

Planning

Overview

Different plan types (e.g. reevaluation, review) are tracked via the Plan module. The Plan screen (AEPLF) records information about meeting date, district wide assessment and percent of time not in general education.

Prior to August 2007, the Review module was used to record information about meetings held to discuss plans. The Review file (AEMEF) recorded information about each meeting conducted on a child/youth's behalf. Data are no longer entered into the Review module. The data entered in this module may be viewed via a button on the Plan screen.

This section of the manual addresses both of these modules.

Uniform Data Entry Procedures

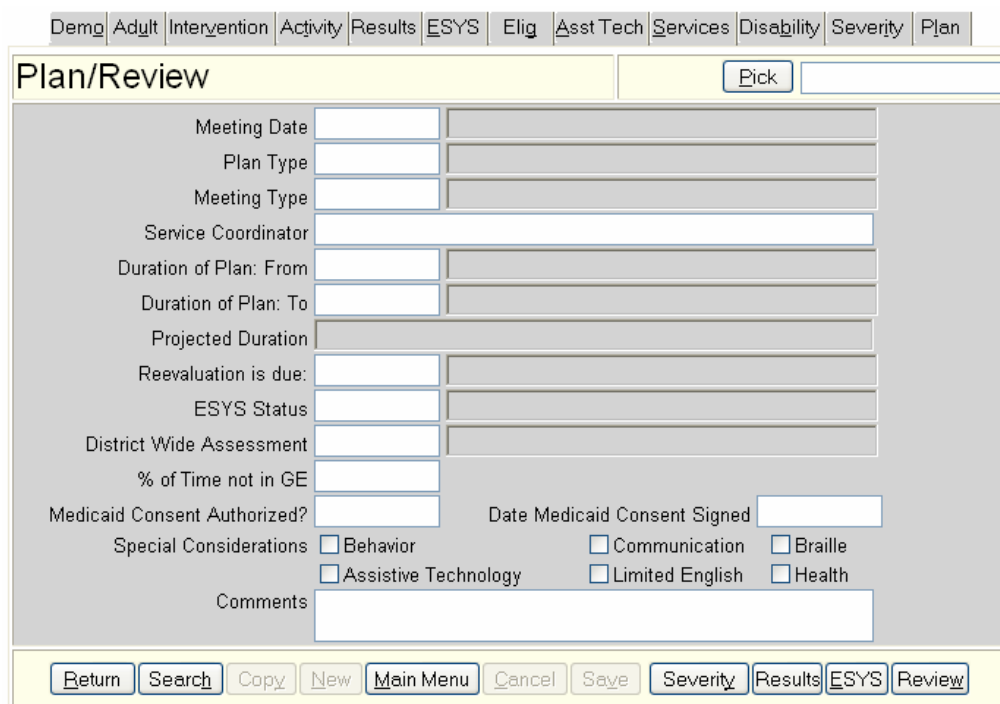
At this time, the following Uniform Data Entry Procedure is related to the Plan screen:

- Plan

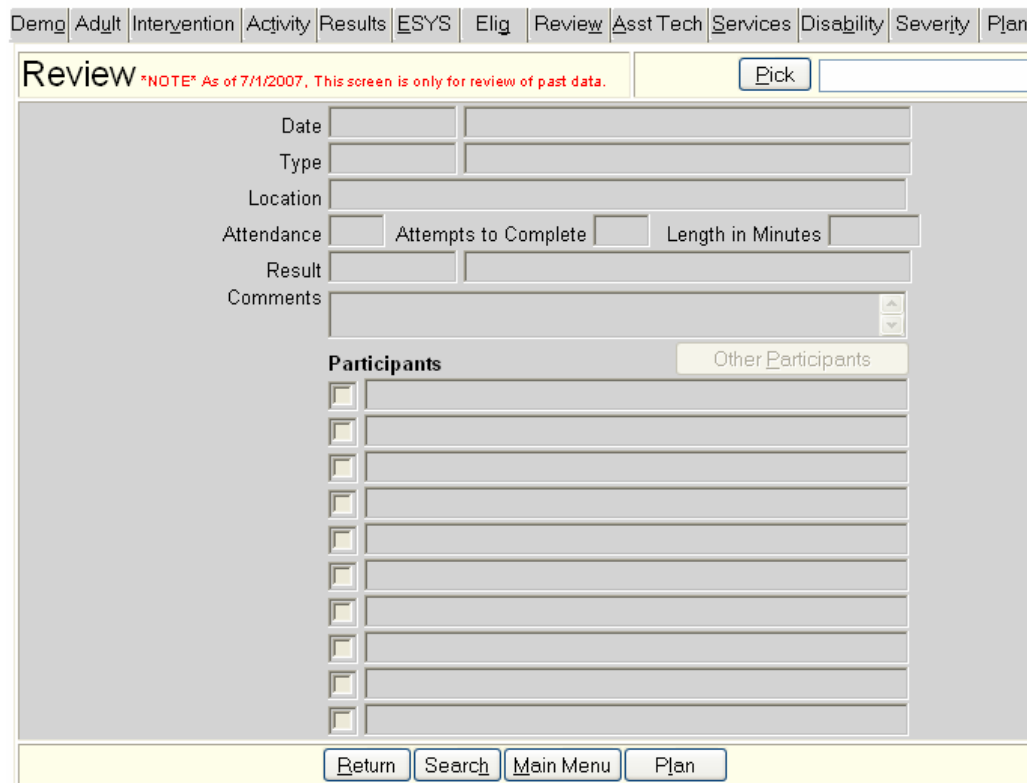
If an AEA believes there is a reason to diverge from a Uniform Data Entry Procedure, please contact the DE before initiating any changes.

Access to Screens

From the Main Menu, select Planning under the Child section or select the Plan tab from any other screen.





The review screen may be accessed only by clicking on the Review button on the Planning screen.



Add a Plan



When entering any Plan, only a few fields are required for state or federal reporting purposes. With the exception of the required fields, the following steps are suggested:

Initial, Review, Reevaluation and Interim

1. Access the Child Demographic screen.
2. Press the Plan button. 
3. Press the New button. 
4. Enter the Meeting Date.
5. Enter the Plan Type.
6. Enter Meeting Type.
7. Enter the Service Coordinator's name.
8. Enter the Duration of Plan From and To Dates.
9. Enter the Reevaluation is due date.
10. Enter the ESYS Status.
11. Enter the District Wide Assessment.
12. Enter the % of time not in GE.
13. Enter the Medicaid Consent Authorized and the Date the Consent was signed.
14. Enter the Special Considerations. (Optional)
15. Click on the Return button.

Amendment

1. Access the Child Demographic screen.

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2. Press the Plan button. 
 3. Choose, via the Search button, the Plan that is being amended.
 4. Press the Copy button. 
 5. Change data, as appropriate.
 6. Click on the Return button.
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