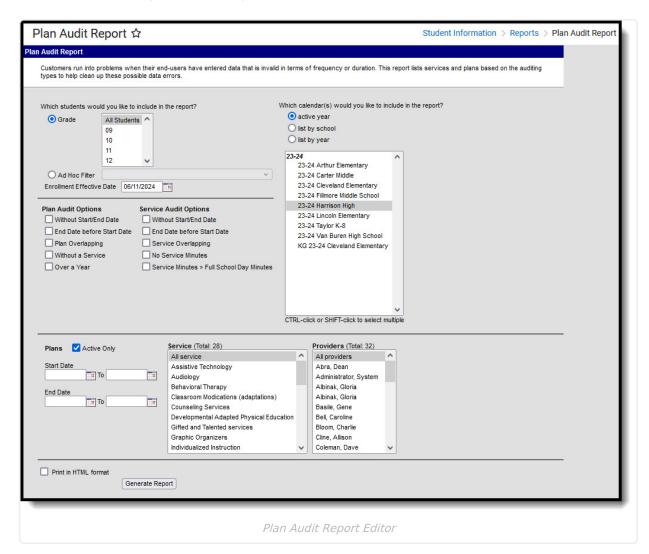# Plan Audit Report

Last Modified on 04/01/2025 1:43 pm CDT

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 Editor

See the Student Information Reports Tool Rights article for the tool rights needed to generate this report.

Report Editor

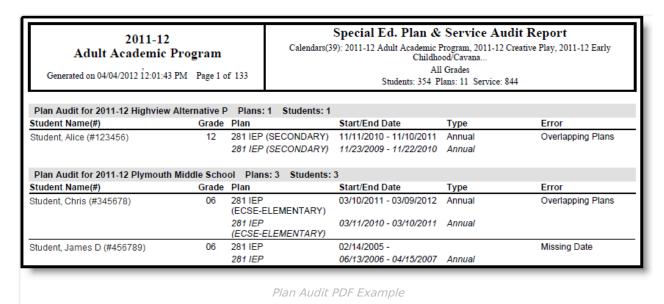The following table describes the options available for report generation.

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

Field	Description
Providers	Select which Service Providers should be audited for the report. Service Providers are established in System Administration and assigned students using special education plans.

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.

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.