Initial Eligibility Guide

South Carolina EDPlan Demonstration Site

April 2023

This comprehensive guide is designed to provide you with a step-by-step walkthrough of the EDPlan's features, accompanied by screenshots for visual clarity. While EDPlan is intuitive to use, this guide is meant to serve as a helpful resource for those who want to explore the system fully. If you ever feel lost or confused while using the software, you can refer to the table of contents to navigate through the process.



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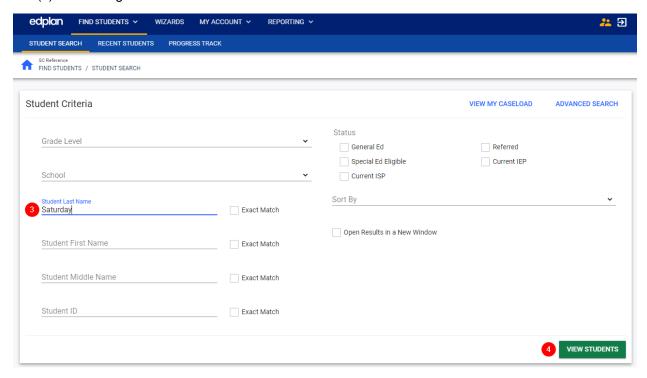
This guide will navigate the process from initial referral to initial eligibility for special education.

LOCATE THE STUDENT

- (1) Click on "Find Students" in the top menu bar.
- (2) Click on "Student Search".



- (3) Enter the student's last name.
- (4) Click the green "View Students" button at the bottom of the screen.



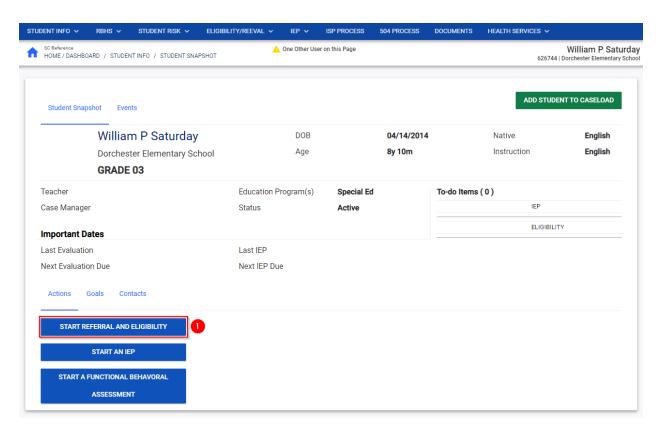
(5) Verify that it is the correct student and then click on the student's name (in blue).



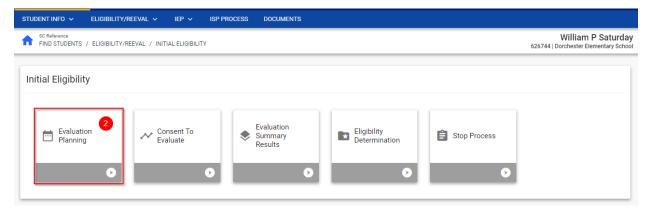
This will bring the user to the Student Snapshot page. This page provides a snapshot of information related to the selected student.

REFERRAL AND ELIGIBILITY

(1) From the Student Snapshot page click on "Start Referral and Eligibility".



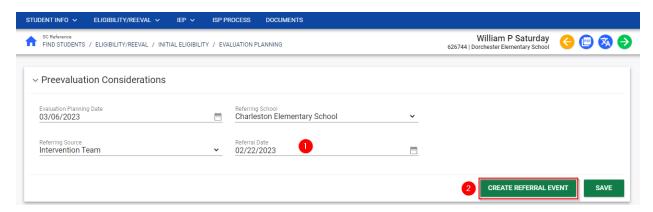
(2) This will take the user to the Initial Eligibility process. Each tile represents a step in the process and gives an overview of the entire Initial Eligibility process. When a step is completed the gray bar at the bottom turns green. Click on the "Evaluation Planning" button to get started with the process.



STEP 1 – EVALUATION PLANNING

PREEVALUATION CONSIDERATIONS

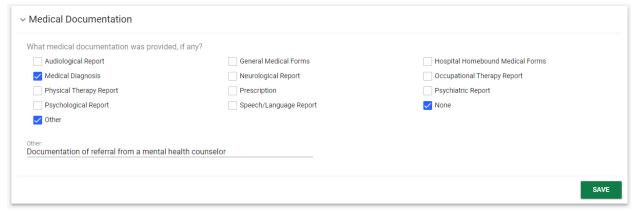
- (1) The user can enter information in the Preevaluation Considerations section of the evaluation planning process.
- (2) When the user clicks the "Create Referral Event" button the process is saved and a Referral event is recorded in the students event history (which is accessible from the Student Snapshot page).



The user can continue to complete the following sections of the evaluation planning process. Note that the user is not required to click the "Save" button after each section. Items in red indicate required fields that the user must complete before finalizing the document.

MEDICAL DOCUMENTATION

The user is able to select all items that apply. If the user selects "Other" they are able to enter additional information.



SECOND LANGUAGE INFORMATION

(1) The user can select the corresponding option based on the student's status. In this case, William is not an English Language Learner.

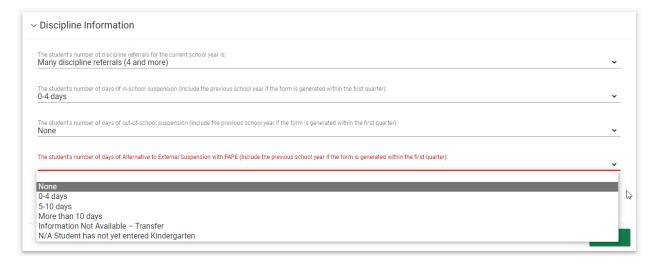


If the student is an English Language Learner, the user will be prompted to enter additional information about their language classification status.



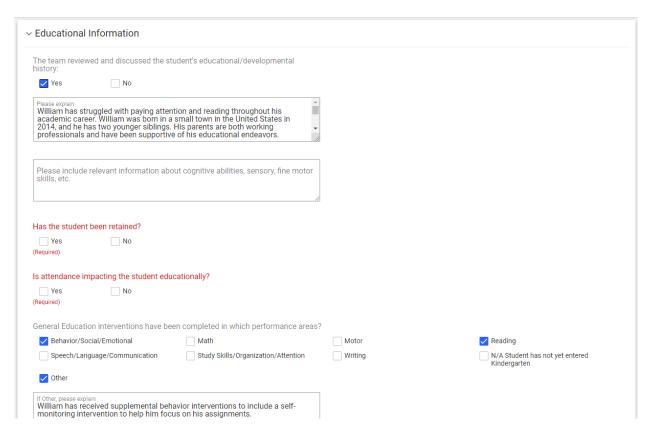
DISCIPLINE INFORMATION

The user is required to select options from a dropdown list to answer 4 questions about the student's discipline information.



EDUCATIONAL INFORMATION

This section gives the user the ability to document information related to the students' developmental and educational history.



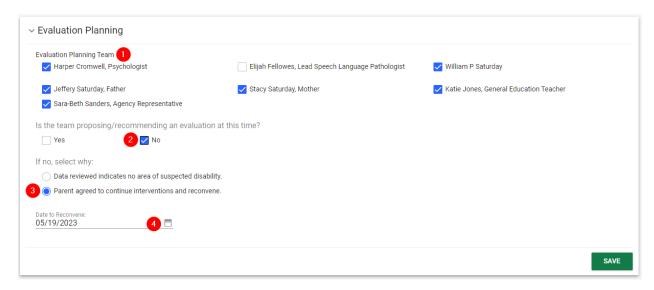
At any point in the process, the user is able to select the "Save" button to save all data that has been entered. The user will see a green "Saved!" notification after clicking on the save button.



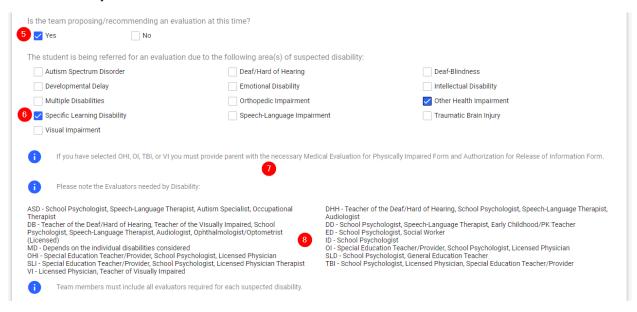
EVALUATION PLANNING

This is where the user can select the members of the evaluation planning team and record the proposal/recommendation from the evaluation planning team.

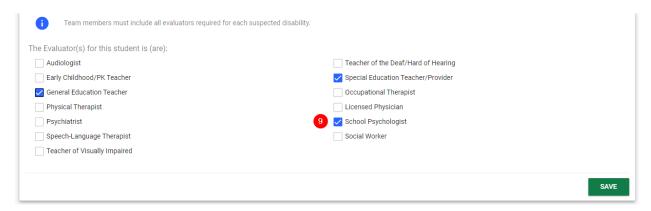
- (1) The user can select who participated in the evaluation planning based on who is associated with the student in their profile. Those selected will appear on the final document for signatures.
- (2) If the team does not suspect a disability or does not propose completing an evaluation at this time they can select "No" (if the user selects "Yes" is explained further below).
- (3) If the user selects no, additional options will be presented. If the user selects "Parent agreed to continue interventions and reconvene" a date box will appear.
- (4) The user can enter the date that the team will reconvene to consider an evaluation.



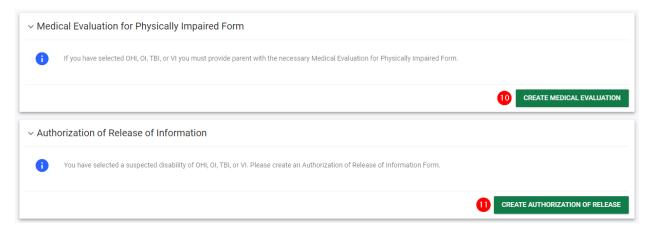
- (5) If the team recommends an evaluation the user can select "Yes"
- (6) The user will then select the area of suspected disability.
- (7) Depending on the areas selected, informational reminders will be presented. For this example, when OHI was selected a reminder is provided that a Medical Evaluation form and an Authorization for Release of Information Form is required.
- (8) Information is included based on the Standards for Evaluation and Eligibility Document (SEED) to remind the team of who must be included on the evaluation team for each category of suspected disability.



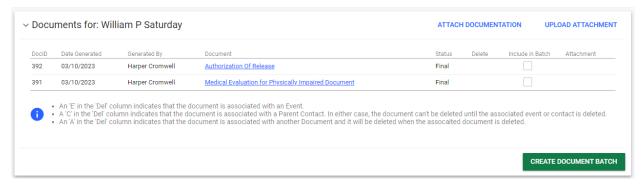
(9) The user selects which evaluators will be included on the evaluation team.



- (10) Given that OHI was selected as a category of suspected disability, the user can click on "Create Medical Evaluation" to create a document that can be sent to the student's medical provider to provide diagnosis information for the evaluation team.
- (11) The user can also click "Create Authorization of Release" to generate a release of information form.



As the authorization and medical forms are created, they can be accessed in the Documents pane at the bottom of the process. The document pane is accessible at the bottom of the page for each process. As documents for the student are created, they will be added to this list. Documents can also be uploaded, and batch printed from this section.



CREATE EVALUATION PLANNING DOCUMENT

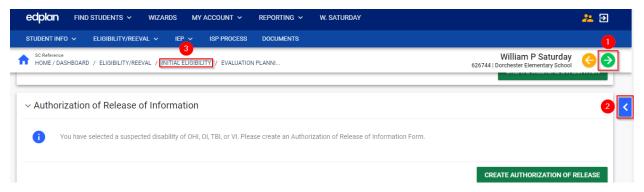
- (1) If the student's document language is set to another language (in this case Spanish), the user can select to include a Spanish version of the document.
- (2) The user can select "Create Final" to finalize the evaluation planning document.



A PDF document is generated with the information entered in the evaluation planning process.

The user can navigate to the next section of the process in one of three ways.

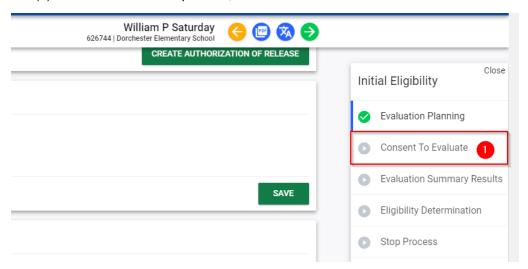
- (1) Click the green arrow to move directly to the next step in the process.
- (2) Click the blue pop out menu to view and select a step in the process.
- (3) Click the breadcrumbs across the top to return to the overview of the initial eligibility process.



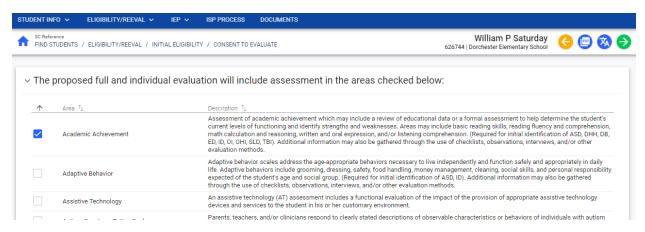
In this scenario, the user used option 2 to select the blue pop out menu.

STEP 2 - CONSENT TO EVALUATE

(1) To continue with the process, the user will select "Consent To Evaluate".

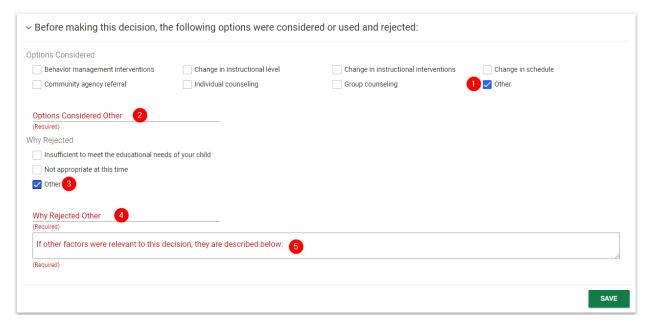


The consent to evaluate will be prepopulated with selections based on the suspected disabilities selected during the evaluation planning process. The user can select and deselect options. Each option selected will print with the description on the consent form.



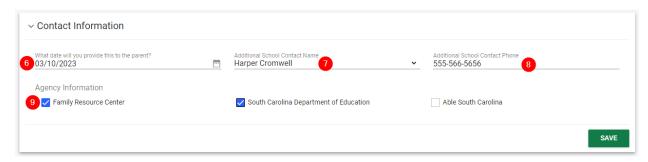
Next the user is asked about options that were considered and rejected. This information will be included in the Prior Written Notice that will be created as a part of this process.

- (1) If the user selects "other"
- (2) They are required to describe the other options considered.
- (3) If the user selects "other" under Why Rejected,
- (4) They are required to write a rejection reason.
- (5) They are also required to describe other factors relevant to the decision.



Next the user can enter contact information related to the consent for evaluation. This information will be printed on the consent for evaluation form.

- (6) Enter the date the consent for will be provided to the parent.
- (7) The contact person at the school responsible for obtaining the consent.
- (8) The phone number for the school contact.
- (9) The user can also select agency information to be included as a part of the Prior Written Notice.



Once the user has entered all relevant information they can select "Create Final" to generate the consent to evaluate form.



A PDF consent form is generated based on the information previously entered.



South Carolina District Consent To Evaluate

 Last Name: Saturday
 First Name: William
 Student ID #: 626744

 Date Created: 03/10/2023
 Grade: 03
 School: Dorchester Elementary School

Date Provided: 03/10/2023

To the Parent or Guardian of William P Saturday

In order to develop an appropriate educational program for your child, additional information is needed. A full and individual evaluation is recommended and is proposed based on your child's educational performance and review of all educational records including previous education information. Your student is being referred for an evaluation in the following area(s) of suspected eligibility(ies): Other Health Impairment, Specific Learning Disability

Your written consent is required to proceed with the evaluation.

Your child will be evaluated in the following area(s):

AREA	DESCRIPTION
Academic Achievement	Assessment of academic achievement which may include a review of educational data or a formal assessment to help determine the student's current levels of functioning and identify strengths and weaknesses. Areas may include basic reading skills, reading fluency and comprehension, math calculation and reasoning, written and oral expression, and/or listening comprehension. (Required for

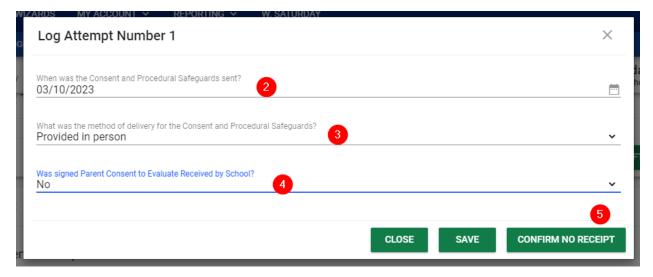
LOGGING ATTEMPTS TO OBTAIN CONSENT

Once the final consent form has been created the user is able to log attempts to obtain consent.

(1) The user can click on "Log Attempt"

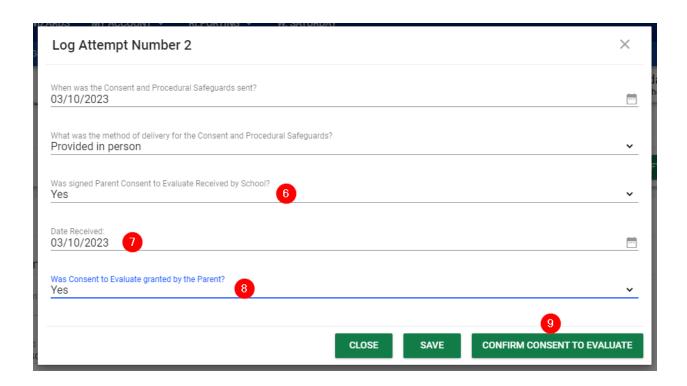


- (2) The user can document the date the consent and procedural safeguards were provided/sent to the parent.
- (3) Select the method of delivery.
- (4) Select whether the consent was received.
- (5) If the user selects "No" then click "Confirm No Receipt"



The attempt is recorded in the Parent Consent section and the user can continue to log attempts to obtain parental consent.

- (6) Once consent is received the user will select "Yes" for the question asking if consent was received.
- (7) The user will enter the date the consent form was received.
- (8) The user will document whether consent was granted. In this example the answer is "Yes".
- (9) The user will click on "Confirm Consent to Evaluate" to complete the process.



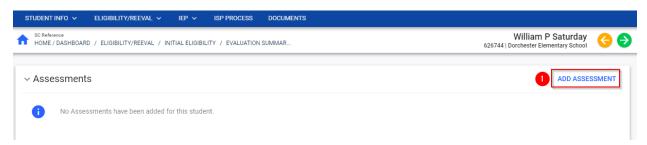
STEP 3 - EVALUATION SUMMARY RESULTS

Once the team has received consent from the parent, they can move to the next step in the process which includes documenting their assessments and creating a notification of meeting to review the results.

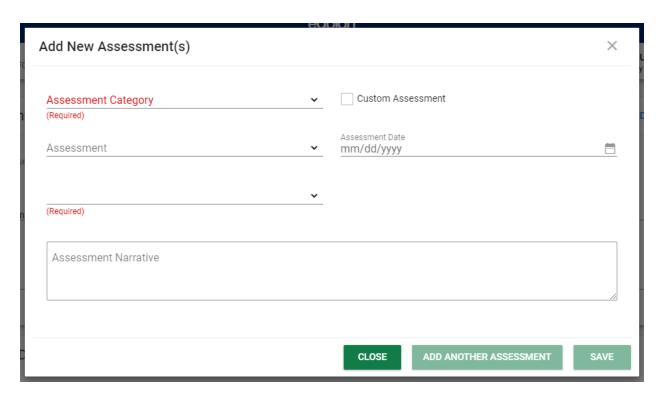
ASSESSMENTS

Evaluators can enter the assessments they complete with students to EDPlan. These assessments can then be added to different documents that are generated, including the evaluation report and IEP if desired. To enter assessment information:

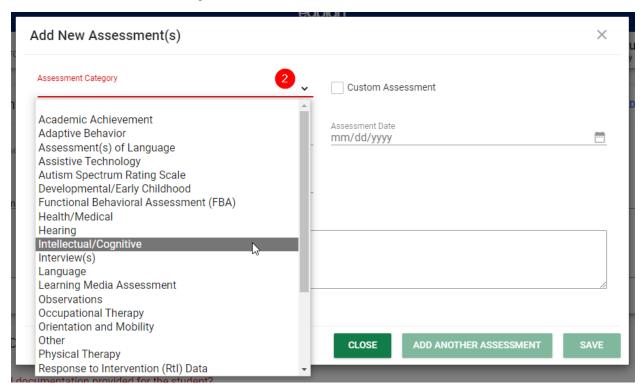
(1) Click on "Add Assessment".



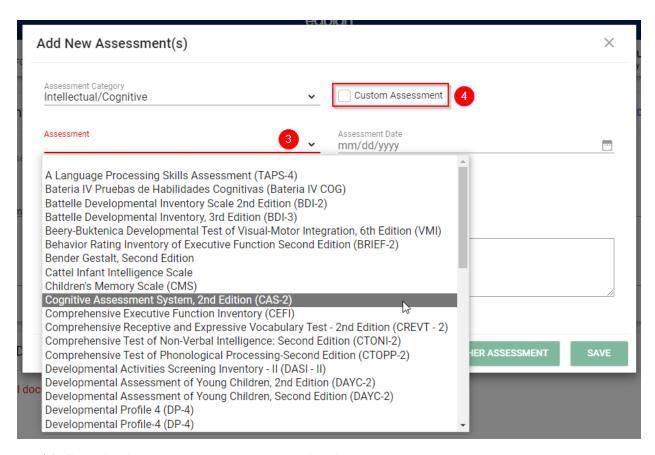
This will bring up the Add New Assessment(s) page.



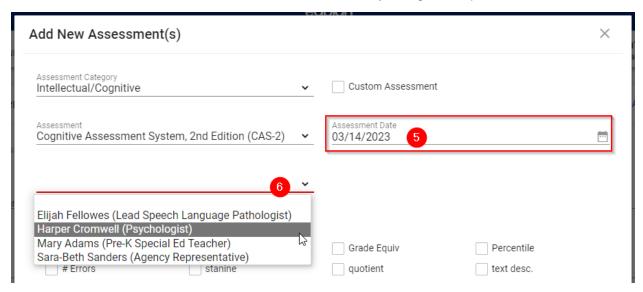
(2) Click on Assessment Category to choose a category from the dropdown list. In this case, the user selected Intellectual/Cognitive.



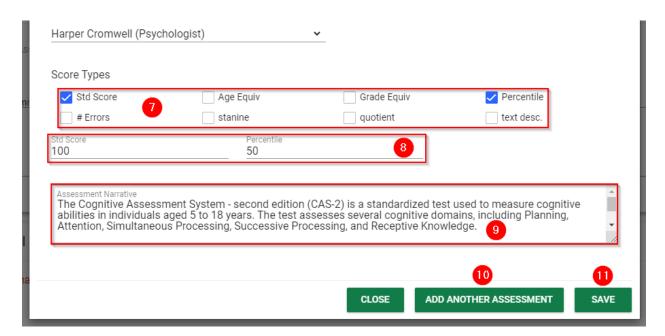
- (3) Click on Assessment to choose the name of the assessment based on the category that was chosen. In this case the user chose the CAS-2.
- (4) If the name is not included in the list, the user has the option to click on Custom Assessment and enter the name of the assessment.



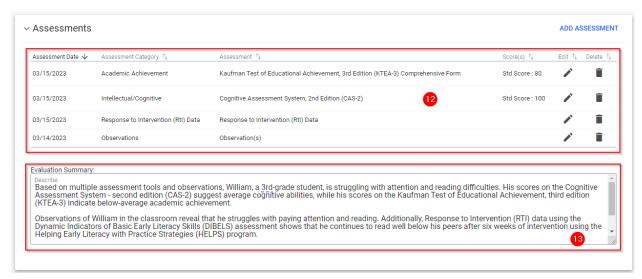
- (5) Enter the date the assessment was completed.
- (6) Select the person who administered the assessment, from a list of users that are associated with the student. In this case Mrs. Cromwell, the School Psychologist, completed the assessment.



- (7) Select the Score Types that should be included.
- (8) Enter the scores for the Score Types selected.
- (9) Enter a short narrative of the results of the assessment.
- (10) Click Add Another Assessment to continue to add results or,
- (11) Click Save to return to the Evaluation Summary Results process.



A table showing all the assessments entered for the student (12) as well as a section to write a summary of the evaluation results is provided (13) in the Assessments section of this process.



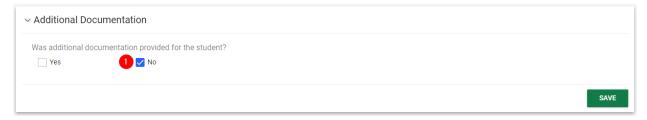
Note that the user must enter assessment information for each category of assessment that was selected during the evaluation planning process. If the user does not enter assessment information for each area of assessment from the consent form an error will appear when they attempt to create the Comprehensive Initial Evaluation Report.



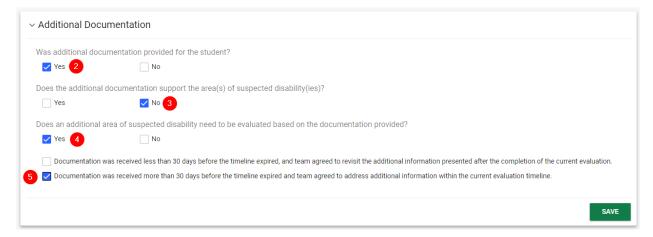
ADDITIONAL DOCUMENTATION

This section gives the user the ability to document information that may be received during the evaluation process.

(1) If additional documentation was not provided for the student during the evaluation process, the user can simply select "No" and move to the next section.

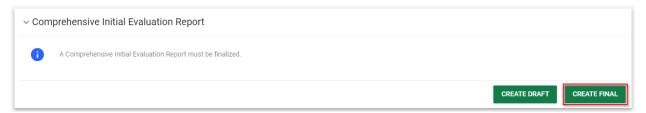


- (2) If additional documentation was provided during the evaluation process, the user can select "Yes".
- (3) The user is asked if the additional documentation supports the areas of suspected disability, chosen during the evaluation planning process. In this case the user selected "No".
- (4) Given that the new documentation in this scenario was not related to the areas of suspected disability, the user is asked if an additional disability is suspected, in this case the user selected "Yes".
- (5) The user documents the decision of the team related to the additional documentation.



COMPREHENSIVE INITIAL EVALUATION REPORT

The user has the option to create a draft of the evaluation report or create a final version of the evaluation report. In this case Mrs. Cromwell has gathered all components of the evaluation and will create a final version of the evaluation report.



After clicking on "Create Final" a PDF version of the evaluation report appears in a new browser window. The report includes a summary table of each evaluation including the Category, Name, Scores, Dates, and Evaluator (1). It also includes the narrative entered on the assessments page (2).



South Carolina District Comprehensive Initial Evaluation Report

Last Name: Saturday	First Name: William	Student ID #: 626744
Date Created: 03/14/2023	Grade: 03	School: Dorchester Elementary School

ASSESSMENTS

Category	Name	Scores	Dates	Evaluator 1
Academic Achievement	Kaufman Test of Educational Achievement, 3rd Edition (KTEA-3) Comprehensive Form	Std Score: 80	03/15/2023	Harper Cromwell (Psychologist)
	Narrative: The Kaufman Test of Educational Achievement, third edition (KTEA-3) is a standardized test used to assess academic achievement in individuals aged 4 to 25 years. The test assesses several academic domains, including reading, math, written language, and oral language. William received a total score of 80 on the KTEA-3, this indicates that his academic achievemen is below average compared to his peers. The total score represents his overall academic achievement across all tested domains, and a score of 80 falls below the average score for his age group.			aged 4 to 25 years. The
2				
It is important to note that the assessment summary should include detailed student's performance on each individual domain, as well as his strengths a information can be used to identify areas where the student may need addit intervention to improve his academic performance.		ths and weaknesses. This		

The report also includes the Evaluation Summary entered on the Add New Assessment(s) page (3), and a section for signatures of each evaluator that participated in the assessment (4).

Evaluation Summary:

Based on multiple assessment tools and observations, William, a 3rd-grade student, is struggling with attention and reading difficulties. His scores on the Cognitive Assessment System - second edition (CAS-2) suggest average cognitive abilities, while his scores on the Kaufman Test of Educational Achievement, third edition (KTEA-3) indicate below-average academic achievement.

Observations of William in the classroom reveal that he struggles with paying attention and reading. Additionally, Response to Intervention (RTI) data using the Dynamic Indicators of Basic Early Literacy Skills (DIBELS) assessment shows that he continues to read well below his peers after six weeks of intervention using the Helping Early Literacy with Practice Strategies (HELPS) program.

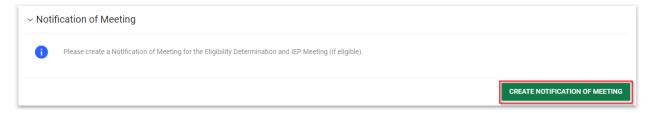
Based on this data, it is recommended that William be considered for eligibility under the category of Specific Learning Disability. Willaim will also benefit from strategies to improve his focus and engagement, specialized instruction to improve his decoding and comprehension skills, and accommodations to support his learning. Ongoing monitoring and assessment will be important to track his progress and adjust interventions as needed.

EVALUATORS

Name	Title	Signature	Date
Harper Cromwell	Psychologist	4	

NOTIFICATION OF MEETING

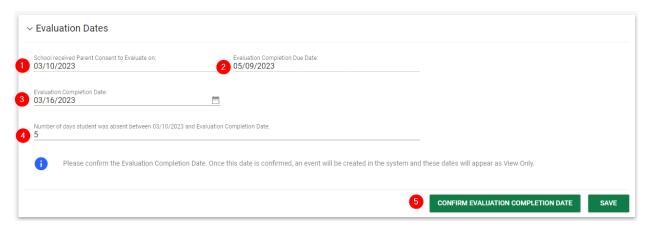
The user is prompted to create a notification of meeting for the Eligibility Determination meeting. They can create this notification by clicking on the "Create Notification of Meeting" button.



More explanation on the steps to create a notification of meeting can be found in [[Insert Location]].

EVALUATION DATES

This section records the date that the evaluation was completed for the purpose of Indicator 11 reporting. The user is shown the date parent consent was received (1), the evaluation due date (2). The user is able to enter the evaluation completion date (3) and the number of days the student was absent during the evaluation (4). Once all information has been entered, click on "Confirm Evaluation Completion Date" (5) to create an event in the system.





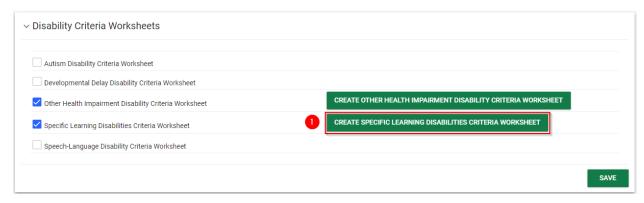
in the upper right part of the screen to move to the Eligibility Determination process.

STEP 4 - ELIGIBILITY DETERMINATION

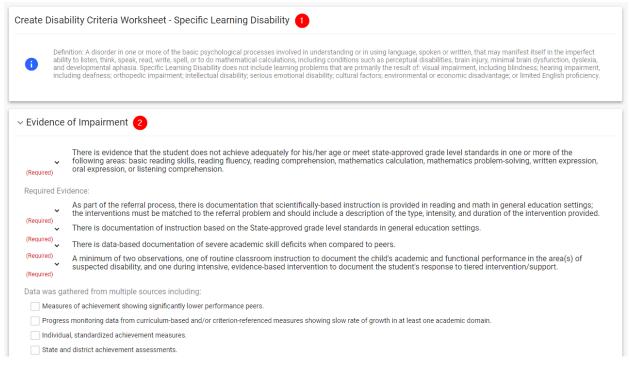
DISABILITY CRITERIA WORKSHEETS

This section allows the team to document information related to the categories of disability suspected. The suspected disabilities selected in the evaluation planning process will automatically be selected. (Note that the demonstration site only has 5 of the 13 disability worksheets)

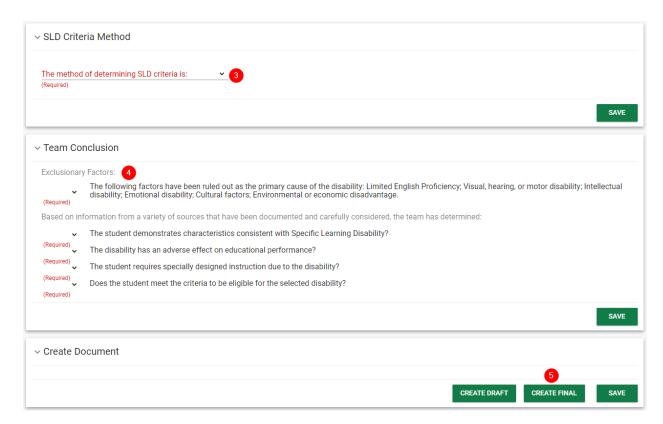
(1) The user can click on the green "Create Specific Learning Disabilities Criteria Worksheet" to create the worksheet.



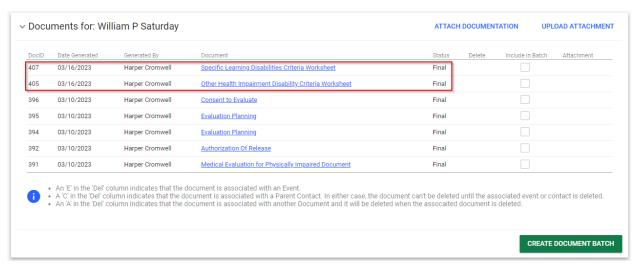
This will take the user to the SLD disability worksheet. This worksheet can be configured according to the most current SCDE guidance and includes a definition of the disability according to the IDEA (1) and ways for the team to document the evidence of impairment based on the disability category selected (2).



For example, the SLD worksheet includes the ability for the user to select the method used to determine the SLD criteria (3) and rule out factors (4). Once the user has made all selections they can click the "Create Final" to create the finalized document (5).



A PDF version of the document is created and is also available in the students documents section back on the Eligibility Determination process page.



STUDENT'S STATUS (IF APPLICABLE)

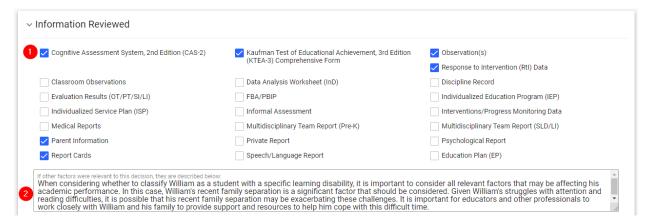
This section is not required during an initial eligibility determination. If the student had transferred with an existing special education eligibility classification the user could check the "Transfer student with existing Eligibility" box (1) and complete the required dates and purpose. The other two check boxes are for cases when partial staffing of a disability is completed (2).



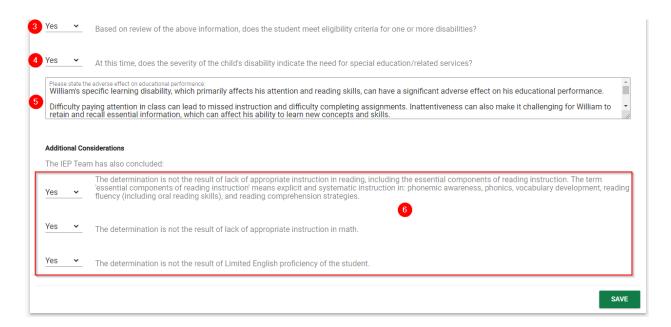
INFORMATION REVIEWED

This section allows the user to document all of the information that was reviewed as a part of the eligibility process and make a determination as to whether or not the student is eligible for special education. The list of information reviewed will include any assessments that were added in the Evaluation Summary Results process.

- (1) Select items from the list that were reviewed as a part of the eligibility conversation. These items will also appear on the prior written notice.
- (2) Describe any other factors relevant to the eligibility decision.

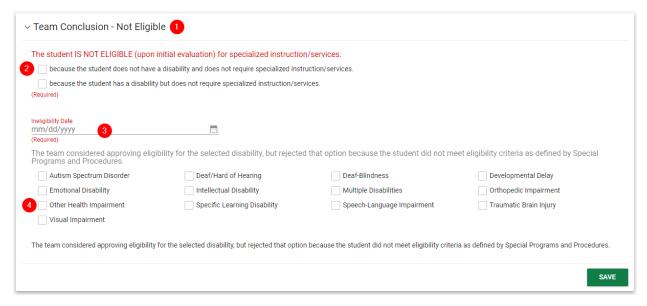


- (3) Use the dropdown to answer the question related to meeting the eligibility criteria, in this case, the answer is "Yes"
- (4) Use the dropdown to answer the question about the need for special education/related services. In this case the answer is "Yes".
- (5) Write a statement about how the disability adversely affects the educational performance of the student.
- (6) The team must also rule out lack of appropriate instruction in reading, math, and limited English proficiency. In this case, use the dropdown to answer "Yes" to all three questions.



TEAM CONCLUSION

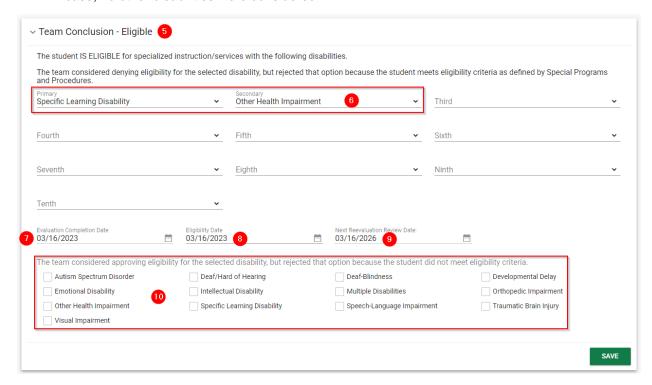
If the answer to any of the above question's is "no" the conclusion would indicate that the student is not eligible (1), the user would be prompted to select a reason (2), enter the date the decision was made (3) and indicate which categories of disability they did not meet eligibility criteria (4).



In this scenario, William is eligible for special education/related services as the user selected "Yes" in the previous steps. In this scenario the team conclusion indicates that the student is eligible (5).

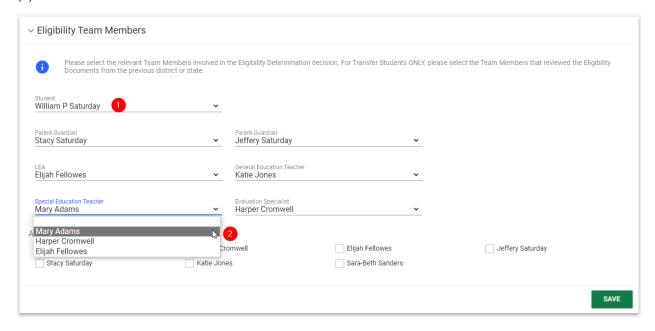
- (6) Select the primary eligibility category and if necessary the secondary eligibility category. In this scenario, William is eligible as SLD primary and OHI secondary.
- (7) The date the evaluation was completed will automatically be filled based on the information entered in the Evaluation Summary Results process. If it does not show it is likely that the user did not click the "Confirm Evaluation Completion Date" in the evaluation dates section.
- (8) Enter the date the eligibility was determined.
- (9) The next reevaluation review date is automatically determined based on the evaluation completion date.

(10) Select any other disabilities that were considered, but rejected as a part of the evaluation. In this case, no other disabilities were considered.



ELIGIBILITY TEAM MEMBERS

The user can select the members of the team that participated on the eligibility team. In this case, the student, William, participated (1). Use the dropdown to select all members of the team that participated (2).

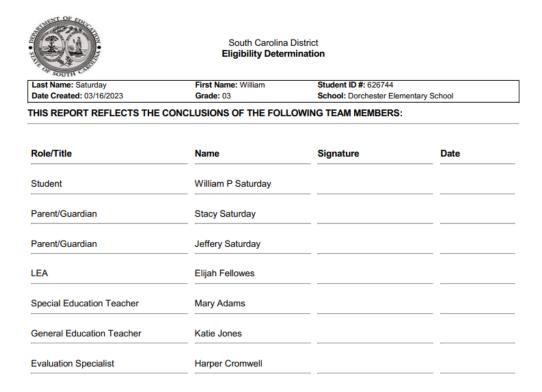


CREATE ELIGIBILITY DETERMINATION DOCUMENT

Team members selected in the previous step will show up on the Eligibility Determination Document for signatures. To create this document, click "Create Final" (1).

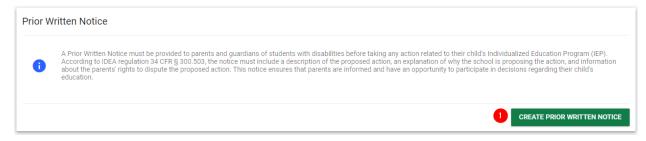


A PDF version of the Eligibility Determination document has been created that includes all of the information entered as a part of this step. The screenshot below depicts the signature page for this document.

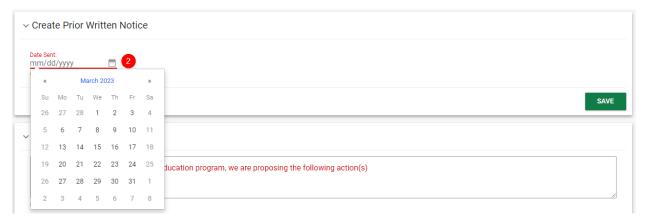


PRIOR WRITTEN NOTICE

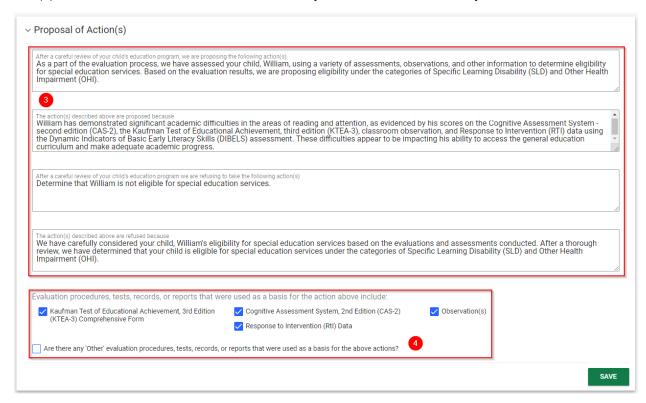
The final step in the process is to create the Prior Written Notice. The user can simply click on the "Create Prior Written Notice" button (1) to be taken to the document creation page.



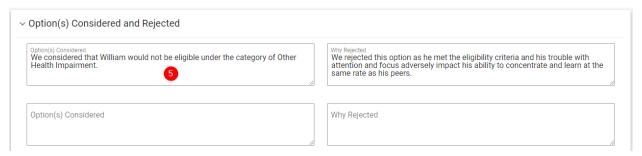
(2) Enter the date for the Prior Written Notice.



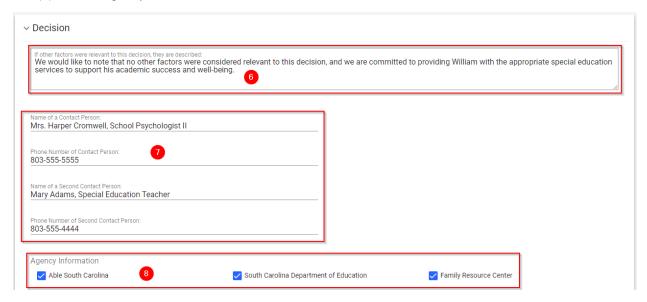
- (3) Enter the proposed actions.
- (4) Select the assessments used and enter any "other" items as necessary.



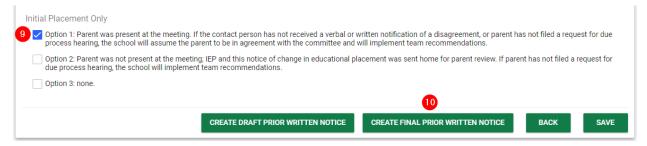
(5) Enter as many options considered and why they were rejected as necessary. At least one is required.



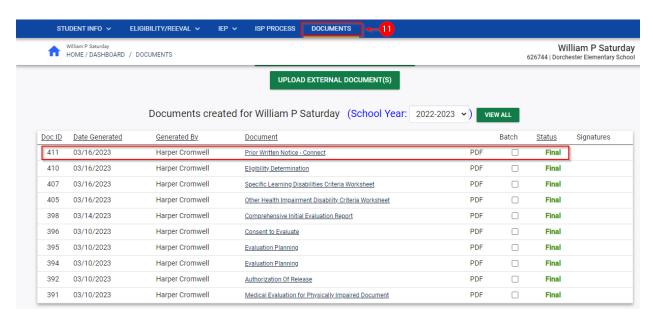
- (6) Enter any other factors that were considered relevant to the decision.
- (7) Enter the names and phone numbers of LEA contacts.
- (8) Select Agency information to include in the PWN.



- (9) Select the appropriate option, in this case we will select Option 1.
- (10) Click the "Create Final Prior Written Notice" to create the PWN.



A PDF of the PWN opens in another window. This document will now also appear in the students Documents page that can be accessed from the top menu (11).



That completes the Initial Eligibility process in EDPlan. If the user selects the Eligibility/Reeval page from the top menu (12), they will be able to see the completed sections in green (13). They will also see that from this page they can go to the next actions which include drafting the IEP (14) and obtaining Consent for Initial Provision of Services (15).

