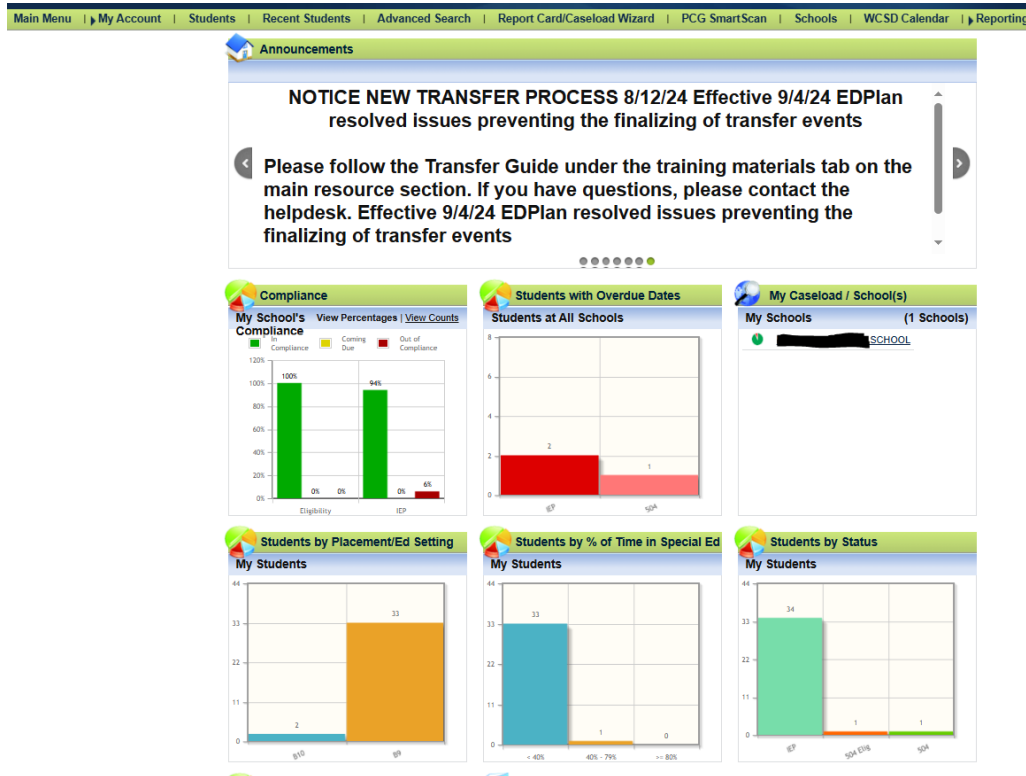


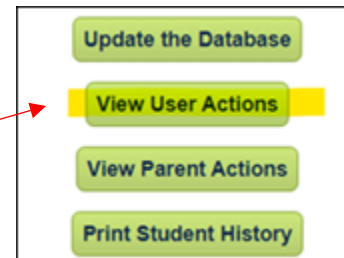
EDPLAN AT-A-GLANCE FOR ADMINISTRATORS

Tip #1: Reviewing the main menu for compliance at your site



Tip #2: Viewing student activity

1. Search up the student
2. Go to "Student History" page
3. Scroll down to the bottom of the page and click "View User Actions"
4. Select the parameters you would like, and click "Show User Actions"



User

The screenshot shows the 'View User-Student Actions Criteria' form. It includes fields for 'Begin Date' (01/12/2023), 'End Date' (02/12/2023), 'Activity' (All), 'Page' (All), 'All Accesses' (checked), 'Service Logs' (checked), 'Primary Sort' (Date), and 'Secondary Sort' (Date). A red arrow points from the 'Show User Actions' button in this form to the 'View User Actions' button in the menu above.

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Tip #3: How to check for related service logs for a student

The **Smart Logbook** report can be accessed from the green menu bar.

G SmartScan | Smart Logbook | ► Reporting |

Smart Logbook allows you to view the logs from a single Student or all the Students for which you have logged services. You can also view logs of services logged by other users in your provider type IF the student is on your caseload. School Site Administrators will be able to view logs for all students enrolled at their site. To run the report, you would select search criteria from the options provided based on the data you are looking for:

Select a Date Range to View

☒ Use Date of Service (date service was provided) for selection date range

☐ Use Date Service was entered into system for selection date range

☐ Today ☐ Last Week

☐ Yesterday ☐ This Month (January)

☐ This Week ☐ Select Month: December 2023

☐ Date Range

: Begin [] [] End [] []

Search for date range

☐ Show logs from all users

The system will only allow you to View and Create reports that have 200 or less logs. In the case that you want immediate data, adjust the criteria as need. For example, you can shorten the date range and run multiple reports to compile all the data. If you want a single report, you can run the report overnight. You'll receive an email once the report is ready. **Note: This report will exclude logs that have been deleted or rejected. It will include logs that are pending approval.**

133167 logs would be displayed (Max is 200).

Please narrow your search or schedule this as an overnight report using the button below.

Run Report Tonight

Run Detailed Report Tonight

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1. Select how the date range pulls up saved logs.

Option 1:

- ☒ Use Date of Service (date service was provided) for selection date range
☐ Use Date Service was entered into system for selection date range

Option 2:

- ☐ Use Date of Service (date service was provided) for selection date range
☒ Use Date Service was entered into system for selection date range

2. Select your preference for the Date Range



Option 1: a set range by selecting one of these

- If you use this option, you will see the results adjust as you select a different circle

- ☐ Today ☐ Last Week
☒ Yesterday ☐ This Month (February)
☐ This Week ☐ Select Month: January ▼ 2023 ▼

Option 2: setting a specific date range

- If you use this option, you will need to click **Search for date range** after you have entered your date range.

☒ Date Range
: Begin  End 

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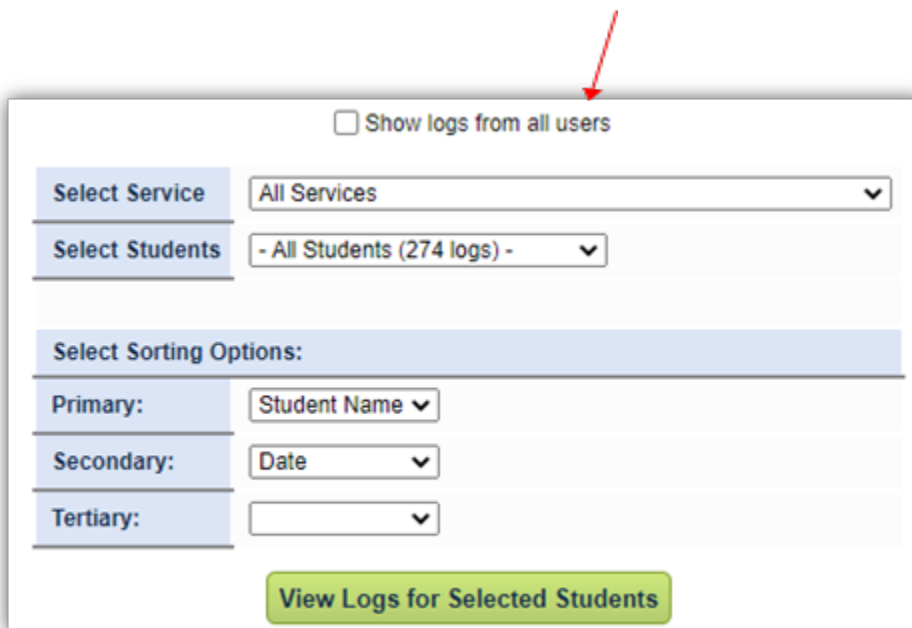
A new set of filters and sorting options will appear. After you have selected your filter and sorting options, click **View Logs for Selected Students**.

Select Service: this list will contain the name/s of the services you can provide

Select Students: this list will contain all the students for which you have logged a service in the date range you selected.

Please note you must select show logs from all users

☒ Show logs from all users



☐ Show logs from all users

Select Service: All Services ▼

Select Students: - All Students (274 logs) - ▼

Select Sorting Options:

Primary: Student Name ▼

Secondary: Date ▼

Tertiary: ▼

View Logs for Selected Students

Select from the options provided to move forward

Details: expand the details for that specific log

Show More Detail: expand the details for all the logs

Back to Criteria Select Screen: return to the previous screen to adjust search criteria as needed

Create PDF Report for this Data

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Log ID	Student Name	Service	Provider	Date Provided	Date Logged	Duration of Service	
26557	WashoeFake 11 Eleven	Direct Nursing Services	Jeanette Verdin	09/23/2022	09/23/2022	1:00	Details
88686	WashoeFake 11 Eleven	Speech/Language Intervention	Jeanette Verdin	12/06/2022	12/07/2022	0:30	Details
88691	WashoeFake 11 Eleven	Speech/Language Intervention	Jeanette Verdin	12/06/2022	12/07/2022	0:30	Details
88693	WashoeFake 11 Eleven	Speech/Language Intervention	Jeanette Verdin	12/06/2022	12/07/2022	0:30	Details
98383	WashoeFake 11 Eleven	Speech/Language	Jeanette Verdin	12/13/2022	12/16/2022	1:00	Details
8389	WashoeFake 15 Fifteen	Speech/Language	Jeanette Verdin	08/15/2022	09/01/2022	0:10	Details
8388	WashoeFake 15 Fifteen	Speech/Language	Jeanette Verdin	08/29/2022	09/01/2022	0:15	Details
14129	WashoeFake 15 Fifteen	Speech/Language Intervention	Jeanette Verdin	09/08/2022	09/08/2022	0:15	Details
46241	WashoeFake 15 Fifteen	Speech/Language	Jeanette Verdin	10/19/2022	10/20/2022	0:15	Details
48829	WashoeFake 15 Fifteen	Speech/Language	Jeanette Verdin	10/21/2022	10/24/2022	1:00	Details
48832	WashoeFake 15 Fifteen	Speech/Language	Jeanette Verdin	10/21/2022	10/24/2022	0:30	Details

[Back to Criteria Select Screen](#)
[Show More Detail](#)

[Create PDF Report of this Data](#)

Additional View Option:

☒ Show logs from all users

To also view logs of services logged by other users, check the “Show logs from all users” box. The permissions for the Smart Logbook “Show logs from all users” only allows

you to **view logs from users with your same provider type IF the logs are for students who are also on your caseloads**. For example, if you provide SLP services, you will not see logs for OT services even if the student is on your caseload. You will only see SLP serviced logged by other users. When you check this box, you may receive the message below. Select **Leave**. You will see a new filtering option appear.

Leave site?

Changes you made may not be saved.

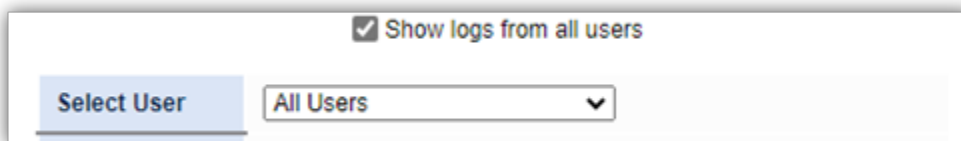
Leave

Cancel

Select User: This list will show all the users who access to log ANY service in the system. It does not indicate the users who have logged services in your same provider type category for students on your caseload. If a user is no longer active in the system, you will need to filter by student instead user.

Adjust the filters/sorting options as needed and click **View logs for Selected Students**. To view all the logs for the student no matter who provided the service, leave the **Select User** filter as **All Users**.

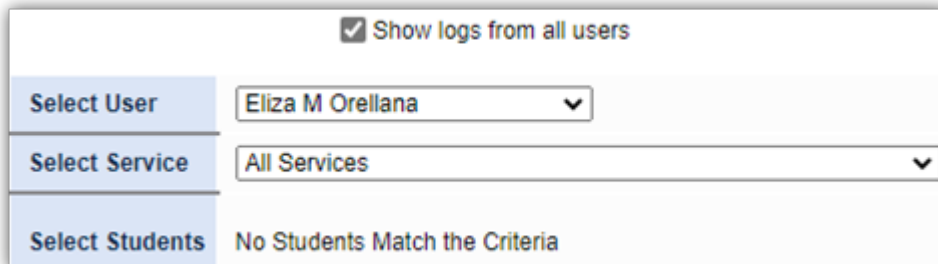
EDPLAN AT-A-GLANCE FOR ADMINISTRATORS



☒ Show logs from all users

Select User: All Users

If you select a user who is NOT the same provider type AND/OR has NOT logged services for students on your caseload, you will get this result.



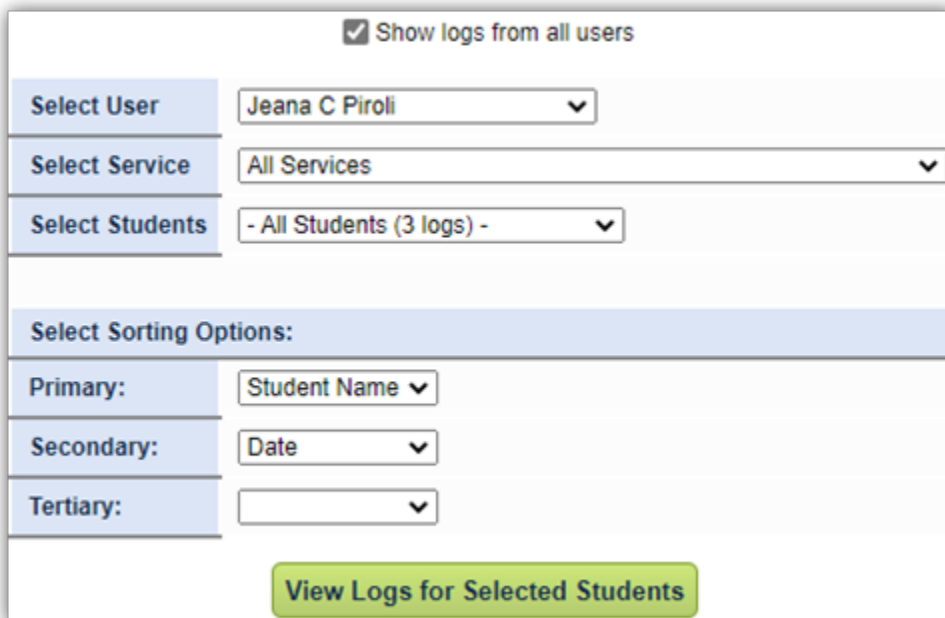
☒ Show logs from all users

Select User: Eliza M Orellana

Select Service: All Services

Select Students: No Students Match the Criteria

If you select a user IS the same provider type as your AND HAS logged services for students on your caseload, you will get this result.



☒ Show logs from all users

Select User: Jeana C Piroli

Select Service: All Services

Select Students: - All Students (3 logs) -

Select Sorting Options:

Primary: Student Name

Secondary: Date

Tertiary:

View Logs for Selected Students

Advanced Student Search

Please check the box at the top to ensure you are looking at data from a finalized IEP and not the workspace

EDPLAN AT-A-GLANCE FOR ADMINISTRATORS

The screenshot shows the EdPlan interface. The top navigation bar includes the EdPlan logo, a search bar, and links for 'Welcome, Jeana', 'My Calendar', 'Message Board', and 'Logout'. Below this is a secondary navigation bar with links for 'My Account', 'Students', 'Recent Students', 'Advanced Search' (highlighted with a red box), 'Service Documentation', 'PCG SmartScan', 'Smart Logbook', 'Reporting', 'Admin', 'My Calendar', and 'Log Off'. The main content area is titled 'Criteria for Selecting Students to View' with a 'New Mail' icon. A red box highlights a checkbox labeled 'Search for Students using the information from the Current IEP rather than the Workspace' with a note: 'NOTE: School and Grade will be based upon current Student information when searching.' Below this is a 'Grade Level' section with a 'Check All' button and a 'Check None' button. The 'Grade Level' section contains a grid of checkboxes for various grade levels: Infant (Ages 0, 1, & 2 ONLY), 1st Grade, 5th Grade, 9th Grade, 12+ Grade / Transition, PreSchool (Ages 3 through 5 ONLY), 2nd Grade, 6th Grade, 10th Grade, Ungraded, Kindergarten, 3rd Grade, 7th Grade, 11th Grade, Adult, Kindergarten - DK, 4th Grade, 8th Grade, and 12th Grade.

Missing Progress Reports

The screenshot shows the EdPlan interface. The top navigation bar includes the EdPlan logo, a search bar, and links for 'Welcome, Jeana', 'My Calendar', 'Message Board', and 'Send Us a Message'. Below this is a secondary navigation bar with links for 'Students', 'Recent Students', 'Advanced Search', 'Report Card/Caseload Wizard', 'PCG SmartScan', 'Schools', 'WCSO Calendar', 'Reporting' (highlighted with a red box), 'Smart Logbook', and 'Log Off'. The main content area is titled 'Reports' with a 'New Mail' icon. Below this is a 'Scheduled Reports' section. A red box highlights the 'General Admin' tab, which is selected. Below the tabs is a link labeled 'Missing Progress Report (.xls)'.