

# EdPlan Connect

## User Guide

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**PUBLIC**  
CONSULTING GROUP

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## WHAT IS EDPLAN CONNECT?

### INCREASE FAMILY ENGAGEMENT

*“Family engagement refers to the systematic inclusion of families in activities and programs that promote children’s development, learning, and wellness, including in the planning, development, and evaluation of such activities, programs, and systems.”*

U.S. Dept. of Education, U.S. Dept. of Health & Human Services Policy Statement On Family Engagement From The Early Years To The Early Grades, 2016

EDPlan Connect is our all-in-one PARENT portal that promotes increased family involvement in a child’s education. Educating a child can be a multi-faceted and paperwork intensive process with teachers, families, administrators, doctors, and others all needing to provide input—whether it’s signing an Individualized Education Program (IEP) **OR** consenting to bill Medicaid.

### CENTRALIZED AND SECURE

EdPlan Connect provides parents a centralized and secure place to:

- ▶ Access student records online
- ▶ Sign documents electronically and save time
- ▶ Receive automatic notifications from the school
- ▶ Stay up to date on student progress

## GETTING STARTED

One step in getting started with EdPlan Connect is verifying that the following parent information is entered IIEP:

- ▶ Parent Name
- ▶ Legal Guardian checkbox checked on the parent’s profile
- ▶ At least one parent phone number

► Parent's email address

To view this information, go to the Parents Info tab. Under the Details of the Parent, you can verify that the information is correct or make any necessary updates.

Parents/Guardians							Ed Plan Connect	
Del ?	Pos	New Pos ?	Name *	Relation ?	Home Ph ?	Work Ph ?	Cell Ph ?	?
<input type="checkbox"/>		<input type="checkbox"/>	Mr. & Mrs. Connect	Both Parents	5555555555	8888888888		<a href="#">Details</a>

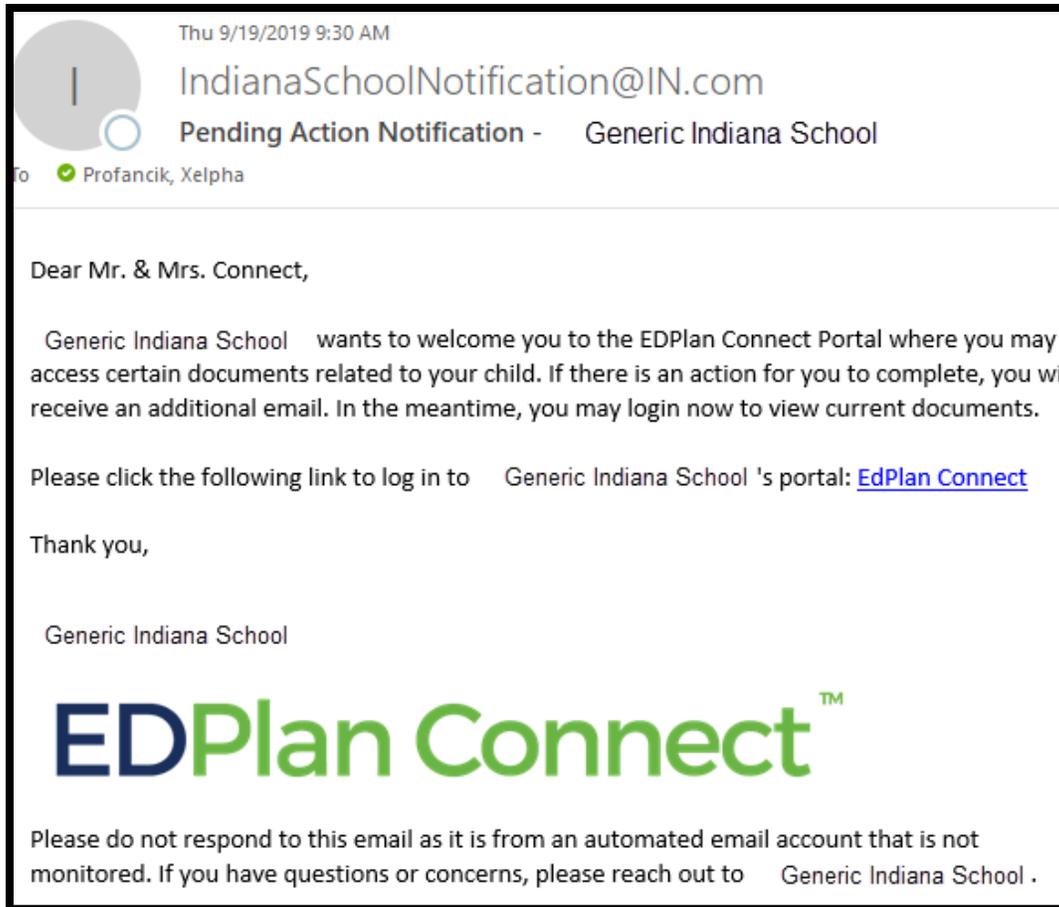
Only one phone number is needed – work, home, cell, or other will all work.

Also, you will now see an additional section in the “Edit Parent/Guardian Information” page of the Parent Info section that is specific for EdPlan Connect.

This is where you click to send parents an email that contains their link to access the parent portal.

\*If the parent does not wish to receive emails or have access to documents electronically, you can click on the “Disable Portal Access”.

By clicking on “Send Adhoc Access Email”, the system will generate and send the following email to the parents:



The documents activated for your site in EdPlan Connect are listed below:

These documents will be pushed to Connect overnight once a final version has been created. They will be available for review only in the parent portal.

- Billing Medicaid for Health-Related Services
- Notice of Initial Evaluation
- Notice of Reevaluation
- Notice of Case Conference (Evaluation)
- Data Points
- ILP
- Annual Parent Notification Letter
- Parent Notification Letter Exit
- Initial Parent Notification Letter
- EL Monitoring Letter
- Notice of Procedural Safeguards

These documents will be pushed to Connect overnight once a final version has been created. They will be available for review and for parent response and signature.

- Notice of Implementation for an IEP/SP
- Notice of Initial Proposed IEP

## WHEN DOES THE PARENT/GUARDIAN RECEIVE THE NOTIFICATION?

Each evening, the system sweeps all new proposed documents and sends one email to parents with any proposed actions in the system for them to review.

## WHAT'S NEXT?

EdPlan Connect is great for documenting communication compliance with the parents and providing documents to them in a timely manner. It is important to keep in mind though that dates and responses for IEP/SP documents (Notice of Implementation) and/or the consent for Medicaid Billing entered via the parent portal will still need entered into IIEP.

### Parent Receipt of Proposed IEP Document

**Instructions:** Please indicate the date the parent received a copy of the proposed IEP document (actual or best estimate). This date will be the basis for the 10 day timeline for the system to auto-accept the IEP if a parent response is not recorded.

Date Parent Received Proposed IEP Document:  

**Instruction -**  
Please ensure that the parent/guardian has signed the IEP prior to entering the parent response. Once you know the status of the Parent/Guardian's response to the proposed IEP, click on the 'Response' button and complete all fields.

Date Generated	Document Type	Status	EasyFax	Date R
10/25/2019	<a href="#">IEP</a>	<input type="button" value="Response"/>		