Assigning Yourself to an IEP Team
Related Services

LOCATING STUDENTS WITH SERVICES AT SCHOOLS
☑ Related Service Provider accesses EDplan.
☑ Click “STUDENTS” – then scroll to the bottom of the page.
☑ Click “ADVANCED STUDENT SEARCH”.
☑ Choose your school from “SCHOOL” drop down.
☑ Click the checkbox “STATUS” to indicate “SPECIAL EDUCATION”.
☑ Scroll down to “RELATED SERVICES” and check the services you are responsible for.
☑ Click “View Students”
☑ Then click “EXPORT SEARCH RESULTS”
☑ Open the file (sometimes a warning about formatting comes up – click “ok”)

ASSIGNING YOURSELF TO AN IEP TEAM
☑ Using the Excel Spreadsheet you just created, go back to EDplan.
☑ Click the student’s name in the list (or find the student if you closed the window)
☑ Click “STUDENT INFO” in the blue ribbon near the top of the page.
☑ Use the dropdown list to choose and click on “TEAM”
☑ Click “SELECT IEP TEAM”
☑ Locate your name in the list and check the box to the left of your name.
☑ Scroll to the bottom of the page and click “UPDATE THE DATABASE”
☑ I use my browser’s back button to bring the large list up – and repeat as necessary on the next student.

REMOVE YOURSELF FROM AN IEP TEAM
☑ Click “STUDENTS” – then scroll to the bottom of the page.
☑ Click “VIEW MY CASELOAD”
☑ Click the student’s name in the list (or find the student using search feature)
☑ Click “STUDENT INFO” in the blue ribbon near the top of the page.
☑ Use the dropdown list to choose and click on “TEAM”
☑ Click “SELECT IEP TEAM”
☑ Locate your name in the list and UN-check the box to the left of your name.
☑ Scroll to the bottom of the page and click “UPDATE THE DATABASE”

CONFIRM YOUR CASELOAD
☑ Click “STUDENTS” – then scroll to the bottom of the page.
☑ Click “VIEW MY CASELOAD”
☑ All the students that you are working with shall appear.