


Proposal for Broward County Public Schools

Accelify is pleased to present the following proposal for the licensing of our AcceliPLAN 504 Plan Management system to Broward County Public Schools.

AcceliPLAN 504 Plan Management System

 is a highly configurable workflow based 504 case management system. The system is designed to streamline the entire case management process from referral and intake, assessment, and eligibility determination to service planning, transition and exit. AcceliPLAN includes a custom form builder and event dependency manager, which allows for rapid form development and configurable workflow management to conform to each district's 504 process. In addition, AcceliPLAN includes a proprietary report builder that provides even greater insight into program processes and data.

Designed to work independently or in seamless conjunction with AcceliTRACK, the system maintains IDEA compliance by verifying that all 504 services prescribed in a child's 504 PLAN are delivered. When used with AcceliCLAIM, districts can maximize Medicaid reimbursements with the confidence that they only submit Medicaid claims for services that have been properly authorized in a 504 PLAN.

How AcceliPLAN Works:

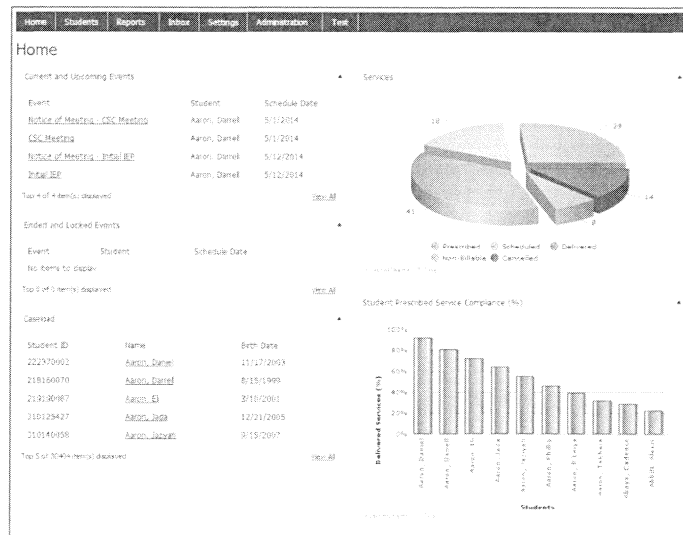
The Homepage

Upon entering the system, users are directed to the Homepage pictured below. The homepage displays Current and Upcoming Events, which lists, in chronological order, events in an *Initial* or *In Progress* status. This provides the user quick access to those events that are most timely. Clicking on an event, opens up the event form(s) for editing. When creating a new event for a student or child, only certain events are accessible depending on where the child is in the EI process.

The Homepage also lists Ended and Locked Events. These are completed events that have been locked and cannot be edited.

The Caseload lists all children assigned to the user. The user can only access events for those children assigned to his/her caseload.

Services displays all services delivered against each child's 504 PLAN and the Prescribed Service Compliance displays a percentage of the total delivered minutes against the total prescribed minutes in the 504 PLAN.



The Summary Page

To access a specific child, the 504 team member selects the child from the Caseload. This will bring up the Summary Page for that child. The Summary Page highlights the child's demographic information, important dates, 504 plan team members, disabilities and goals. The side menu provides access to all forms (including events, services, goals, evaluations and progress reports) and other pertinent information.

Darrell Aaron

Summary

Demographics

Events

Services

Goals

Evaluations

Progress Report

Contact Log/Notes

Accommodations/Assessments

Summary

Student Information

Name: Darrell Aaron

Student ID: 218160070

DOB: 8/15/1999

Gender: Male

Grade: NA

School: Davis Middle School

IEP:

Eligibility:

Events

Services

Goals

Responsible Providers

Name

Type

Keller, Marvin

Physical Therapist

Lazaro, Joseph

Physical Therapist Assistant

Manna, Warren

Licensed Psychologist

Moore, Ruby

Speech-Language Pathologist

Mora, James

Licensed Psychologist

Disabilities

Priority

Disability

No items to display

Custom Fields

Most Recent Eligibility Meeting Date: N/A

Most Recent IEP Consent Date: 05/27/14

Most Recent Addendum Date: N/A

Most Recent FBA Date: N/A

Most Recent SIP Date: N/A

Most Recent Manifestation Date: N/A

Preschool Home Rest of Day:

Preschool Reg Early Childhood:

Special Ed in Reg EC:

Time in Reg EC:

Part C to Part B Indicator:

Part C to Part B Date:

Manifestation Determination Indicator:

Referral Date: 3/5/2014

Consent Initial Evaluation Date: 3/10/2014

Consent for Placement Indicator:

Consent for Placement Date:

Exit Date:

Exit Reason:

Goals

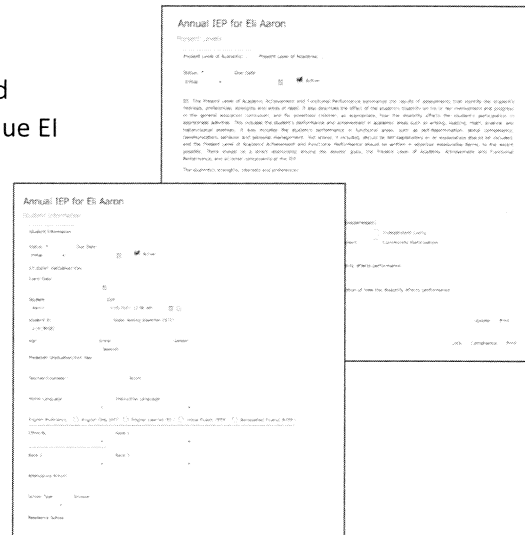
Money, Linear Measurement, Weight/Mass, and Volume

Demonstrate comprehension of information resources to research a topic

Computation and Estimation: Create and solve story and picture problems with one step solutions (addition and subtraction).

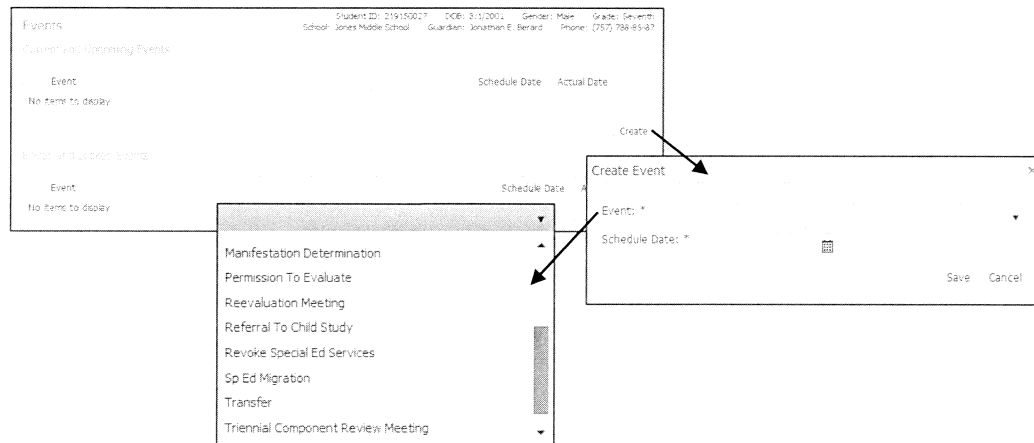
Custom Form Creation

AcceliPLAN includes a Form Manager that provides rapid development of forms to conform to each district's unique EI process. Forms and form fields appear based on configurable event dependency settings defined by the client.



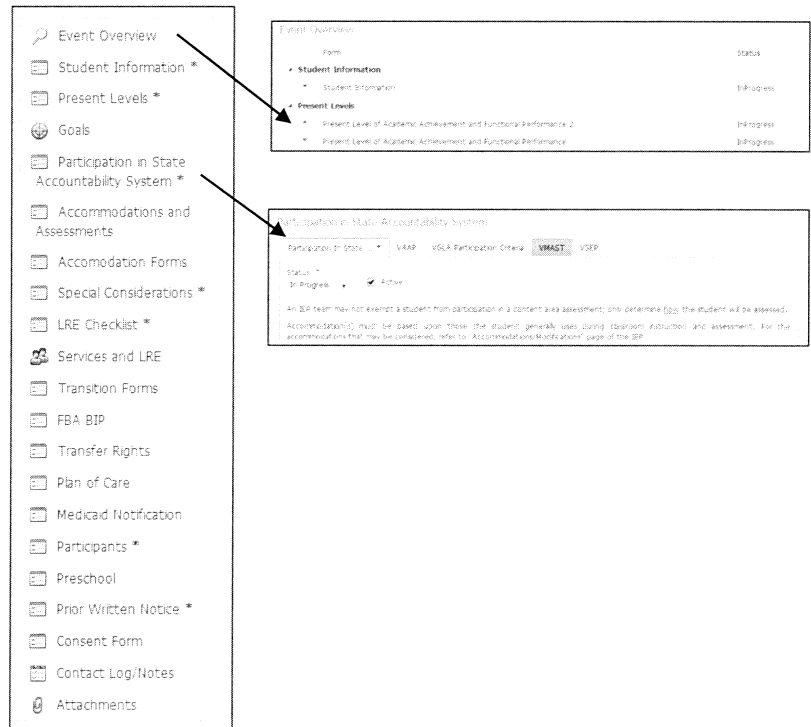
Events and Forms

To initiate an event, the user clicks Events in the side menu. Clicking *Create* will activate the initial event for the child. Once the initial event is created, subsequent events are created as each current event is locked. This ensures 504 team members follow a standard workflow.



Each event includes multiple forms for completion. The side menu provides access to each form that must be completed under the event. Forms can also be grouped under one section in the side menu for easier navigation to forms that are part of a similar process. In the example shown, multiple forms are tabbed under the section for Participation in State Accountability System. Hovering over the Event Overview displays a preview of which forms are included under each section and the status of each form. In addition to custom forms, every event includes a section for:

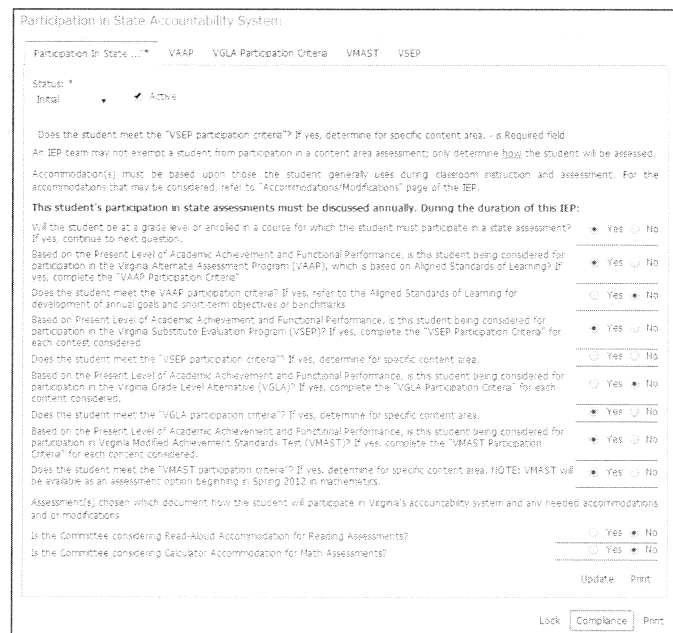
- Student/Child Information
- Contact Log/Notes
- Attachments



The screenshot shows the 'Event Overview' sidebar on the left with sections marked with an asterisk (*). The main content area displays a preview of the 'Participation in State Accountability System' form, which includes tabs for VAAP, VGLA Participation Criteria, VMASST, and VSEP. The status is set to 'Active'.

Sections marked with an * contain one or more required forms.

Once a form is completed the system provides the ability to check for missing required fields using the Compliance button before the form is locked. Missing fields are listed at the top of the form in red.



The screenshot shows the 'Participation in State Accountability System' form. It includes a 'Status' dropdown set to 'Active'. The form contains several questions with radio button options for 'Yes' or 'No'. At the bottom, there are buttons for 'Lock', 'Compliance', and 'Print'.

Clicking the Lock button within any form locks all the forms within the event. This action also automatically creates the next event in the 504 PLAN workflow (i.e. locking “Referral to Child Study” create the new event “CSC Meeting”). If there are errors in the event forms that prevent it from being locked, a popup warning will appear listing the forms that must be completed before the event can be locked.

Summary

Section: Present Levels
Fill in Required fields
Present Level of Academic Achievement and Functional Performance 2
Present Level of Academic Achievement and Functional Performance

Section: Participation in State Accountability System
Fill in Required fields
Participation In State Accountability System

Section: LRE Checklist
Fill in Required fields
Least Restrictive Environment

Section: Special Considerations
Fill in Required fields
Special Considerations

Section: Prior Written Notice
Fill in Required fields
Prior Written Notice Of Intent To Initiate Deny or Change

Section: Student Information
Fill in Required fields
Student Information

The Report Builder

Report Builder

1

Baseline Student Data

Form Definition

3

×

 IepConsentDate

+

 EligibilityMeetingDate

+

 InDistrictStudent

+

 RecentIepMeetingDate

2

Most Recent IEP Meeting Date:

Most Recent IEP Consent Date:

Most Recent Eligibility Meeting Date:

In District Student:

☐ Yes ☐ No

4

Report

Report Name: *

Students with Consent in January 2014

☒ Published

IepConsentDate: *

☒ IepConsentDate

5

Filters: +

From

1/1/2014

And

To

1/31/2014

6

Save

The Report Builder provides the ability to select from any form field to create custom reports with the ability to modify conditions, set filters, and publish and share reports with other users. To create a report, the user completes the following steps:

1. Select the first form from which data will be extracted. This will open the form in the Form Definition box. In the example above, the form *Baseline Student Data* is selected.
2. Use the form to locate the field(s) to add to the report. Click on the field in the form to highlight the field in the left selection menu. Both fields will be highlighted pink.
3. Select the fields from the field list by clicking the plus sign. Once selected, the field will be highlighted green.
4. In the report section, name the report. Selecting *Publish* will add the report to the system-wide report menu so other users can access it.
5. Selected fields can be renamed and filters can be applied to limit the data displayed under each report field. To add a field filter click the plus sign. In the example shown, a report is being built to display all consents signed in January 2014.
6. To add data from another form to the report, select a new form and repeat the steps above. Once complete, press Save. The report will be available in in the Report Manager.

The Report Manager

The Report Manager lists the reports that have been created and shared by system users. Reports can be filtered by name, published, and creation date for quick access. Clicking **View** will display the report below the list of all reports. Clicking the edit icon will open up the report for editing in the Report Builder. Filters can also be applied for the selected report by expanding the **Filter** box above the report displayed. Clicking print will produce an exportable file of the selected report.

Report Manager

Filters

Created Date From:

Report Name:

Created Date To:

☐ Published Only

Filter Reset

Name	Columns Count	Published	Created By	Created Date		
Ethnicity Asian	1	true	SuperLion	3/10/2014	View	
Primary Language	3	true	JohnE	3/17/2014	View	
GuardianAndParentPrimaryLanguage	3	true	JohnE	3/17/2014	View	
Language	3	true	JohnE	3/21/2014	View	
Over due IEPs	1	false	superlion	3/31/2014	View	

1

2

3

5

items per page

1 - 5 of 14 items

Create

Preview of FBA Referral and Tracking

Filters

Form Definition:

Student First Name:

Schedule Date From:

Student Last Name:

Schedule Date To:

Filter Reset

Student Name	Form Name	Schedule Date	Is Eligible For Spec...	Is Complete FBA N...	Has Been Student ...
Aaron, Darrell	FBA Referral and Tracking Form	5/21/2014			
Aaron, Jade	FBA Referral and Tracking Form	5/21/2014			
Aaron, Eli	FBA Referral and Tracking Form	5/21/2014			
Aaron, Phillip	FBA Referral and Tracking Form	5/22/2014			
Aaron, R'Leiya	FBA Referral and Tracking Form	5/22/2014			

1

2

3

4

5

items per page

1 - 5 of 18 items

Print

Role-based Permissions

Custom user-roles and role-based permissions allow the district to control who can create, read, update or modify, delete and lock forms.

Permission Manager

Sped Teacher ▼

Common Permissions ▲

Administration Permissions

- ☐ Can View Cache Manager
- ☐ Can View Permission Manager
- ☐ Can View Form Definition Manager
- ☐ Can View Form Field Definition Manager
- ☐ Can View Lookup Type Manager
- ☐ Can View Lookup Value Manager

Event Permissions ▲

Annual IEP	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Consent IEP	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
CSC Meeting	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Documentation of Attempts	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Eligibility Committee Meeting	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Evaluation Forms	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
External Eligibility	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
External IEP	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
IEP Addendum	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
IEP Addendum - Additional Evaluations	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Initial Eligibility Committee Meeting	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Initial IEP	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Manifestation Determination	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Medicaid Consent	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Notice of Meeting - CSC Meeting	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Notice of Meeting - Eligibility Committee	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Notice of Meeting - IEP Addendum	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock
Notice of Meeting - IEP Annual	<input type="checkbox"/> Create	<input type="checkbox"/> Read	<input type="checkbox"/> Update	<input type="checkbox"/> Delete	<input type="checkbox"/> Lock

AcceliPLAN Feature and Benefits

- Ability to manage all 504 processes from referral and intake, assessment and eligibility determination, to service planning, transition and exit.
- User-friendly form builder for rapid development of referral, assessment, eligibility, 504 PLAN/service plan and transition and exit forms.
- Built-in compliance check on all form fields before forms can be locked.
- Event dependencies ensure users follow a defined workflow for streamlined process management.
- Configurable timelines for all event types and robust reminder system for upcoming Early Intervention events from referral through transition and exit.
- Report builder can generate reports based on any form field with the ability to modify conditions, set filters, and publish and share.
- Unlimited, fully-configurable user roles and role-based permissions.
- Automatically roll over data from one year's 504 plan to the next.
- Ability to archive multiple draft and final 504 plans.
- Ability to store historical data for child searching and program reporting, including closed cases.
- Robust system search capabilities for quick access to child records.
- Built-in contact log, notes and attachments for each event.
- Track all 504 process dates, including the ability to customize the workflow to district specific 504 processes.
- Ability to generate form letters, including eligibility determination letter.

Project Scope of Work:

The pricing proposal contained herein covers the following scope of work. The goal is to launch the system within 90 days of receipt of initial purchase order.

Description	Timing
Review of current 504 program policies and procedures with relevant BCPS staff	Within 2 weeks of PO
Development of a specification document/project plan for Broward County Public Schools 504 Management program	Within 3 weeks of PO
Custom configuration of all relevant 504 Plan Management data capture screens.	Immediately following the development of specifications though system launch
Custom configuration of all relevant 504 Plan Management workflow elements and program requirements.	Immediately following the development of specifications though system launch
Custom configuration of all relevant 504 Plan Management output documentation (i.e. printed forms)	Immediately following the development of specifications though system launch
Custom configuration of all relevant 504 Plan Management reports (outlined during initial scope of work)	Immediately following the development of specifications though system launch
Custom development of system elements as deemed necessary during the development of the specification document. (Any custom development not outlined in the specification may be subject to additional charges.)	Immediately following the development of specifications though system launch
Development of a BCPS specific training manual and online materials for 504 Plan Management system training.	70-80 days post purchase order
Up to 4 user level trainings (1/2 day) or 4 train the trainer training sessions (1/2 day) during initial implementation. Subsequent trainings will be provided electronically through webinars and video training. Additional onsite 1/2 day training sessions can be purchased at a cost of \$800.00 per session.	90 days post purchase order
Post launch user support (provided 9-5 eastern time, Monday through Friday via telephone and via email 24/7 with no less than a next business day response).	Ongoing for term of initial contract and any optional support periods

Pricing proposal:

Product	Description	Regular Pricing	BCPS Pricing
AcceliPLAN 504 Plan Management System Perpetual License	Includes: Perpetual License for use of the complete workflow, forms and reporting management tool for the development and maintenance of 504 Plans at Broward County Public Schools. All implementation and initial training services re are included as listed above. Additionally, this covers related hosting costs for as long as BCPS continues to utilize the system. Also includes telephone support during the initial contract year. Also includes a copy of the relevant source code upon district request.	\$3.00 per IEP student per annum plus 33% implementation fee (\$119,700)	One Time Payment: \$47,500.00

Product	Description	BCPS Pricing
<u>Optional</u> Annual Support Plan PLEASE NOTE: This support plan is NOT necessary to be able to manage this system on an ongoing basis.	Includes: Ongoing telephone and email support, as well as web-based trainings, for each annual option period. In addition, includes version upgrade support for the AcceliPLAN 504 module.	<u>Optional</u> Annual Fee: \$15,000.00