

# Plan Audit Report

Last Modified on 12/14/2025 8:45 pm CST

[Report Editor](#) | [Generate the Plan Audit Report](#)

Tool Search: Plan Audit Report

The Plan Audit Report reviews basic data entered in special education plans and assesses areas that may have incorrect or missing data for the plan in general and services it describes. Once errors are identified, plans can be updated to reflect correct information.

**Plan Audit Report ☆**

Student Information > Reports > Plan Audit Report

**Plan Audit Report**

Customers run into problems when their end-users have entered data that is invalid in terms of frequency or duration. This report lists services and plans based on the auditing types to help clean up these possible data errors.

Which students would you like to include in the report?

Grade  Ad Hoc Filter

**All Students**

- 09
- 10
- 11
- 12

Enrollment Effective Date 06/11/2024

Which calendar(s) would you like to include in the report?

active year  list by school  list by year

**23-24**

- 23-24 Arthur Elementary
- 23-24 Carter Middle
- 23-24 Cleveland Elementary
- 23-24 Fillmore Middle School
- 23-24 Harrison High**
- 23-24 Lincoln Elementary
- 23-24 Taylor K-8
- 23-24 Van Buren High School
- KG 23-24 Cleveland Elementary

CTRL-click or SHIFT-click to select multiple

**Plan Audit Options**

- Without Start/End Date
- End Date before Start Date
- Plan Overlapping
- Without a Service
- Over a Year

**Service Audit Options**

- Without Start/End Date
- End Date before Start Date
- Service Overlapping
- No Service Minutes
- Service Minutes > Full School Day Minutes

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**Plans**  Active Only

Start Date  To

End Date  To

**Service (Total: 28)**

All service

- Assistive Technology
- Audiology
- Behavioral Therapy
- Classroom Modifications (adaptations)
- Counseling Services
- Developmental Adapted Physical Education
- Gifted and Talented services
- Graphic Organizers
- Individualized Instruction

**Providers (Total: 32)**

All providers

- Abra, Dean
- Administrator, System
- Albinak, Gloria
- Albinak, Gloria
- Basile, Gene
- Bel, Caroline
- Bloom, Charlie
- Cline, Allison
- Coleman, Dave

Print in HTML format

Generate Report

Plan Audit Report Editor

See the [Student Information Reports Tool Rights](#) article for the tool rights needed to generate this report.

# Report Editor

The following table describes the options available for report generation.

Field	Description
<b>Grade</b>	Selecting one or more grade levels limits the report to plans for students enrolled in those grade levels.
<b>Ad Hoc Filter</b>	Selecting an established <a href="#">Ad hoc Filter</a> limits the report to plans for students included in the filter.
<b>Enrollment Effective Date</b>	Defaults to the current date. Limits plan included in the report to those belonging to students whose enrollments are active on the date entered.
<b>Without Start/End Date</b>	Reports plans that do not include a Start Date or an End Date or both.
<b>End Date before Start Date</b>	Reports plans in which the End Date is earlier than the Start Date.
<b>Plan Overlapping</b>	Reports instances where a student has multiple plans active at the same time.
<b>Without Service</b>	Reports plans that do not have services entered.
<b>Over a Year</b>	Reports plans where the Start Date and End Date are more than a year apart.
<b>Without Start/End Date</b>	Reports service records that do not include a Start Date or an End Date or both.
<b>End Date before Start Date</b>	Reports service records in which the End Date is earlier than the Start Date.
<b>Service Overlapping</b>	Reports instances where a student has multiple services active at the same time.
<b>No Service Minutes</b>	Reports service records that do not have an service time recorded.
<b>Service Minutes &gt; Full School Day Minutes</b>	Reports service records where the reported service minutes exceed a full school day.
<b>Active Plans Only</b>	Marking this checkbox causes only Active plans to report.
<b>Start Dates</b>	Entering a date range here limits the plans reported to only those that have a start date within the entered range.
<b>End Dates</b>	Entering a date range here limits the plans reported to only those that have an end date within the entered range.

Field	Description
<b>Services</b>	Select which Services should be audited for the report. <a href="#">Services</a> are established in System Administration and assigned to students using special education <a href="#">plans</a> .
<b>Providers</b>	Select which Service Providers should be audited for the report. <a href="#">Service Providers</a> are established in System Administration and assigned students using special education <a href="#">plans</a> .

## Generate the Plan Audit Report

1. Indicate which students should appear in the report by selecting a **Grade** or **Ad hoc Filter**.
2. Modify the **Enrollment Effective Date** by entering a date in *mmddyyyy* format or by clicking the calendar icon and selecting a date.
3. Mark the **Plan** or **Service Audit Options** that should be assessed in the report. See the table above for a description of these fields.
4. Select the **Calendar(s)** that should be included in the report.
5. Indicate if only **Active** Plans should be included in the report.
6. Enter **Start** and **End Date** ranges to narrow report results.
7. Indicate which **Services** should be included in the report.
8. Indicate which **Providers** should be included in the report.
9. Indicate if the report should **Print in HTML Format**. Otherwise, the report generates in PDF format.
10. Click the **Generate Report** button to view the report in the desired format.

2011-12 Adult Academic Program		Special Ed. Plan & Service Audit Report																					
Generated on 04/04/2012 12:01:43 PM Page 1 of 133		Calendars(39): 2011-12 Adult Academic Program, 2011-12 Creative Play, 2011-12 Early Childhood/Cavana... All Grades Students: 354 Plans: 11 Service: 844																					
Plan Audit for 2011-12 Highview Alternative P Plans: 1 Students: 1																							
<table border="1"> <thead> <tr> <th>Student Name(#)</th> <th>Grade</th> <th>Plan</th> <th>Start/End Date</th> <th>Type</th> <th>Error</th> </tr> </thead> <tbody> <tr> <td>Student, Alice (#123456)</td> <td>12</td> <td>281 IEP (SECONDARY) 281 IEP (SECONDARY)</td> <td>11/11/2010 - 11/10/2011 11/23/2009 - 11/22/2010</td> <td>Annual Annual</td> <td>Overlapping Plans</td> </tr> </tbody> </table>						Student Name(#)	Grade	Plan	Start/End Date	Type	Error	Student, Alice (#123456)	12	281 IEP (SECONDARY) 281 IEP (SECONDARY)	11/11/2010 - 11/10/2011 11/23/2009 - 11/22/2010	Annual Annual	Overlapping Plans						
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Plan Audit PDF Example

The generated report displays student Name, Number and Grade, the name of the Plan in which the error was found, the Start and End Dates of the plan, the Type of plan and the identified Error.