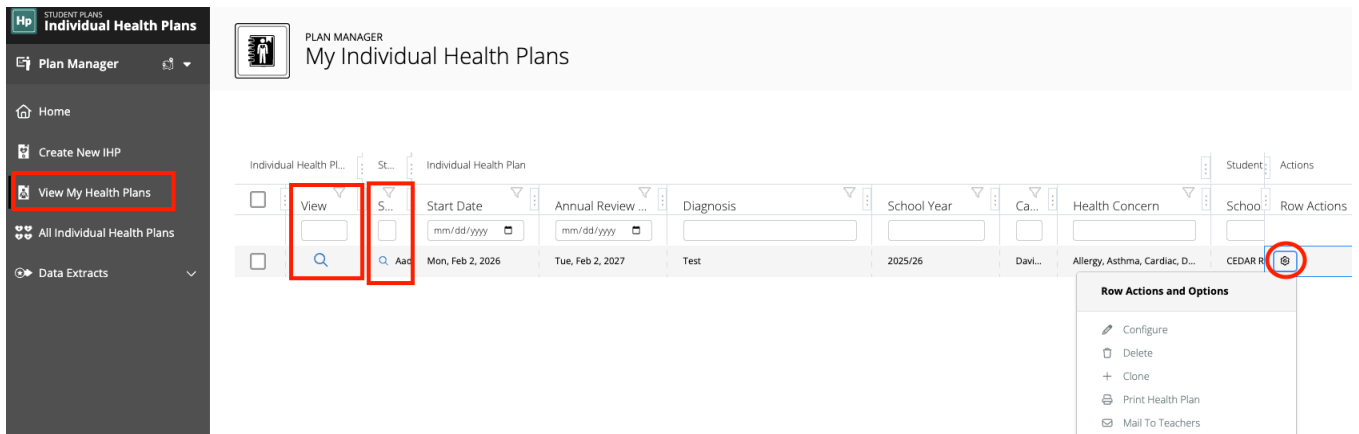


Manage Individual Health Plans (Connect)

Here you will learn to manage Individual Health Plans.

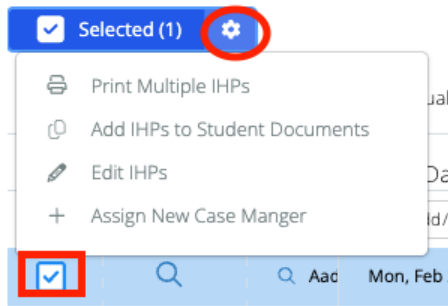
View My Health Plans

1. Start in the left navigation menu and choose **View My Health Plans**.
2. You will see a data table of all the Health Plans you helped create or where you've been named as the case manager.



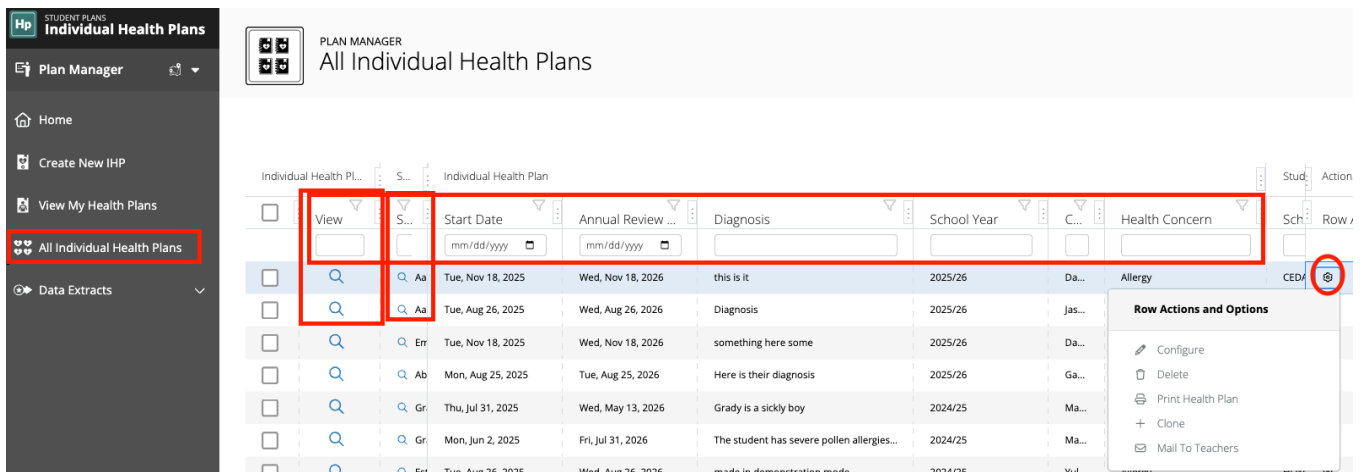
The screenshot shows the 'PLAN MANAGER' interface for 'My Individual Health Plans'. On the left, a navigation menu includes 'View My Health Plans' (highlighted with a red box). The main area displays a table with columns: Individual Health Plan, Student, Individual Health Plan, Start Date, Annual Review, Diagnosis, School Year, Case Manager, Health Concern, School, and Row Actions. The 'View' and 'S...' buttons in the first two columns of the first row are highlighted with red boxes. The 'Row Actions' gear icon in the last column of the first row is also highlighted with a red box. A dropdown menu for 'Row Actions and Options' is open, showing options: Configure, Delete, Clone, Print Health Plan, and Mail To Teachers.

3. Click the magnifying glass in the **View** column to view the **Manage Individual Health Plan** page.
4. Click the magnifying glass in the Student Name column to view the **Student Dashboard** page.
5. Use the **Row Actions** gear to the far right and choose one of the following:
 - a. **Configure**
 - b. **Delete**
 - c. **Clone**
 - d. **Print Health Plans**
 - e. **Mail to Teachers**
6. You can take action on multiple plans at once by selecting one or more **checkboxes** to the far left.
7. Click the **Sected Gear** in the top left and choose one of the following:
 - a. **Print Multiple IHPs**
 - b. **Add IHPs to Student Documents (Student spotlight)**
 - c. **Edit IHPs**
 - d. **Assign New Case Manager: Once selected, it will be reflected in the table immediately.**



All Individual Health Plans

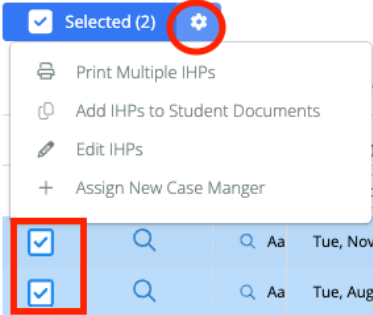
1. Start under **All Individual Health Plans** in the left navigation.
2. You will see a data table for the Individual Health Plan you manage.
3. Use the search fields at the top of each column to **filter** to specific students or health concerns.



Individual Health Plan	Student Name	Start Date	Annual Review	Diagnosis	School Year	Health Concern	Row Actions
	Q Aa	Tue, Nov 18, 2025	Wed, Nov 18, 2026	this is it	2025/26	Allergy	⚙️
	Q Aa	Tue, Aug 26, 2025	Wed, Aug 26, 2026	Diagnosis	2025/26	Jas...	
	Q Err	Tue, Nov 18, 2025	Wed, Nov 18, 2026	something here some	2025/26	Da...	
	Q Ab	Mon, Aug 25, 2025	Tue, Aug 25, 2026	Here is their diagnosis	2025/26	Ga...	
	Q Gr	Thu, Jul 31, 2025	Wed, May 13, 2026	Grady is a sickly boy	2024/25	Ma...	
	Q Gr	Mon, Jun 2, 2025	Fri, Jul 31, 2026	The student has severe pollen allergies...	2024/25	Ma...	
	Q Fei	Tue, Aug 26, 2025	Wed, Aug 26, 2026	made in demonstration mode	2024/25	Vul...	

4. Click the magnifying glass in the **View** column to view the **Manage the Individual Health Plan** page.
5. Click the magnifying glass in the **Student Name** column to view the **Student Dashboard** page.
6. For each plan, use the **Row Actions and Options** gear to the far left and choose one of the following:
 - a. **Configure (edit)**
 - b. **Delete**
 - c. **Print Health Plan**
 - d. **Clone**
 - e. **Mail to Teachers**
7. You can take action on multiple plans at once by selecting one or more **checkboxes** to the left of the data table.
8. Click the **Selected Action** gear and choose one of the following:

- a. Print Multiple IHPs
- b. Add IHPs to the Student Documents (Student Spotlight)
- c. Edit IHP's
- d. Assign New Case Manager



Data Extracts

Helpful Resource: <https://support.schooldata.net/hc/en-us/articles/43815976714003>