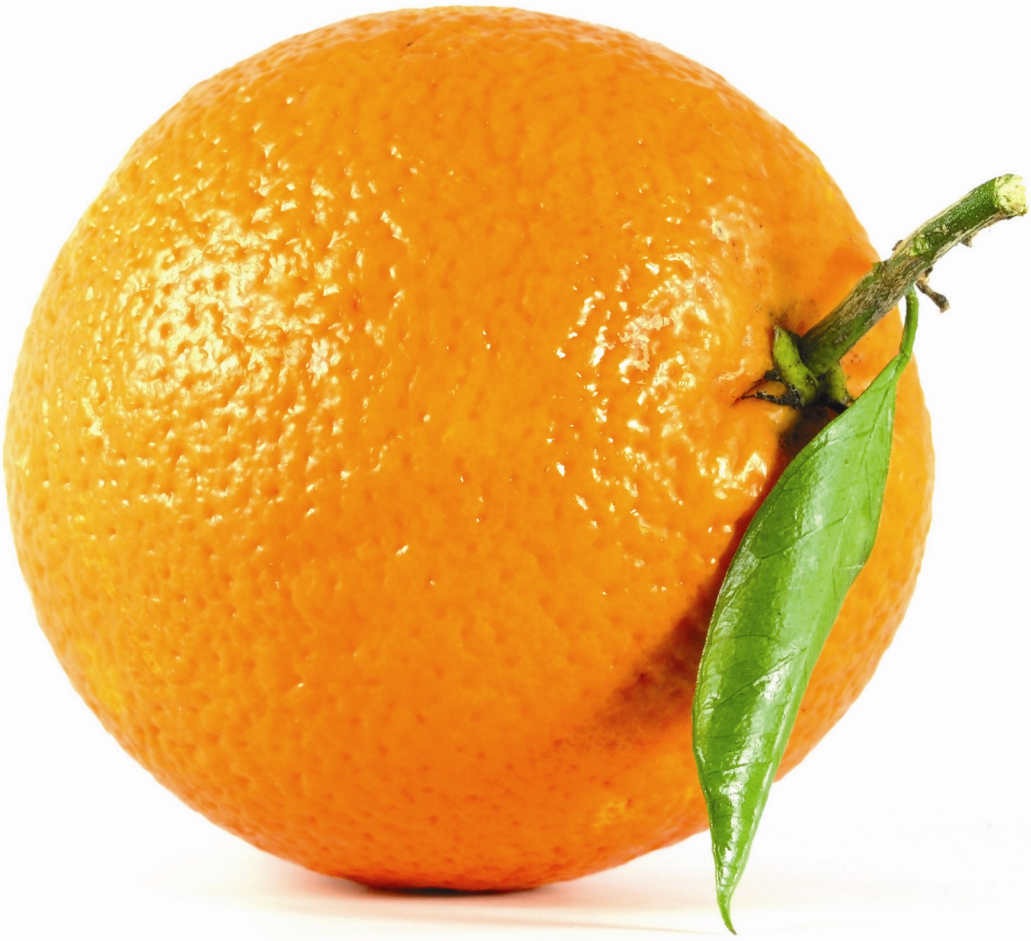
EDPlan Paperless

End User Manual



PUBLIC CONSULTING GROUP

Public Focus. Proven Results.™

EDPlan Paperless

Table of Contents

Table of Contents **1**
EasyFax™ **2**
What is EasyFax™? 2
Creating Documents in OK EDPlan™ 3
Received Faxes in OK EDPlan™ 4
Troubleshooting Unrecognized Faxes 5
SmartScan **6**
Digital Signature **9**

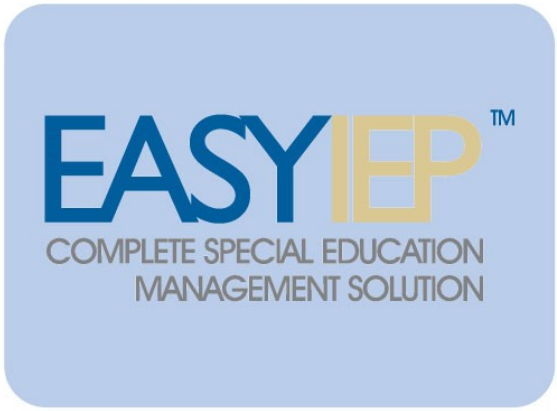
Your EasyFax™ number is: _____

EasyFax™

What is EasyFax™?

EasyFax™ provides an easy way for OK EDPlan™ users to convert paper documents into electronic (PDF) documents via a fax machine and store them in a student's electronic OK EDPlan™ record.

EasyFax™ documents are documents that are generated within the OK EDPlan™ system. These are usually the signature pages of documents such as the IEP and Parent Consent letter. These documents will have a bar code on the page when the PDF is generated. Only documents with barcodes on them may be faxed in to the OK EDPlan™ system.



Step 1: Create, Review, and Finalize the IEP in EASYIEP™.

Step 2: Print out signature page in EASYIEP™ or fax cover sheet for information to store electronically.

Creating Documents in OK EDPlan™

After logging into the system, you will be taken to the "Main Menu" of OK EDPlan™. Enter the student record and access the "Documents" page.

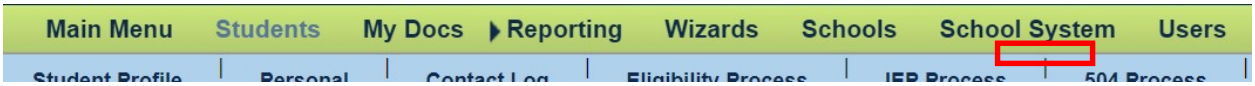


Figure 1

The "Documents" page allows you to create various types of documents and letters. You can select the type of document you would like to create by clicking on the radio button next to the name of the document or letter.

Documents requiring signatures are typically the documents that will be faxed into the system, such as the IEP signature page and meeting invitation.

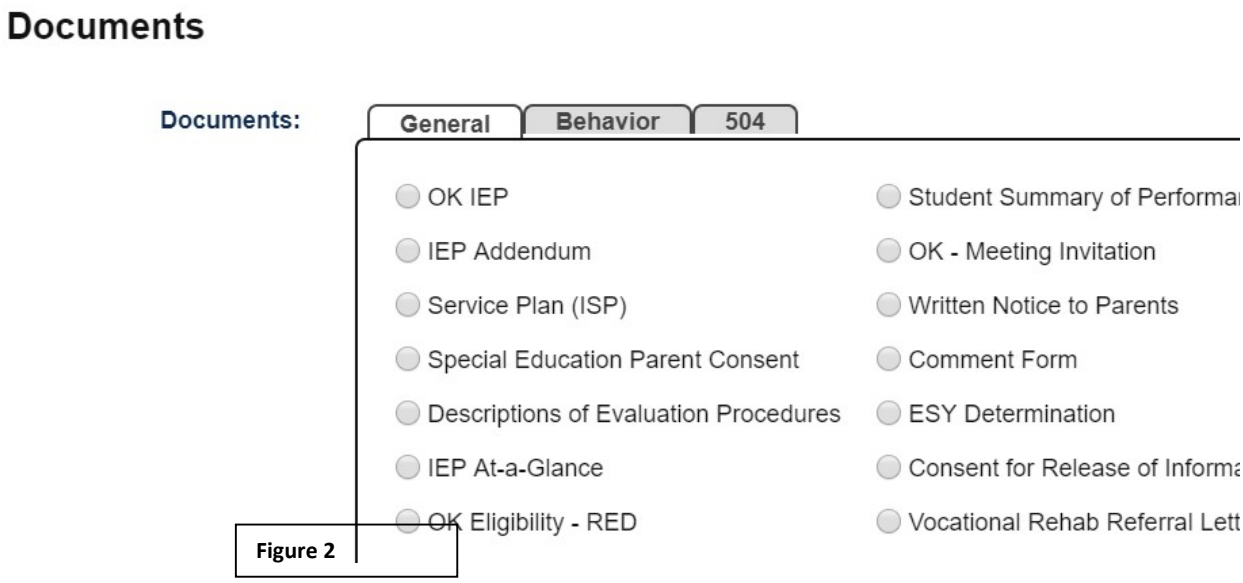


Figure 2

The signature page of the IEP should be printed, the signatures should be obtained, and the page should be faxed into the district-specific EasyFax™ number.

Received Faxes in OK EDPlan™

After the page is faxed in, it will go directly to the appropriate student's "Documents" page. You will see that the date the fax was completed appears in the *Date Received* column. The figure below shows the student's document page after EasyFax™ has received the document.

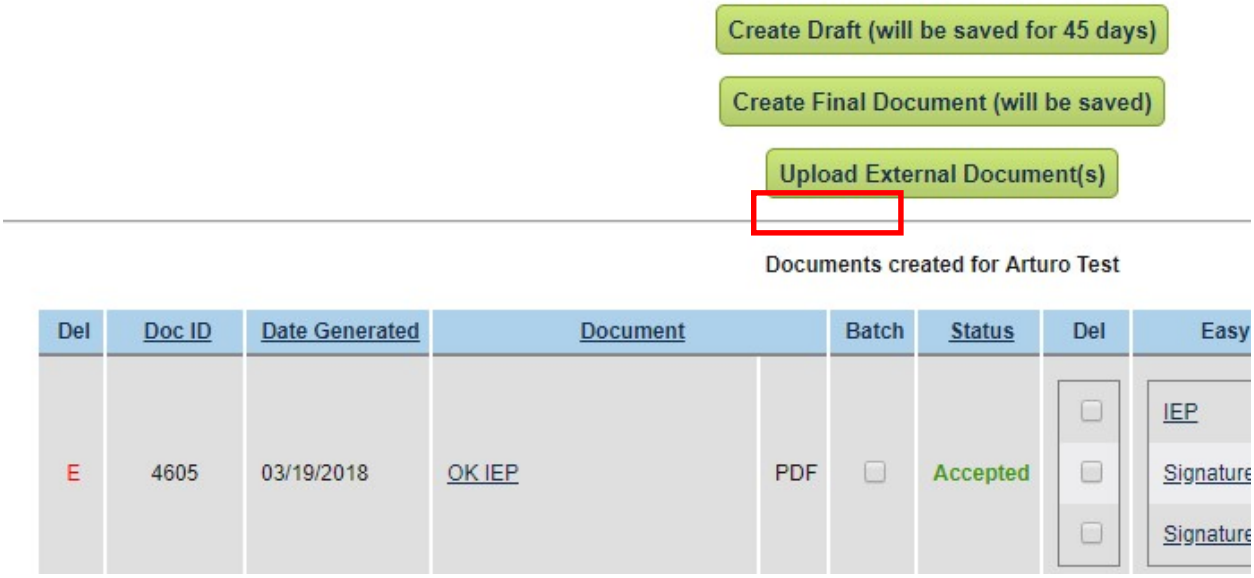


Figure 1

Troubleshooting Unrecognized Faxes

Sometimes EasyFax™ faxes cannot be correctly associated to a student because some part of the fax is unreadable. The majority of these instances are due to an unrecognized barcode. This may be because the barcode is blurry or distorted, or there may be other marks or defects obstructing the barcode.

***Note: The most common issues that cause faxes to be unreadable are:**

- **a user may not have set the fax machine to the highest resolution possible**
- **a copy of a document was faxed instead of the original (original documents should always be faxed because copies lack quality resolution)**
- **correction fluid used on previous documents transferred from the fax machine to the barcode**
- **problems with the fax machine itself**

Figure 4 shows an example of a barcode that will not be recognized by OK EDPlan™. In this example, the fax machine created a black streak through the page, which makes the barcode unreadable.

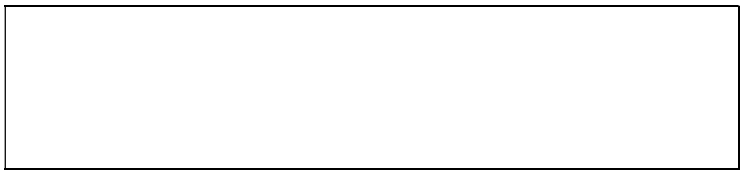


Figure 2

When faxing, you must have the page with the barcode as the first page of the fax. Any pages behind the barcode will be associated with the student record from which the EasyFax™ document was created. When EasyFax™ sees another barcode, it assumes that this is either a new document and/or a new student.

After faxing in a document, it should be available in the student's record within a few minutes. In order to view the faxed pages, you must click on the "Documents" tab again to refresh your browser.

SmartScan™

What is SmartScan™?

SmartScan™ provides an easy way for OK EDPlan™ users to convert paper documents into electronic (PDF) documents via a scanner and store them in a student's electronic OK EDPlan™ record.

Creating Documents in OK EDPlan™

After logging into the system, you will be taken to the "Main Menu" of OK EDPlan™. Enter the student record and access the "Documents" page.

Figure 1

The "Documents" page allows you to create various types of documents and letters. You can select the type of document you would like to create by clicking on the radio button next to the name of the document or letter.

Documents requiring signatures are typically the documents that will be scanned into the system, such as the IEP signature page and meeting invitation.

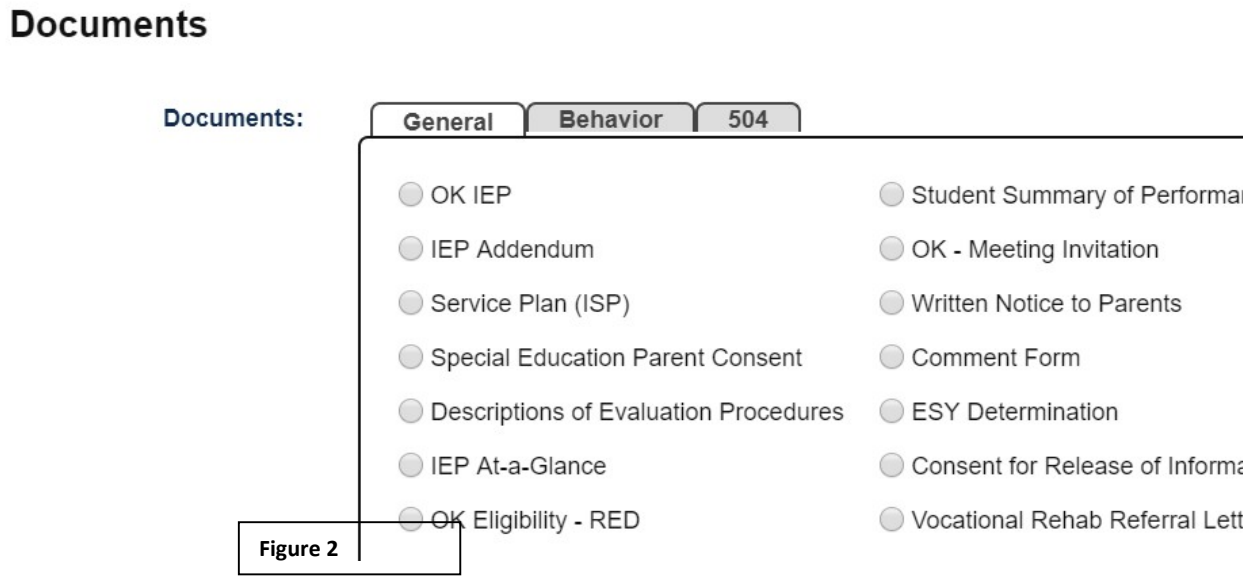


Figure 2

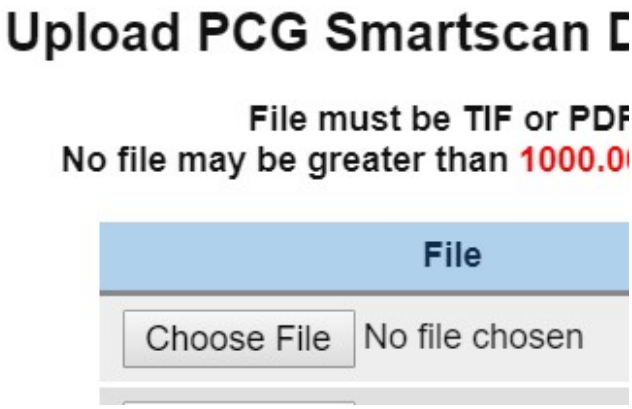
The signature page of the IEP should be printed, the signatures should be obtained, and the page should be scanned and uploaded into OK EDPlan™.

Uploading a document using SmartScan

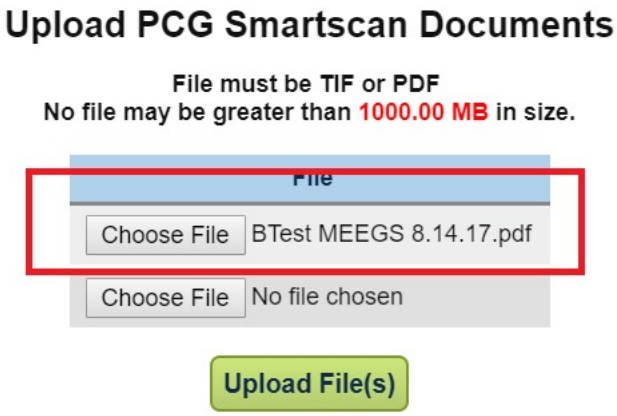
SmartScan works much like EasyFax, generating a bar code specific to that student on the document. After signatures have been obtained on the document, scan the document and save it to your computer.

Select SmartScan on the Main Menu.

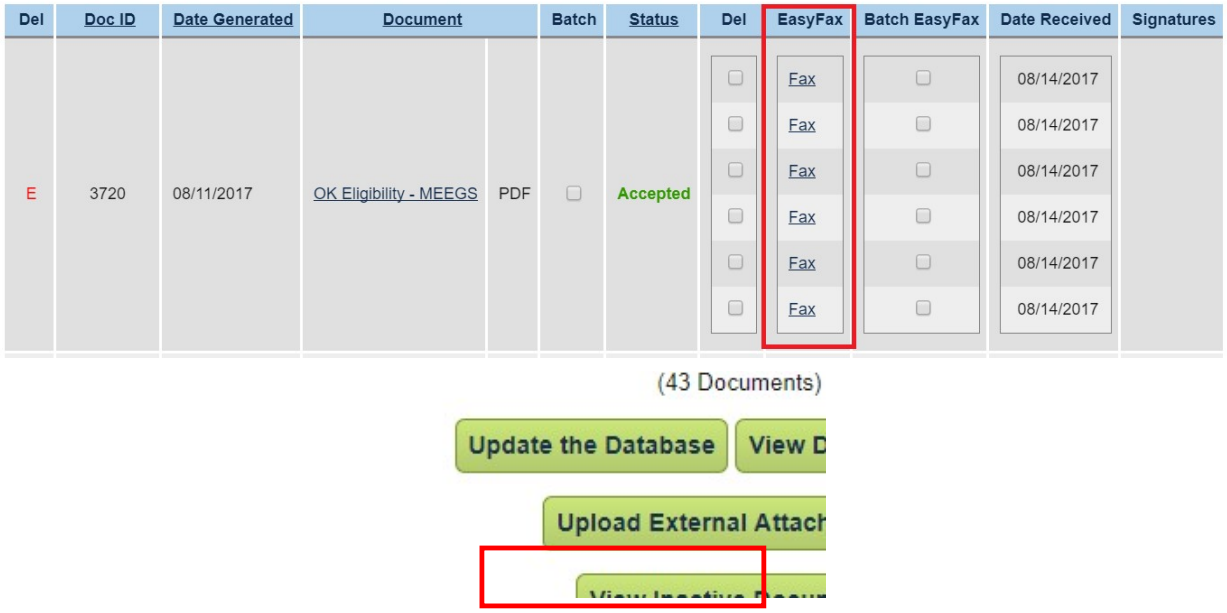
Choose the file to be uploaded. The bar code on the document is specific to that student. It is the link between the student and the document, and is what allows the document to be routed automatically to the student's records.



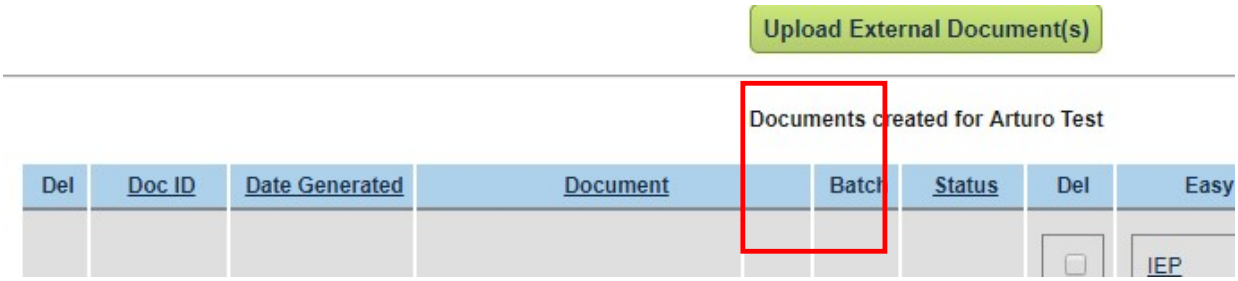
Select the file that has been scanned and saved to your computer.



The files you scanned will be shown in the documents section for that student.



Note: Each page of the document that has a barcode on it will create its own entry line on the Documents page. For example, the IEP and MEEGS documents have a barcode on the first page as well as each signature page, in case users only wanted to upload the signature pages. Users with the appropriate permissions may edit the label of each page that uploaded. The uploaded documents will default to be labeled 'Fax,' but you may click 'Change Fax Labels' to re-name the pages to be more descriptive, such as the following example:

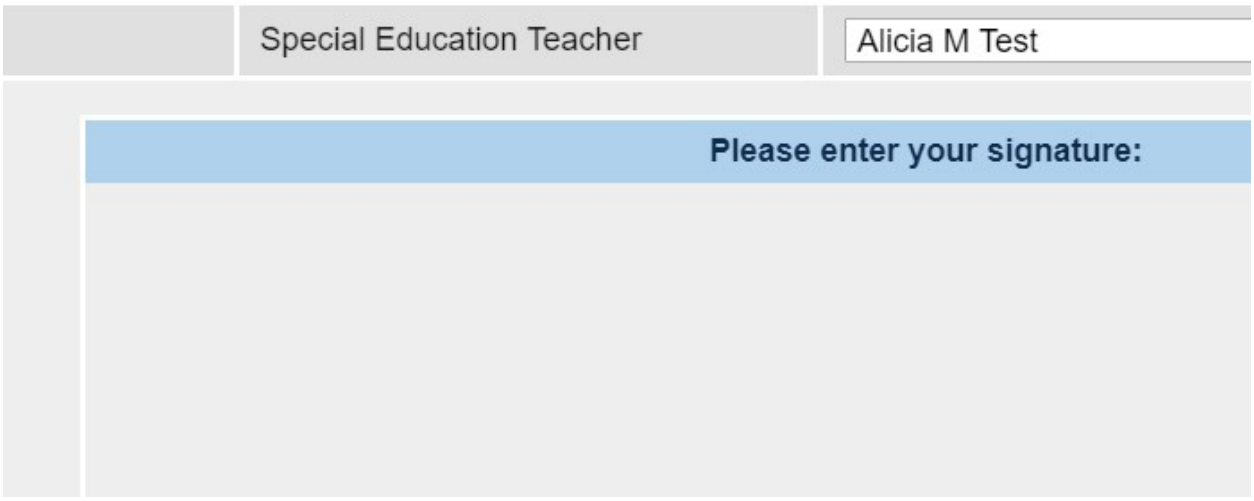


Digital Signature

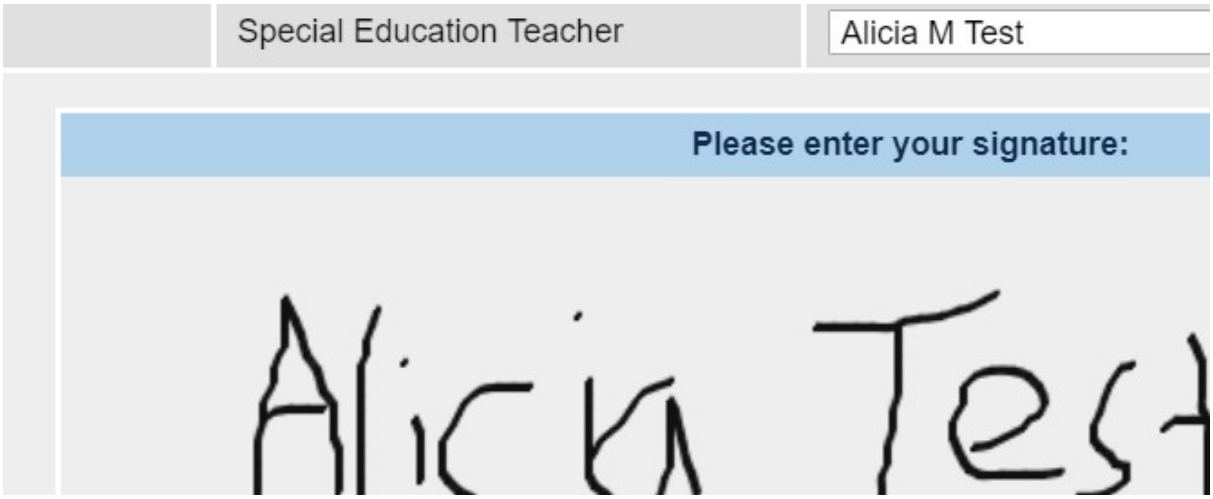
What is Digital Signature?

Digital Signature allows team members to sign documents directly on the computer or tablet. Signatures may be entered using a mouse on a normal computer, or on a touch screen computer or tablet with a finger or stylus..

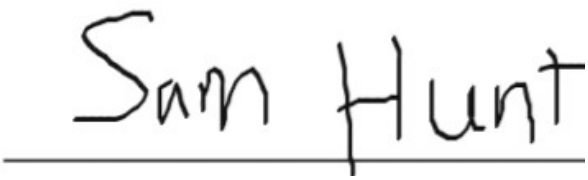
Each document that allows for digital signature will display a signature box for each Team Member on the Create Final page.



The team member will sign in the box.



The signature will go directly to the PDF of the document when the final draft is created, as seen below.

Position	Team Participant Signatur
Parent/Guardian	
Special Education Teacher	
General Education Teacher	

Note: Digital signatures do not save to the workspace page for security reasons. So, signatures should be entered AFTER checking the document for errors, and as the final step before the team is ready to click 'Create Final.' If users enter signatures, then click Create Draft, Create Final, or Save, the workspace page they return to will have cleared out the signature boxes, and the document created will show the signatures.

www.publicconsultinggroup.com