox"/> Health/Medical
<input type="checkbox"/> Academics-Math Calculation	<input type="checkbox"/> Hearing	<input type="checkbox"/> Vocational
<input type="checkbox"/> Academics-Math Problem Solving	<input type="checkbox"/> Medical/Physical Needs	<input type="checkbox"/> Motor
<input type="checkbox"/> Academics-Oral Expression	<input type="checkbox"/> Sensory Processing	<input type="checkbox"/> Assistive Technology
<input type="checkbox"/> Academics-Reading	<input type="checkbox"/> Social/Emotional Behavior	<input type="checkbox"/> Perceptual/Processing
<input type="checkbox"/> Academics-Reading Comprehension	<input type="checkbox"/> Speech\Language	

**NOTE:** Users can also enter ‘**Custom Assessments**’ that will be or have been administered by entering the assessment name and then following the same steps to select the ‘assessment area’.

**Add Custom Assessments**

Please enter the name of the Assessment below. This Assessment will print to the IEP Document.

**Assessment**

**Assessment**

- Once the user has completed the information they will select ‘**Save and Continue**’ to continue through the processing of the page.
5. Once the user has selected the assessment that has been or will be administered and selected ‘Save and Continue’ they will be able to enter the ‘**Assessment Date**’, ‘**Component Areas**’ (subtests of the Method of Assessment), ‘**Score Types**’, and ‘**Details**’ about the assessment once complete.

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Del	Pos	Assessment Date	Method of Assessment	Assessment Category	Component Area	Score Types	
	1000	09/03/2015	Adap. Beh. Assess. System-2nd Ed. Parent Form, Ages, 0-5 (ABAS-II PRF)	Adaptive Behavior	<input type="checkbox"/> Global Adaptive Composite (GAC) <input type="checkbox"/> Conceptual Composite <input type="checkbox"/> Communication <input type="checkbox"/> Functional Pre-Academics <input checked="" type="checkbox"/> Self-Direction <input checked="" type="checkbox"/> Social Composite <input type="checkbox"/> Leisure <input type="checkbox"/> Social <input type="checkbox"/> Practical Composite <input type="checkbox"/> Community Use <input type="checkbox"/> Home Living <input type="checkbox"/> Health and Safety <input type="checkbox"/> Self-Care <input type="checkbox"/> Motor	<input type="checkbox"/> Confidence Intervals <input type="checkbox"/> T-Score <input type="checkbox"/> Within Functional Limits (WFL) <input type="checkbox"/> Passed Y or N <input type="checkbox"/> Stanine <input type="checkbox"/> Scaled Score <input type="checkbox"/> Within Normal Limits (WNL) <input type="checkbox"/> Full Scale <input type="checkbox"/> Verbal <input type="checkbox"/> Performance <input type="checkbox"/> Grade Equivalent <input checked="" type="checkbox"/> Age Equivalent <input type="checkbox"/> Composite Score <input type="checkbox"/> Standard Score <input type="checkbox"/> Percentile Rank <input type="checkbox"/> Number Correct <input type="checkbox"/> Number Incorrect	<a href="#">Details</a>

6. Once the user has entered and selected the 'Assessment Date', 'Component Areas', and 'Score Types' they click on the 'Details' button and will be taken to the page where they will enter the scores, dates scored, and any 'Assessment Narrative' information and shown in the image that follows. Users are automatically provided two available entry sections but only have to report one level of scores. Scores are separated by component area.

**Add Assessment Results/Objective Statements** **Eligibility RED Test** [New Mail](#)

**Assessment:** Adap. Beh. Assess. System- 2nd Ed. Parent Form, Ages, 0-5 (ABAS-II PRF)

**Assessment Area:** Adaptive Behavior

**Assessment Narrative:** Overall Description or Summary of Assessment

Del	Date	Component	Age Equivalent
	<input type="text"/>	Self-Direction	<input type="text"/>
	<input type="text"/>	Self-Direction	<input type="text"/>
	<input type="text"/>	Social Composite	<input type="text"/>
	<input type="text"/>	Social Composite	<input type="text"/>

- When complete the user can enter 'Save and Continue' to be carried back to the Evaluations landing page and can add more assessments or return from there to the main process page.

## OK EdPlan™ - Eligibility Manual

### Eligibility Determination – MEEGS

- Initial Eligibility Determination (with or without further testing)
- Re-evaluation or change in disability (with or without further testing)
- Transfer from out of state (short term while further testing needs to be completed)
- Transfer from out of state (with no further testing)
- Transfer from inside OK for students who do not have eligibility dates in their history.
- De-Certification from Eligibility
- Parent Refusal of Services
- Non-Eligibility Determination after testing.

1. From the Eligibility Process click on the ‘**Eligibility Determination**’ button



The screenshot shows the EdPlan interface for the Eligibility Process. The top navigation bar includes 'EdPlan by PCG Education', 'Welcome, Samantha', 'My Calendar', 'Message Board', and 'Logout'. Below this is a menu with 'Main Menu', 'Students', 'My Docs', 'My Reports', 'Wizards', 'Schools', 'School System', 'Users', 'Super User', and 'PCG'. A secondary menu shows 'Student Profile', 'Personal', 'Contact Log', 'Eligibility Process', 'IEP Process', '504 Process', 'Documents', and 'Student History'. The main content area is titled 'Eligibility Process' and features a 'New Mail!' notification. A list of buttons is displayed: 'Review of Existing Data (RED)' (with a grey checkmark), 'Evaluations' (with a green checkmark), 'Eligibility Determination' (with a grey checkmark and highlighted by a red box), and 'Print View' (with a document icon). A legend at the bottom explains the icons: a red X for 'One or more errors exists in this section', a green checkmark for 'At least one team member has entered information in this section that is error free', and a grey checkmark for 'This section has yet to be addressed'.

2. Once the user has opened the page, if data has been entered and finalized through the ‘**Review of Existing Data (RED)**’ page the decisions will appear in the first section of the page labeled ‘**Type of Evaluation Being Conducted**’. Note on the screenshot below, this student has not had a finalized RED process and therefore does not have any information appearing in this section; however, the Draft and Final version of this document can be created without this information.
3. Users must enter the ‘**Eligibility Determination Meeting Date**’ prior to creating the FINAL version of the document. This date will drive the calculation of the three year, re-evaluation by the system. Because the Eligibility is a team

## OK EdPlan™ - Eligibility Manual

decision and should not be made in advance of the meeting with the parents and the team, users will not be able to finalize this document with a future date.

TYPE OF EVALUATION BEING CONDUCTED:	
Initial Evaluation	Yes 07/15/2016
*The determination of initial eligibility and educational needs must be completed within 45 school days of receiving parental consent for the evaluation.	
Transfer of Student from Outside Oklahoma with Additional Assessments	No
Transfer of Student from Outside Oklahoma with No Additional Assessments	No
Reevaluation with Additional Assessments	No
Reevaluation with No Additional Assessments	No
Suspected Primary Disability Category(ies):	Speech or Language Impairment

4. The next section that should be reviewed and completed during the team meeting will be the ‘**Eligibility Determination**’ section where users will respond to a series of six questions that will determine the student Eligibility for Special Education. Note in the example provided here the first question has been defaulted to N/A because it has not been indicated that this Eligibility determination is for Specific Learning Disability. If that is the team decision and it is included later in the process this field will open and allow the selection. All fields are required to complete a final version of the document.

ELIGIBILITY DETERMINATION	
Considerations	
The team considered the following effect: environmental; cultural; or economic factors, as well as visual, hearing, intellectual, motor or emotional disability; or limited English proficiency, and has determined they are not the primary reason for the suspected disability. (Must be considered and ruled out only for SLD.)	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/A
Evaluation conducted in primary language or the student's other mode of communication.	<input type="radio"/> Yes <input type="radio"/> No
The student meets the criteria for one or more disabilities under the IDEA.	<input type="radio"/> Yes <input type="radio"/> No
The disability adversely impacts the student's education.	<input type="radio"/> Yes <input type="radio"/> No
Because of the disability and its adverse impact on the student's education, the student requires special education services.	<input type="radio"/> Yes <input type="radio"/> No
The student's educational performance is not based primarily on a lack of appropriate instruction in (A) reading (including the essential components: phonemic awareness; phonics; vocabulary development; reading fluency, including oral reading skills; and reading comprehension strategies), (B) math, or (C) limited English proficiency.	<input type="radio"/> Yes <input type="radio"/> No

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5. On the ‘**Evaluation Data**’ section, users are able to indicate which assessment data needs to be included in the Eligibility Determination documentation by checking the box in the column marked ‘**Inc. on Doc**’. Because this table will grow as the student continues receiving Special Education Services, this is where the team will indicate what current and previous data was included in the determination decision.

Evaluation Data: Indicate which assessments you wish to include in the document.						
Inc on Doc	Assessment Date	Method of Assessment	Assessment Category	Component Area	Scores Types	
		▼ Adap. Beh. Assess. System- 2nd Ed. Parent Form, Ages, 0-5 (ABAS-II PRF)				
<input checked="" type="checkbox"/>	09/03/2015	Adap. Beh. Assess. System- 2nd Ed. Parent Form, Ages, 0-5 (ABAS-II PRF)	Adaptive Behavior	Self-Direction Social Composite	Age Equivalent	<a href="#">Details</a>
<input checked="" type="checkbox"/>		Adap. Beh. Assess. System- 2nd Ed. Parent Form, Ages, 0-5 (ABAS-II PRF)	Psychological Social/Emotional			<a href="#">Details</a>
<input checked="" type="checkbox"/>		Adap. Beh. Assess. System- 2nd Ed. Parent Form, Ages, 0-5 (ABAS-II PRF)	Intellectual/Cognitive			<a href="#">Details</a>
		▼ Woodcock Johnson Test of Achievement, 4th Edition (WJ-IV ACH)				
<input checked="" type="checkbox"/>	09/02/2015	Woodcock Johnson Test of Achievement, 4th Edition (WJ-IV ACH)	Academics-Basic Reading Skills	Basic Reading Skills Reading Fluency	Standard Score	<a href="#">Details</a>
<input checked="" type="checkbox"/>	09/03/2015	Woodcock Johnson Test of Achievement, 4th Edition (WJ-IV ACH)	Academics-Reading Comprehension	Reading Comprehension Passage Comprehension	Standard Score	<a href="#">Details</a>
<input checked="" type="checkbox"/>	09/03/2015	Woodcock Johnson Test of Achievement, 4th Edition (WJ-IV ACH)	Academics-Reading	Letter-Word Identification	Standard Score	<a href="#">Details</a>

6. Upon entering all the information on the page up to this point it is now time for the team to document the determination. This section is dynamic depending on the choices that are made. The image below depicts the table prior to a selection being made on the page. The Summary of Eligibility Determination Section is always required no matter what the determination of the team and will always be present for completion.

**Based on information from a variety of sources that have been documented and carefully considered, the IEP team has determined:**

This student is Eligible for Special Education because s/he meets the State of Oklahoma eligibility standards for the disability/disabilities indicated below:

This student is being made eligible so commensurate services can be provided while further evaluation is being conducted to establish eligibility under Oklahoma Eligibility Standards.

This student is Eligible for Special Education because s/he meets the State of Oklahoma's eligibility standards for the following disabilities; however, the student's parent/guardian is declining services. This student will not receive special education or related services.

This student is Not Eligible for Special Education because s/he does not meet state standards for a disability.

**Summary of Eligibility Determination:**

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7. If the user selects the 'student is Eligible for Special Education' they will be presented with the following section that will allow them to define the disability categories.

Based on information from a variety of sources that have been documented and carefully considered, the IEP team has determined:

- This student is Eligible for Special Education because s/he meets the State of Oklahoma eligibility standards for the disability/disabilities indicated below:

Primary Disability:

Secondary Disability:

8. The following shows if the student is determined to have the primary disability of (a) **Specific Learning Disability** which requires the definition of *Deficit Areas*; (b) **Developmental Delay** which required the definition of a *Suspected Disability*; or (c) **Multiple Disabilities** which require the determination of the *Concomitant Disability(ies)*.

This student is Eligible for Special Education because s/he meets the State of Oklahoma eligibility standards for the disability/disabilities indicated below:

Primary Disability:

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Basic Reading Skills    | <input type="checkbox"/> Math Problem Solving  | <input type="checkbox"/> Reading Fluency    |
| <input type="checkbox"/> Listening Comprehension | <input type="checkbox"/> Oral Expression       | <input type="checkbox"/> Written Expression |
| <input type="checkbox"/> Math Calculation        | <input type="checkbox"/> Reading Comprehension |   |

This student is Eligible for Special Education because s/he meets the State of Oklahoma eligibility standards for the disability/disabilities indicated below:

Primary Disability:

Secondary Disability:

This student is Eligible for Special Education because s/he meets the State of Oklahoma eligibility standards for the disability/disabilities indicated below:

Primary Disability:

- |  |  |   |  |
|--|--|---|--|
| <input type="checkbox"/> Autism                  | <input type="checkbox"/> Emotional Disturbance                   | <input type="checkbox"/> Orthopedic Impairment        | <input type="checkbox"/> Speech or Language Impairment           |
| <input type="checkbox"/> Deaf-Blindness          | <input type="checkbox"/> Hearing Impairment (including Deafness) | <input type="checkbox"/> Other Health Impairments     | <input type="checkbox"/> Traumatic Brain Injury                  |
| <input type="checkbox"/> Developmentally Delayed | <input type="checkbox"/> Intellectually Disabled                 | <input type="checkbox"/> Specific Learning Disability | <input type="checkbox"/> Visual Impairment (including Blindness) |



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9. If the user selects the student is *being made eligible so commensurate services can be provided while further evaluation is being conducted* they will be required to identify the Disability category. The same applies here related to **Specific Learning Disability, Developmental Delay, or Multiple Disability(ies)** as when they would select typical eligibility.

**NOTE:** This Eligibility Event will only be valid for 30 days while testing and Eligibility is determined and an IEP is written if necessary.

This student is being made eligible so commensurate services can be provided while further evaluation is being conducted to establish eligibility under Oklahoma Eligibility Standards.

Primary Disability:

Secondary Disability:

10. If the user selects the student is *Eligible for Special education; however, the student's parent is declining Eligibility* they will be required to enter the disability information and the same rules and actions will apply to **Specific Learning Disability, Developmental Delay, or Multiple Disability(ies)**.

This student is Eligible for Special Education because s/he meets the State of Oklahoma's eligibility standards for the following disabilities; however, the student's parent/guardian is declining services. This student will not receive special education or related services.

Primary Disability:

Secondary Disability:

11. If the student is determined to be Eligible for Special Education, the users are required to complete the two sections of **'Educational Strengths'** and **'Educational Needs'** in addition to the **'Summary of Eligibility Determination'**.

**EDUCATIONAL STRENGTHS: (Must be completed if child is eligible for special education and related services.)**

**EDUCATIONAL NEEDS: (Must be completed if child is eligible for special education and related services.)**



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12. Finally, if the user selects the *Student is not Eligible for Special Education* then no further information is required and that student remains in the system as a general education student.

This student is Not Eligible for Special Education because s/he does not meet state standards for a disability.

13. If the student is determined not eligible, the user will have to complete the section that documents **‘Educational Needs’** along with Recommendation(s) to fulfill the needs and the **‘Summary of Eligibility Determination’** sections that appear.

EDUCATIONAL NEEDS (Must be completed if child is not eligible for special education and related services .)	
Educational Need(s):	<input type="text"/> abc ✓
Recommendation(s) to fulfill the need(s):	<input type="text"/> abc ✓

14. Once the user has completed all the information they can select one of the following actions:
- Click the **Back** button to return to Main Menu without saving;
  - Click the **Save** button to save the work you have done and stay on this page; or
  - Click the **Save and Continue** button to save the work you have done and return to Main Menu
2. After the user has saved all the information on the page by either selecting the ‘Save’ or **‘Save and Continue’** button the user can click the **Create Draft Eligibility Determination** button to create a draft Eligibility Determination for review. At this time the checkbox for **‘Print the Comment Form’** can also be selected to print the *‘Comment Form’* when the Draft *‘Eligibility Determination Document’* prints to take the meeting with the team.
16. Following the meeting, the user can return to the system, adjust any of the data that was discussed and altered during the meeting, Click the **‘Save’** or **‘Save and Continue’** button to save all changes and check for errors and then select the **Create Final Eligibility Determination** to create the event in the system and start the clock for the three year re-evaluation.

**NOTE:** The **‘Create Final Eligibility Determination’** button will not appear for possible selection until all errors have been corrected on the page.

### Create Written Notice from Eligibility Determination page.

- While you are working within the student’s Eligibility Determination page you can scroll to the bottom and click to create a draft and/or final written notice document by clicking, the ‘Create Draft Written Notice’, ‘Create Final Written Notice’ buttons.


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- Once the document has been created, you will see the document available for your review at the bottom of the Eligibility Determination page within the document generation table.

**Note:** This document will also, be available at the bottom of the 'Eligibility Determination' and the 'Documents' tab.

### Capture reasons for Exceeding Timeline when Initial Eligibility is over 45 days

- If, based on the 'Parent Consent Date' and the 'Eligibility Determination' date the user has exceeded the required 45 days to determine eligibility the section related to reason for delay will appear and require completion. Fill out the information needed for the 'Acceptable Exemptions from Timeline Requirement' or 'Reasons for Delay (not acceptable exemptions from timeline requirement)'. You will not be able to finalize your Eligibility Determination document until this information is complete.

 NOTE: This section has appeared because you are attempting to finalize an Eligibility Determination after the 45 day timeline has passed. Please select the one most appropriate reason for the delay below and, if appropriate, indicate the date in which the district will complete the evaluation.

01/01/2016 Parent Consent for Evaluation

03/07/2016 Anticipated Date of 45 day timeline for Eligibility

**Acceptable Exemptions from Timeline Requirement:**

The parent repeatedly failed or refused to produce the child for the evaluation. Parent did not show for scheduled meeting, or Parent requested to schedule meeting outside required timeline

The child transferred from the district that obtained consent prior to an eligibility determination. The receiving district has made progress towards completing the evaluation. The Parent and LEA agree to complete the evaluation on or before

**Reasons for Delay (not acceptable exemptions from timeline requirement):**

Student/Parent serious medical issues

LEAs failure to follow appropriate procedures

Multidisciplinary Evaluation and Eligibility Group Summary (MEEGS) team decided additional data was necessary

Lack of appropriate LEA resources

Breaks in School/District calendars and/or staff not on contract

Late Referral from SoonerStart

Name of Person completing this information:

Date of Completion:  