

Schoolnet: PD Planner

Schoolnet
Instructional Management Suite



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PD Planner

Use PD Planner to manage and track all aspects of an institution's Professional Development (PD) program and align individual plans with school and district goals. PD Planner contains real-time management tools that help determine whether PD initiatives are building skills and creating lasting change.

Additionally, PD Planner connects to Human Resources (HR) or Enterprise Resource Planning (ERP) information sources to manage various data, such as positions, employment information, and state certifications. PD Planner supports mentoring programs and generates compliance reports related to recertification and educator requirements.

About this Guide

The PD Planner training guide helps educators to:

- Create PD initiatives and activities with eligibility based on prerequisites, certification, subjects taught, and more
- Measure PD effectiveness through ongoing course and instructor evaluations
- Manage, track, and report on mentor relationships and coach interactions
- Save time and reduce paperwork through online course approval, scheduling, registration, attendance, and credit-granting
- Manage PD plan workflow and reporting
- Track attendance, activity completion, certification credits, and activity costs
- Customize individual PD plans aligned to district goals and professional development standards
- Review transcripts at any time and print certificates of completion
- Track teaching certifications and receive certificate expiration email reminders
- Search the activity catalog and register for PD activities online

Because Schoolnet is highly configurable, screenshots in this document may differ from your view, depending on the configuration and the specific roles and operations assigned to you. The data shown here is for demonstration purposes only.

Level of Access

This document includes operations in PD Planner that require the user to have certain levels of access and permissions. Depending on your role, you may be limited to a few of the areas outlined in this document, or you may have access to all areas. Contact your system administrator if you have questions about your access or permissions.

To see what permissions are assigned to you:

1. At the top of the Schoolnet home page, click **My Account**
2. Locate the Other Roles and Operations section
3. Scroll down and view the Educator Development operations for a description of functions that apply to PD Planner

Other Roles and Operations

The following are the Roles and Operations you are assigned to by institution. Only a User Manager can change these settings. Contact your Schoolnet software specialist if you need assistance.

Central City School District

Role	Description
Employee	A person who is employed by the school district.
Guest	A person who is not a member of other user roles (e.g., Parent, Teacher) but who needs ad hoc access to one or more Schoolnet applications.
System Operator	A person responsible for overseeing and administering Schoolnet applications and their users.
Test Item Administrator	A person who has access to test items at an institution

General Operations

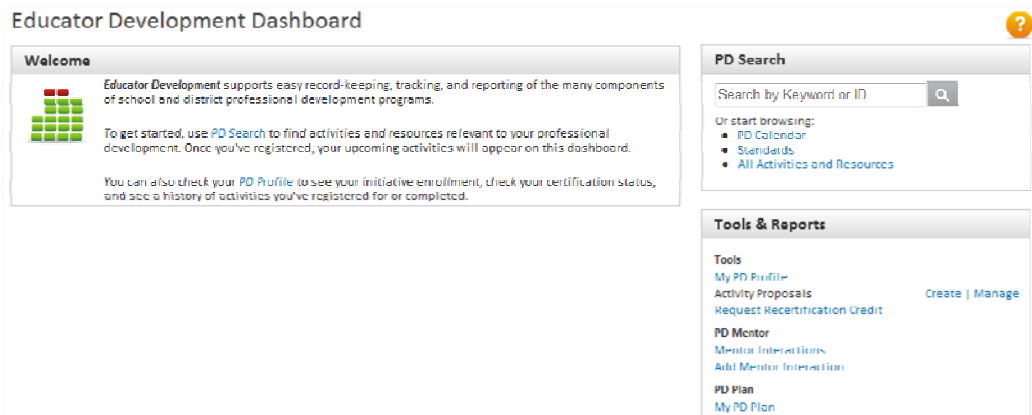
Manage roster verification requests	Allows users to view and manage roster change requests submitted by teachers at a school.
View basic student information	Allows users to view student level information in the institution where the operation is assigned. Teachers do not need this for their students.
View student contact information	Allows users to view student contact information in the institution where the operation is assigned.
View student discipline	Allows users to view student discipline information in the institution where the operation is assigned.

Educator Development Dashboard

The Educator Development Dashboard provides shortcuts to frequently accessed features. It lists upcoming activities you are registered for and may also display activities suggested by a PD administrator, evaluation forms to fill out, and items for approval.

To access your dashboard:

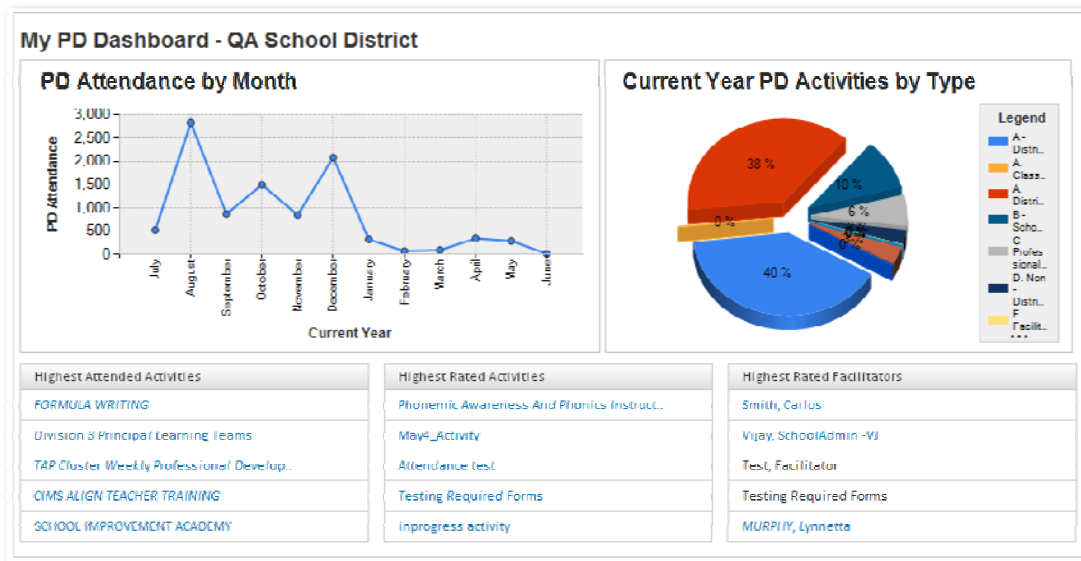
1. Click the Educator Development header on the blue navigation bar



2. Use the Search field or browse to find upcoming staff development activities and resources
3. Click **My PD Profile** under Tools & Reports to access your information

PD Administrator Dashboard

Depending on your site configuration, the administrators have a reporting section not visible to other users.



PD Profile

In the PD Profile, the tabs visible to you will depend on your role and site configurations.

Depending on your settings, you'll create a PD plan in which you set individual goals and view progress toward professional development plans. Mentors can set up PD plans for their mentees if their district is using the mentoring feature.

Access Your PD Profile

Individual users have their own PD Profile that consists of several sections related to goals, plans, and activities.

To access your PD Profile:

1. From the Educator Development menu, select **My PD Profile**
2. Browse through each of the tabs

Some content comes from your district's human resources files or is entered automatically as you register for activities.

My PD Profile: Andrea Greene

PD Overview | PD Goals | PD Plans | Initiatives | **Activities** | Facilitating Activities | Forms | Certificates | About Individual | Reviewer Settings

Your registered activities and recertification credits are listed below. Click [View Recertification Summary](#) below to see your progress (opens in new window).
[Download Complete recertification credit guidelines](#)

View by:

Results 1 - 3 of 3

Activity Name	Activity Type	Credit	Participation	Activity Request	Start/End Dates
Intervention for Struggling Readers: Reading First	B - School-Site Workshop	1.80 CEUs	Registered		9/21/2010 - 5/12/2011
The Psychology of Creativity: The Psychology of Creativity	A - District Workshop	0.00 Semester Hours	Registered		2/1/2011 - 2/8/2011

Set Personal PD Goals

You can use PD Planner to track personal and professional development goals on a standard or content area. Once you set your goals, view and register for available activities related to each goal. As you complete activities, track your progress for each goal. On some sites, the PD Goals tab is disabled.

To set a goal based on standards:

1. Navigate to My PD Profile and click the PD Goals tab
2. In the "Goals Related To Standards" section, click **Set new goal**
3. Choose a standard set
4. Enter a description for your goal
5. Select a standard
6. Click **Set Goal**

To set a goal based on a content area:

1. Navigate to My PD Profile and select the PD Goals tab
2. In the "Goals Related To Content Areas" section, click **Set new goal**
3. Enter a description for your goal
4. Select a content area
5. Click **Set Goal**

Questions for Understanding

- How will you determine your professional development goals?
- What are the two categories of goals?

Practice

- On the PD Goals tab, add a few goals

Edit and Delete Goals

After adding goals, you can edit or delete them.

To edit or delete a goal:

1. To make a change to one of your goals, click the PD Goals tab in My PD Profile
2. From the Select action menu, choose **Edit goal description**
3. Change the description and click **Set Goal**
4. To delete a goal, choose **Delete goal** from the Select action menu
5. Click **OK**

Practice

- Edit one of the goals that you added
- Delete any practice goals that you created

Submit a PD Plan

If you are required to, submit your PD Plan for approval.

To submit your plan:

1. From the Educator Development menu, select **My PD Plan**
 If you haven't created any plans, you will see the Create PD Plan page.
2. For Plan Type, select whether you are a teacher or administrator
3. For Certificates, select a certificate to associate with the PD Plan

Some districts configure a setting that requires you to select a certificate to submit a PD Plan.

4. Check **Goals appear in the Goals summary on your PD Profile**

Once you submit your plan for review, the Goals checkbox disappears. By selecting this option, your goals appear on the PD Planner page.

5. In the Goal Description field, enter your first goal

6. Click **Select Standards**

7. Check the standard(s) that addresses your goal and click **Associate Standards**

8. Click **Add Another Goal** and continue adding goals until you have at least three

9. Click **Save** to save your goals at any time

To edit a plan, return to the PD Plans tab and click the certificate number.

10. When you're finished, click **Submit For Review**

Approve PD Plans

If your institution requires that teachers or other staff submit PD Plans, someone must approve these plans. The number of people required to approve each PD plan varies by site.

To approve PD plans:

1. On the Educator Development Dashboard, under Tools & Reports, click **Review** next to PD Plans

2. Use the Status, Institution, and/or Last Name menus to search for specific plans

If you don't know the school, select the district name to search across users at all schools.

3. Click **Go**

4. Select a submitter's name

The PD Plan Details page appears with details of the type, status, number of reviews required, and any comments and decisions from other reviewers.

5. Click **Show all possible reviewers** to see who else has permission to review this plan

6. Click **Add** to add your comments and decisions

This area is only available to those with Reviewer permissions.

7. Choose your decision and an appropriate comment

8. After making your selections, click **Save**

The submitter views the status of the plan from the PD Profile page.

Archive a PD Plan

As an option, some institutions require teachers to have active PD plans to receive recertification credit for workshops. In this case, archive the active PD plan when a teacher's certificate expires (or for any other reason).

Search for and select a plan as described above, then click **Archive Plan**. If a user submits a new plan, the currently active plan is archived automatically.

PD Activities

A key feature of PD Planner is the catalog of professional development resources. Use the Educator Development Dashboard to browse the available activity options, such as online courses, podcasts, videos, and in-person facilitated learning.

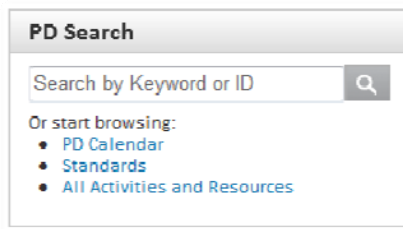
Locate an Activity

The activity catalog contains all upcoming professional development activities in your state and district as well as additional PD resources, such as instructional videos.

For example, to renew your teaching certificate, you need additional professional development hours. So browse the available options and choose a workshop that will best meet your objectives.

To locate an activity:

1. On the Educator Development Dashboard, in the PD Search section, click **All Activities and Resources**



2. Your search results will include statewide activities. Use the filters to the left to reduce the number of results. Use the filters on the left of the PD Search page to narrow the results

- Click the title of an item to access the Details page

Question for Understanding

- What learning opportunities are available to help you meet your professional development goals?

Practice

- Practice searching the activity catalog using the different filters

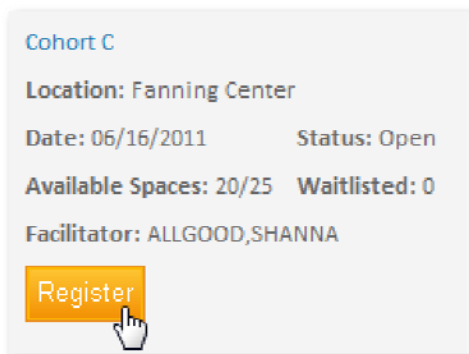
Register for an Activity

Since activities come in several different forms, you won't access all of them the same way. Some activities you'll view online, some require registration, and others you'll download. To see additional details before registering for an activity, select an activity and click one of the section names. The section details contain a link to register.

To register for a facilitated learning activity:

- Click the title of an in-person workshop
- Below the desired open section, click **Register**

Now you're registered. If you have to complete a request to attend the activity, you will be prompted to fill out the request form after you click Register or after you click Request Access for Online Course.



- If there are no open spaces and a waitlist is available, click **Add Me to Waitlist**

You will receive an email confirmation when you are moved off the waitlist.

Questions for Understanding

- How do you view the details of an activity?
- In what instances will you *not* be able to register for an activity immediately?

Practice

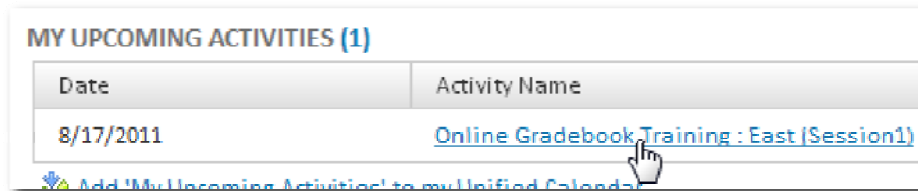
- Register for an activity (you will learn how to cancel the registration later)

Cancel a Registration

If you're unable to attend an activity, cancel the registration so that others may attend.

To cancel a registration:

1. On the Educator Development Dashboard, click the title of the activity



2. Click **Cancel My Registration**
3. Enter the reason for the cancellation and click **Delete**

Practice

- Cancel your registration for the practice activity you just registered to attend

View Progress

Activity progress by goal is the record of activities that you have either registered for, completed, or submitted for approval that relate to any PD goals you have set up. On the Activities tab in the My PD Profile page, view the activity name, activity details, and activity status: registered, in-progress, complete, incomplete, approved (external), or not approved (external).

To view your activities related to a particular initiative, content area, or standard, filter using the View by menu at the top of the page.

To view your progress:

1. In My PD Profile, click the Activities tab
 - By default, you will see all activities that you have registered for.
2. From the View by menu, choose **My Goals**

Practice

- Determine what workshops are offered that will help you achieve your PD goals

Track, Edit, and Delete Activity Requests

Use your PD Profile to check the status of activity requests, edit requests, and delete requests that require pre-approval.

To track the status:

1. Navigate to My PD Profile and click the Activities tab

The Activities tab lists the activities you registered for, including those tagged as pending approval, which means that they have not been reviewed. After activity approval has been submitted, the status will either show Approved or Not Approved in the Request Status column.

2. Click the status of a pending or not approved activity to edit it
3. Click **Edit Request** or **Delete Request**, as needed

Request Recertification Credit

If implemented in your district, use PD Planner to submit a request for recertification credit, to request approval for an external activity, and to track the approval status. Once you complete the activity and reflection form, view the credits in your PD Profile.

The Request Recertification Credit page is divided into the following sections and may include: Basic Information, Activity Details, Location, Certification, Recertification, Supporting Documents, and College. Fields with an asterisk (*) must be filled in.

To request credit:

1. On the Educator Development Dashboard, next to Recertification Credit, click **Request**

Below, you see the **Activity Details** section of the page.

The screenshot shows the 'Activity Details' form with the following fields and options:

- Delivery Method:** Radio buttons for In Person and Online.
- Activity Title*:** A text input field with the placeholder 'Type here to search for an activity'.
- Activity Type*:** A dropdown menu with the option '-- Select one --'.
- Grade Level(s):** Two dropdown menus, both set to 'All Grades', with 'to:' between them.
- Content Area(s):** A text input field containing 'Content Area' and a link 'Add/Edit Content Area' below it.
- Standards Addressed:** A text input field containing 'Standards' and a link 'Add/Edit Standards' below it.
- Description*:** A large text area for entering the activity description.
- Internal Department*:** A dropdown menu with the option '-- Select one --'.
- External Provider:** A dropdown menu with the option '-- Select one --'.
- Date(s) of activity*:** Two text input fields with 'to:' between them.
- Number of Sessions*:** A text input field.

- In the Activity Details section, enter an activity title

As you type activities that are part of your catalog, the page refreshes with field values from which to choose. If the activity is not in the catalog, enter the activity name in the field located below the activity title. Then complete the necessary fields.

- Select the activity type
- Associate standard(s) and content area(s) to the activity, as needed
- Select an internal department or an external provider
- In the "Date(s) of activity" fields, enter the start and end dates
- Enter the number of sessions (typically this is the number of days)
- In the Certification section, complete the Credit, Credit Type, and Recertification category fields

Assign one type of credit per activity.

- In the Recertification section, indicate how many days you will be absent and, if the activity takes place during school, whether or not a substitute is required

Recertification

Total # of days absent: 1

Date(s) absent: 03/16/2011 to: 03/16/2011

Substitute needed?: Yes No

days sub needed: 0

Date(s) of substitute: [] to: []

- Add expenses, if applicable
- Indicate whether or not this activity is tied to an initiative
- Use the "How does this activity" question fields to describe how the activity will meet goals and improve student achievement
- Select the goals addressed by the activity in the "This activity is related" field
- In the Supporting Documents section, upload any necessary documents

Supported document types include .xls, .doc, .txt, and .ppt. Administrators who approve the recertification documents will be able to view the requests.

- Click **Submit for Review**

An activity request confirmation screen appears. The reviewer(s) will receive an email stating that you have submitted a request. Find the activity on the Activities tab of your PD Profile with a status of Pending Approval. If an administrator denies the activity request, you can use the Edit Request feature to resubmit the request.

Questions for Understanding

- At your district, who will be responsible for approving requests?
- Why do you need to submit requests for external activities?

Complete a Reflection for Approved Activities

Activities that require approval, whether internal or external, often require a reflection form to receive credit.

To complete a reflection form:

1. Navigate to your PD Profile and select the Activities tab
2. Click the activity request status for the specific activity
3. Click **Complete Reflection**, fill in your responses, and submit it

The Complete Reflection button appears when an activity's end date is in the past. Once the request status is complete and the participation status is complete, you will receive the activity credits.

Question for Understanding

- Why might the Complete Reflection button be missing?

Print a Certificate of Completion

After attending a facilitated activity, you may need to print a certificate of completion. Use the View Certificate link to print a certificate of completion once you have been granted credit for attending a workshop.

To print a certificate:

1. Navigate to My PD Profile and select the Activities tab
2. Locate the activity and click **View Certificate**

The View Certificate link appears as soon as you are granted final credit and you've completed any required forms or evaluations. If the certificate does not open when you click the link, make sure to turn off your browser's pop-up blocker. Contact the facilitator of the session if there is a significant delay in granting the final credit.

3. On a Mac, the PDF file should open automatically (depending on your browser settings); on a PC, click **Open**
4. Print using the icon provided in the PDF file

Other Print Options

In addition to the certificate of completion, print other items from the Activities tab.

- Above the activity list, click **Download** to view the recertification guidelines
- Below the activity list, select to view or print a recertification summary or transcript

Rate Activities and Resources

When you participate in an activity or use a PD resource, take a moment to rate it. Your ratings are anonymous and will help other users decide which items to pick in the future. Ratings are on a 0-5 scale, with 5 being the highest. Your recent items appear on the dashboard for rating. On some sites, the rating feature is disabled.

RATE RECENT ACTIVITIES

Activity Name	Section Name	Rating
Introduction to Interventions	Cohort C	★★★★☆
Fitness in Elementary PE	Cohort 3	☆☆☆☆☆

Complete an Evaluation or Survey

Some activities are associated with optional or required forms. The bottom of the Educator Development Dashboard displays a list of any forms needing your attention.

FORMS TO BE COMPLETED (4)

Activity Name	Form Name	Required ?
Bringing U.S. History to life-The Art of Simulated Learning : Cohort 3	Activity Evaluation	No
Online Gradebook Training : East	Activity Evaluation	Yes
Creating Custom Reports in Account : Creating Custom Reports in Account	Implementation Survey	No
Data Coach for Principals : Cohort 4	Implementation Survey	No

Activities, Sections, and Sessions

Understanding the differences between activities, sections, and sessions is critical if you will be creating or submitting items for the PD Catalog. Think of an activity as a course; it may be a one-time offering or be available multiple times throughout the year. Sections are the instances of the activity. A different group of people takes each section. To complete the activity, each section must take one or multiple sessions. Think of the sessions as the meeting times for a section of an activity. The same group of people should take all sessions of an activity to receive full credit.

For example, suppose that Introduction to Outreach is the name of an activity. To accommodate many participants, Introduction to Outreach offers several different sections in multiple places simultaneously, and repeated every month. Each person who registers picks a particular section to attend, based on location, date offered, or intended audience.

A workshop that takes one day to complete has one session; however, if it took two days, participants would have to attend both sessions to receive credit, which is granted for the section. Users cannot sign up for another section of the same activity if they have already received credit for it.

Examples

- You want to track attendance for monthly reading groups, but the same people do not always attend

Suggestion: Create one activity with a session for each month. After the last session, grant partial credit based on the number of sessions attended. However, if participants want to receive credits as soon as possible, create a separate activity for each month so that credit can be granted per meeting.

- Ten people need to take Advanced Reporting Options in School & District Data, and it takes two days to cover

Suggestion: Create one activity with one section that has two sessions

- For Bus Driver Safety training, you will offer the same course in three different locations so each driver can choose to attend the closest one

Suggestion: Create three sections of the activity and enter the location as the section name for each

Activity Proposals

Any user can propose an activity to add to the activity catalog. If approved, the submitted activities are published in the activity catalog. Approvers and submitters receive email notifications about the status of proposals.

To submit an activity proposal:

1. From the Educator Development Dashboard, next to Activity Proposals, click **Create**
2. Complete all the required fields as described below (* indicates a required field)

The fields you see and the order in which they appear may vary.

Field	Input Description
Activity Title*	Enter a meaningful title. The title will appear in the activity catalog with the Section Name appended to the Activity Title.
Activity Number*	The system generates a number automatically.
Sessions*	Indicate how many separate meetings (days) are required to complete the activity for one group of people. Create additional sections, not sessions, if you have more than one group of participants. Online activities do not have sessions.
Internal Department*	Select either a sponsoring internal department <i>or</i> an external provider.
External Provider*	
Activity Type*	Select the most appropriate type.
Grade level(s)*	Select a grade level or range.
Description*	Enter a description of the activity (up to 2,000 characters).
Related PD Initiative	Associate the activity with an initiative, if applicable.
Content Area(s)	Click Add/Edit Content Area to select the primary content area or other applicable areas.
Standards Addressed	Click Add/Edit Standards to align the activity with standards.

Field	Input Description
Section Detail	<p>Enter the details for the first proposed section. Click Schedule Section and enter the following:</p> <ul style="list-style-type: none"> • Section Name – Enter a unique name to differentiate multiple offerings of the same course. If it is a one-time offering, enter any name, such as a repeat of the course name. • Location – Search for a location or choose from the list. If the location is not listed, enter it manually in the fields provided. • Location Notes – Enter optional information, such as information about parking. • Location Approved – Select whether or not you have secured the proposed location officially. • Scheduling Details – Enter the date(s), start time, and end time. To enter an alternate location for a session, click Change to overwrite the location for that session only. • Facilitator – Type the last name of the facilitator in the field and select the name from the list that appears. If the name is not available in the list, type the name to indicate the facilitator. If you enter a facilitator manually, he or she will not be able to take attendance. Contact your district Schoolnet coordinator to add this person to the facilitator list. • Notes – Add notes, as needed. • Approved – Select if the facilitator has been approved. • Open Registration on – Enter the day that the section should appear in the catalog and the last date that participants can register. Be sure to give the facilitator enough time to prepare. • Unlimited participants? – Select Yes or No. • Max Attendees – Enter the maximum number of participants who can attend. Users who try to register after the maximum has been reached will be waitlisted (unless this feature is disabled). Consider inflating this number if “no shows” are likely. • Min Attendees – Enter the minimum number of people who will attend (for information purposes only). <p>Then click Save to return to the activity proposal form. If needed, repeat the process to propose additional sections of the same activity.</p>
Contact Information	Enter contact information for the person responsible for the activity.
Delivery Method	Select “In Person” or “Online.”

Field	Input Description
Participant Eligibility	Restrict who can register based on the job of the participant.
Prerequisites	Restrict registration to those people who have credit for another workshop.
Reviewer Content Area*	Select one area to determine who will review this proposal.
How is this activity aligned...?	Describe how this activity will help meet district goals.
Hours	Complete these fields using the on-screen instructions. Your selection of credit fields may vary.
Recertification Points	
Recertification Category	Select a category.
Notes for Activity Catalog	Enter notes that will appear under the credit fields, if desired.
Activity Fee	Enter a fee, if applicable.
Proposal Details	Enter information about the proposal as directed.

3. Click **Submit for Review**

The appropriate reviewers will be notified of the proposal and you will receive email confirmation that it was submitted. The approver has the ability to attach up to five related documents that users can see on the Activity Details page.

If you can't finish a proposal, save it for later. Only the activity title, type, and content areas must be filled in to save the proposal. Scroll to the bottom of the Create Activity Proposal page and click **Save Draft**. To locate the activity later, go to My Activity Proposals.

Questions for Understanding

- How do you know that you submitted your proposal successfully?
- In your district, who will review the proposals?

Practice

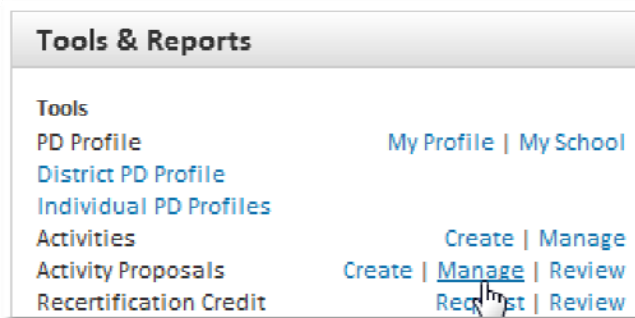
- Create an activity proposal. If the proposal is just for practice, cancel it rather than submitting it.

View Submitted and Draft Proposals

Once you have submitted a proposal, track its status.

To view a proposal:

1. From the Educator Development Dashboard, next to Activity Proposals, click **Manage**



2. Click an activity title to view reviewer comments, edit, or resubmit

Edit and Resubmit Activity Proposals

Only the proposal submitter can edit or resubmit an activity proposal. Once submitted, the edited proposal enters the proposal approval queue and goes through the standard approval process.

To edit a proposal:

1. On the My Activity Proposals page, click the activity title
2. Choose **Edit/Resubmit Proposal**
3. Click **Go**
4. Make the desired changes and resubmit

Request New Sections of Approved Proposals

Any proposal submitter can request offering a new section of an approved activity. The activity information is the same as the approved activity, and the submitter enters the scheduling information for the new section. The new section may follow a different proposal approval process.

To request a new section:

1. On the My Activity Proposals page, click the activity title
2. Choose **Re-Offer Approved Activity** and click **Go**

The re-offer option does not appear until the activity is approved.

3. Enter section details and submit

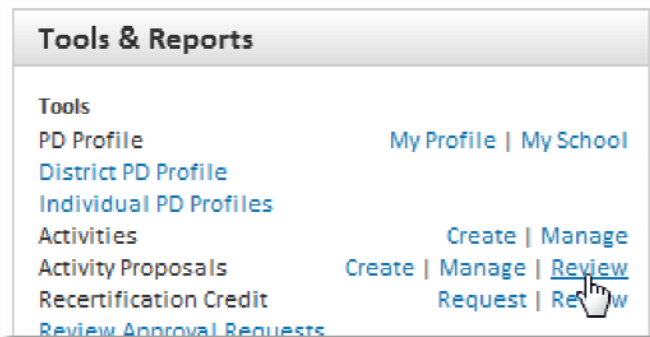
Approve an Activity Proposal

Depending on your district's preferences, activity proposals may require approval by a supervising department (such as the Office of Technology), by content area (such as Math or Reading), departmental district admin(s), or multiple people.

You will only have access to the proposals that you are responsible for approving. System Operators set up users as approvers.

To approve an activity proposal:

1. On the Educator Development Dashboard, next to Activity Proposals, click **Review**



2. Choose search criteria using the menus, then click **Go**

Click **Go** without choosing any criteria to view all proposals available to you.

3. Locate and click the proposal title to view details

Sort the list by clicking a column header.

Title	Activity Number	Section Name	Type	Submitter	Dept
Intro to Assess	4567834365	Assessment Team	New	BOSMA, MARY	Tec

4. Click **Edit** to revise the auto-generated activity number (optional)
5. Click **Edit Proposal** to make changes to the proposal
6. Click **Review Form** to open a checklist that will help you determine whether or not to approve the proposal

The checklist (which varies by site) opens at the bottom of the screen.

Review Checklist

To what extent have you applied what you learned in this activity to student learning?:

Moderately

Is there a description statement?*

Yes No N/A

Does the description specify the content so that participants may identify with their needs?*

N/A Not at all Slightly Moderately Greatly

7. Choose the appropriate decision and add any comments

The decision options are typically Approved, Not Approved, or Revision Requested. You cannot see other comments until you have submitted your decision.

8. Click **Save** and the proposer will receive an email
9. Click **Back to My Activity Proposals** to review additional proposals

View Approver Comments on Proposals

Reviewers can only see their own comments and decisions, not the comments and decisions of other approvers.

To view comments:

1. On the My Activity Proposals page, click the activity title
2. To see the decision and comments, click **View Comments** in the left navigation

Create and Schedule Activities

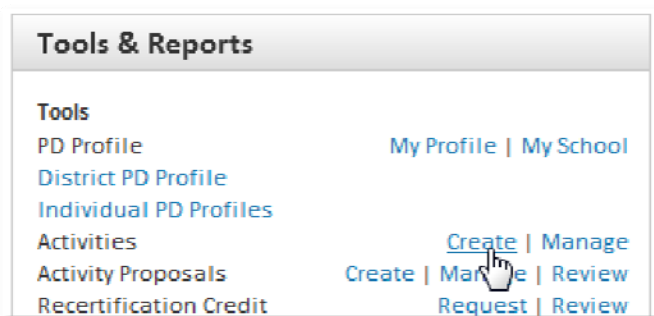
With the appropriate user permissions, you can add activities to the activity catalog without going through the approval process.

Create an Activity

Create activities at the school, district, or state level (if applicable).

To create an activity:

1. From the Educator Development Dashboard, next to Activities, click **Create**



2. Enter the following information (* indicates a required field)

Some fields may vary or be hidden if they are not applicable in your district.

Field	Input Description
School-based Activity*	Select Yes if this is a district-wide PD activity that is being offered in all schools simultaneously, such as on a staff development day. Only sections with one session are supported. Select No if the activity is to be offered in one location. (Only some users will see this option.) <i>See: Alerts for School-based Activities below</i>
Activity Title*	Enter a meaningful title that will appear in the activity catalog with the section name appended to the activity title.
Activity Number*	Enter a unique activity number using your district's numbering scheme.
Number of Sessions*	Enter how many meetings (days) are required to complete the activity for one group of people. Create additional sections (not sessions) if you have more than one group of participants. This field is hidden if School-based Activity is selected, or if the delivery method is online.
Internal Department*	Select either a sponsoring internal department or an external provider.

Field	Input Description
External Provider*	
Activity Type*	Select the most appropriate activity type.
Grade Level(s)*	Select a grade level or range.
Description*	Enter a description of the activity (up to 2,000 characters).
Related Documents	Attach up to five items in standard file formats (videos not included). Users see the documents on the Activity Details page in the Related Documents area.
Related PD Initiative	Add initiatives, if applicable.
Content Area(s)	Add content area(s), if applicable.
Standards Addressed	Add standards to be covered in this activity. Then, using those standards, employees can search for activities that will help them achieve their PD goals.
Contact Information	Enter contact information for the person responsible for the activity.
Delivery Method	Select whether the activity is delivered in person or online.
Related URL	Enter the full URL of additional online information for this activity.
Preregistration Approval Required	Select Yes or No.
Participant Eligibility	Restrict who may register for the activity.
Prerequisites	Add workshop(s) that users must complete before registering for this activity.
Allow Waitlist	Select Yes to enable users to add themselves to a waitlist once the activity reaches the maximum number of participants.
Credit Type(s)	Follow the on-screen instructions to complete these fields.
Hours	
Recertification Category	Choose a category.
Notes for Activity Catalog	Enter optional notes to appear on the Activity Detail page.
Activity Fee	Enter the fee, if applicable.

3. Click **Save**

The Confirmation page appears with a "Go to Activity Details" button. The Activity Details page is the starting point for activity-related tasks such as associating standards, scheduling sections, editing the activity, and managing forms.

Questions for Understanding

- Are there any school- or district-specific procedures you should be mindful of, such as naming conventions or activity numbering?
- Who (or what departments) will be responsible for adding activities to the catalog?

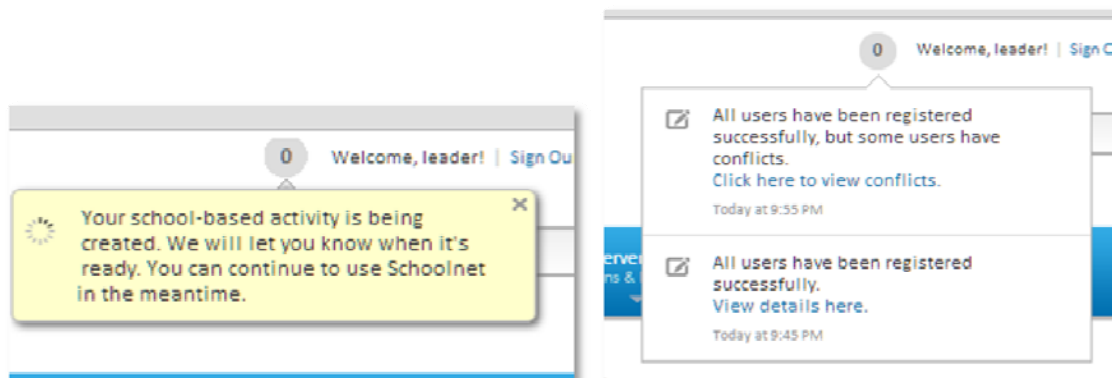
Practice

- Create a few practice activities and be sure to enter a title of **practice for deletion**

Alerts for School-based Activities

When you create an activity that uses the option to enroll all eligible users in a district in the sections for a school-based activity, it takes some time for all users to be registered. You can continue to work. When you save the activity, you will:

- See a start notification in the header
- See an alert when all users have been registered. It will also let you know if any scheduling conflicts were discovered during auto-registration and provide a link to view those conflicts



State Implementations

If the function is enabled, state-level users with the proper permissions can:

- Choose whether an activity they create is available only to other users at the state level or is available to users in every district
- Manage registration, attendance, and credit for all participants

District-level users on statewide sites can also reserve an activity for their own users only or open it up to participation from other districts.

Only users with the right permissions in the host district can view section details to approve registration requests, view the waitlist and add users from the waitlist, remove participants from a section, enter attendance, or award final credit.

Schedule an Activity

After you create the activity, schedule a section of the activity so that it appears in the activity catalog. Scheduling and registration occurs at the section level of an activity.

To schedule a section:

1. On the Educator Development Dashboard, next to Activities, click **Manage**
2. Use the fields to narrow the search results, and click **Go**
3. From the Action menu for a specific activity, choose **Schedule Section**
4. Enter the section information as described in the following table (* indicates a required field)

Field	Input Description
Section Name*	Enter a unique name to differentiate among multiple offerings of the same course.
Location	Search for a location or choose from the menu. If the location is not listed, enter it manually.
Location Website	Enter a URL, if applicable.
Location Notes	Enter a room number, for example.
Scheduling Details*	Displays the number of sessions based on the sessions entered when you created the activity. Enter the date(s), start time, and end time. To enter an alternate location for a session, click Change to overwrite the location for that session only.
Facilitator	Enter the last name of the facilitator and select the name from the list that appears. If a name is not on the list, enter it in the Name field manually. Anyone who is added this way will not be able to take attendance. As a best practice, make sure this person is added to the list of PD Planner facilitators so you can edit the section and select the name.
Facilitator Notes	Add notes, as needed.
Open Registration*	Select the date users can begin to register for the activity. In the Through field, select the last date participants can register. Be sure to give the facilitator enough time to prepare materials. If you expect walk-ins, close registration after the start date so people can register themselves.
Unlimited Participants	Select Yes or No.
Max # of Attendees	If you select No for Unlimited Participants, enter the maximum number of participants who can attend. Users who try to register above this number will be waitlisted unless this feature is disabled. Inflate this number if "no-shows" are likely.

Field	Input Description
Min # of Attendees	Enter a number. This field is for information purposes only.

5. Click **Save and Go to PD Search**, or click **Save and Schedule Another Section**

If you try to schedule an activity session at a location that already has an activity scheduled at that time, an error message may appear (use a configuration option to turn this off).

If you receive the error message, remove the location and select another, or change the date and time of the session. A system administrator can add additional locations.

Question for Understanding

- What is the difference between an activity, a section, and a session?

Practice

- Schedule an activity

Edit an Activity

You can edit information about an activity or a section of an activity if you need to change the information that you entered initially, such as related initiatives or credits offered. Changes apply to all existing sections. Navigate to the Manage Activities page, then search for and select an activity to make any changes.

Edit the section if you need to change scheduling information such as location, date, time, or facilitator. Use the activity catalog to find the section.

To edit an activity (including all the sections):

1. Navigate to Manage Activities
2. Search for and click the activity title
3. Click **Edit Activity**
4. Make any changes and click **Save**

To edit a section of an activity:

1. Navigate to Manage Activities
2. Search for and click the activity title
3. In the Scheduling Sections area, click the section name
4. Click **Edit Section**
5. Make any changes and click one of the "save" options

Questions for Understanding

- How do you delete an activity and all of its sections?
- What do you edit to change a location?

Practice

- Change the start time of a scheduled activity

Add a Prerequisite to an Activity

When you create or propose an activity that builds on a prior activity in PD Planner, you have the option to add it as a prerequisite. If users do not have credit for the prerequisite activity, they will not be able to register for the activity. PD administrators can override this requirement by registering a user themselves, regardless of whether the prerequisites are completed.

To add prerequisites to an activity:

1. Create or propose a new activity
2. Complete the required fields
3. Click **Add/Edit Prerequisite**

Keyword:

Enter full or partial name of the activity or activity number or activity description.

Activity Type:

Grade(s): to Include All Grades

Credit Units:

Content Area:

PD Standard:

Initiatives:

4. Use the fields to narrow the search results, and click **Go**
5. Check the activity name(s) to add as a prerequisite, and click **Add prerequisites**

To remove a prerequisite, locate the Prerequisites field again and click **Remove** next to the activity name.

6. Click **Save**

Questions for Understanding

- Can users register for an activity without completing a required prerequisite?
- What is another way of making sure participants are qualified to take a workshop without using the prerequisite feature?

Include Activity Eligibility Restrictions

Set eligibility criteria that users must meet to register for an activity. To be eligible for an activity, users must meet one of the options selected in each category. PD administrators can override eligibility requirements by registering a user themselves, regardless of whether or not the user meets the criteria.

To add eligibility criteria for an activity:

1. Create or propose a new activity
2. Complete the required fields
3. Click **Add/Edit participant eligibility criteria**

Select eligibility criteria for this Activity below:

[Region Selection](#)

[School Selection](#)

[Job Category Selection](#)

Job Category: Select All Job Categories Teacher Not Applicable Administrator Educator
 Classified

[Job Title Selection](#)

[Certificate Type Selection](#)

[Area Of Certification Selection](#)

[Subject Selection](#)

[Grade Selection](#)

Grade: Select All Grades

Infant/toddler (0-2) Kindergarten Gr 1 Gr 2 Gr 3 Gr 4 Gr 5
 Gr 6 Gr 7 Gr 8 Gr 9 Gr 10 Gr 11 Gr 12

[Enroll Selection](#)

4. Click the + sign to add eligibility restrictions as needed for each selection or category

Users must match in every selected category. Use caution when you add eligibility requirements, especially if you are not familiar with how employees are tagged with titles, categories, and subjects. You might accidentally exclude people you did not intend to exclude.

5. Click **Save > Save**

Question for Understanding

- What are some situations in which you might use the eligibility restrictions feature?

Associate Forms with Activities

Associate forms with activities, such as pre-activity surveys, workshop evaluations, or follow-up evaluations. Make completion of a form required in order for the participant to receive credit. In some districts, a form is attached automatically to each activity, so this step is not necessary.

To associate a form:

1. On the Manage Activities page, search for an activity
2. From the Action menu for an activity, select **Manage Forms**
3. Click **Associate New Form**
4. Select the form and click **Continue**
5. From the "Required for credit" option, select if participants must complete the form in order to receive credit for the activity
6. Choose the default activation date for all sections
7. Click **Save**

To change the default activation date for a specific section:

1. On the Manage Activities page, search for and select an activity title
2. Click the section name
3. From the Select Action menu, choose **Manage Forms** and click **Go**
4. Change the date and time as needed
5. Click **Save**

Questions for Understanding

- What forms are available for you to associate to activities?
- Should it be a best practice to require form completion for credit?
- Which default activation options make the most sense to you?

Practice

- Add a form to an activity
- Change the activation date for a section

Create a Resource

In addition to facilitated and self-directed activities, PD administrators can make resources available to educators. These resources include videos that show exemplary teaching practices, or other videos that don't fit into the "practice" category.

They also can include planning tools and tips, such as documents and web resources to help notify educators of planning and teaching practices. Even learning networks or links to web-based communities can be added as resources.

To create a resource:

1. From the Educator Development menu, click **Create Resource**
2. Select a category

The fields will vary based on what category you choose.

3. Complete the required fields
4. Use the embed code so users can play media without leaving Schoolnet

Navigate to Google or Wiki to learn more about embed code.

5. Align resources to standards and content areas to increase the ability to search for resources
6. Click **Save**

Questions for Understanding

- Name one resource for each category that would benefit educators in your district
- What resources don't fit clearly into just one category? How will you decide which one to use?

Approve Approval Requests

Approve many requests at once or approve them one by one.

To approve requests:

1. On the Educator Development Dashboard, click **Review Approval Requests**

You will see this link only if your district requires you to review approval requests.

The screenshot shows a filter form with the following fields:

- Submitter:** -- Select one --
- Activity:** -- Select one --
- Category:** -- Select one --
- Delivery Method:** -- Select one --
- Type:** -- Select one --
- Approval status:** -- Select one --
- Verification status:** -- Select one --

Below the dropdowns is an orange **Go** button.

2. Use any of the fields to filter the results and click **Go**

If your district has multiple approvers, use filters to find the activities you are responsible for reviewing only.

3. Click the activity name to view comments from the requester
4. Once you have reviewed the comments, click **Back to Review Approval Requests** at the top right corner of the page
5. In the Approved column, choose **Yes** for each request you approve, and click **No** for those you do not approve

You can leave requests pending if needed.

6. In the Reviewer Comments column, enter any comments
7. When you finish, click **Submit Requests Approval** at the bottom of the page

Discussion

- Discuss the criteria your district uses to approve external activities, if applicable
- Discuss how you and your colleagues will divide up requests

Facilitator Tasks

Being a facilitator means that you are acting as the point person for a professional development activity, but not necessarily leading it. In some cases, a school or district PD administrator may handle these tasks, instead of a facilitator. Tasks may include:

- Viewing who will be attending the activity
- Registering attendees
- Managing the waitlist
- Printing sign-in sheets
- Emailing participants
- Adding walk-ins
- Recording attendance (may not be available for all facilitators)
- Granting final credit (may not be available for all facilitators)

Locate Facilitator Activities

As the first step in performing any facilitator task, find the activities assigned to you.

To view assignments:

1. From the Educator Development menu, select **My PD Profile**
2. Select the Facilitating Activities tab and click the title of a section
3. Click **Track session attendance** to see who is registered so far

If there are multiple sessions, click the first link.

Register Attendees

PD administrators and facilitators have the option to register attendees. For example, you can register all staff in your school for a required orientation session. However, individuals can register themselves for activities using the activity catalog.

To register participants for an activity:

1. Navigate to the Attendees page of a session you're facilitating
2. Above the list of names, click **Register Attendees**

If the section has multiple sessions, the user will be registered for all days automatically.

3. Use the menus to locate individuals you want to register and click **Go**

A list of individuals appears. The list may include individuals who do not meet prerequisite and eligibility requirements. PD administrators can override registration

restrictions and select any user. Users who have credit already for this activity or have an activity in this time slot will not appear in the search results.

The screenshot shows a search form with the following fields and options:

- Attendee Name or ID:** Text input field with a placeholder "Enter full or partial name or ID of the employee".
- Institution:** Two dropdown menus. The first is set to "West Region" and the second to "Bumet".
- Job Category:** Dropdown menu set to "-- Select One --".
- Job Title:** Text input field with a placeholder "Enter full or partial job title".
- Area of Certification:** Dropdown menu set to "-- Select One --".
- Subject:** Dropdown menu set to "-- Select One --".
- Grade:** Dropdown menu set to "-- All Grades --".
- Enrolled in Initiative:** Dropdown menu set to "-- Select One --".

At the bottom left, there are two buttons: "Go" (highlighted with a mouse cursor) and "Cancel".

- To the left of the names, select the checkboxes of individuals you want to register for this activity
- Click **Register Selected Attendees**

A confirmation page appears with options to register others for this activity or go to the activity catalog.

Question for Understanding

- What are two ways someone can be registered for an activity?

Manage the Waitlist

A waitlist is generated automatically for any "full" activities unless the feature is disabled. Individuals wanting to register for an activity that is full can be added to a waitlist. If a registered individual cancels a registration, the next individual on the waitlist is registered automatically.

PD administrators can add individuals to the waitlist or register individuals from the waitlist for activities for which they have access. If an activity requires pre-approval, approval must be granted first.

To add registrants from the waitlist:

- Select the name of an activity that you are facilitating
- Choose **View Waitlist** and click **Go**
- Select an individual
- Use the Select Action menu to override the attendance maximum and add the user, or delete the user from the waitlist

Print Sign-in Sheets

Before an activity occurs, print a sign-in sheet that lists all the registered attendees and has space for unregistered participants (walk-in attendees).

To print a sign-in sheet:

1. Select the name of an activity that you are facilitating
2. Click **Track session attendance**
3. Click **Print Sign-in Sheet**
4. Choose to open or save the Word file

Email Participants

Although users receive an email when they register for a class, you may wish to send them special instructions or a reminder closer to the activity date.

To email participants:

1. Select the name of an activity that you are facilitating
2. Click **Track session attendance**
3. Click **Email Attendees in List**
4. Add or delete email recipients, as needed
5. Enter a subject and text for your message
6. Click **Send**

Questions for Understanding

- What are some situations in which you would need to send participants an email?
- Can you include a user who does not have an email listed?

Add Walk-ins

Track the attendance of any unregistered walk-ins. Add any walk-in attendees before changing the session status for registered attendees; otherwise, you will have to re-enter their statuses. Walk-in attendees will then be added to this list (and to any subsequent sessions of the activity listings, as well as to the final credit page) as Registered.

If the activity is full, walk-ins will be added to the list as Waitlisted and a PD administrator will have to register individuals from the waitlist. For multi-day activities, a walk-in added to one session of an activity will be added automatically to all subsequent sessions of the activity.

To add walk-ins:

1. Select the name of an activity that you are facilitating
2. Click **Track session attendance**
3. Click **Email Attendees in List**
4. Click **Add Walk-Ins**
5. Use the menus to limit the results and click **Go**

Users who have credit already for this activity or have an activity in this time slot will not appear in the search results.

6. Check the appropriate name(s) and click **Add Selected Attendees as Walk-Ins**

These users are now added to the attendee list of all sessions of the activity.

Questions for Understanding

- When do you use the walk-in feature?
- What happens if the activity has multiple sessions?

Record Attendance

Record the attendance after an activity. Be sure you've added the walk-ins first.

To record attendance:

1. Select the name of an activity that you are facilitating
2. Click **Track session attendance**

Use the sign-in sheet to determine which registered attendees attended and which did not.

3. Select the status of each attendee accordingly: Attended or Did not attend

You do not need to select the checkboxes when taking attendance. If you haven't submitted attendance for certain users, they appear in yellow.

Name	School	Participation Status	Session Status	Duration (hh:mm)
ALICA, DENILDA	WISE MIDDLE SCHOOL	Registered	Walk-in Attended	2:0
ALLEGOOD, SHANNA	WISE MIDDLE SCHOOL	Registered	Attended	2:0

4. In the Duration field, edit the amount of time that each participant attended the session, if needed
5. Click **Save** to save the attendance or you will have to re-enter it

If you will be granting final credit, refer to the next section for details.

Questions for Understanding

- Can you record partial attendance?
- What should you do before you record attendance?

Grant Final Credit

Attendees do not receive final credit for an activity automatically. Until final credit is submitted, the activity status in their plan is Registered, and the individual's credits are not counted.

To assign final credit:

1. After taking attendance using the sign-in sheet, scroll to the bottom and click **Save and Review Final Credit**
2. For each attendee, verify that the completion status and number of credits are correct

The lower portion of the page may display names of participants who are either waitlisted for the activity or whose activity requests have not been approved. An administrator must either register the participant from the waitlist or approve the individual's request before you can submit credit for the individual.

3. Click **Submit Final Credit**

Questions for Understanding

- What has to happen before you submit final credit?
- Can you grant partial credit?

Keep Track of Form Completion

Associate forms with activities, such as pre-activity surveys, workshop evaluations, or follow-up evaluations. Some activities require form completion in order for the participant to receive credit. Keep track of form completion using several methods, but only facilitators who have permission to grant final credit will have access to track forms.

The first method is to check your activity list. Navigate to My PD Profile, and select the Facilitating Activities tab. For each activity, the Req'd forms column lists the number of forms completed compared with the number of participants. Click the numbers to access a list of participants with the completion status for each.

Activity	Section	Grade level (s)	Start/End date(s)	Credit units	Status	Avail. spaces	Req'd. forms
Outreach Training for School Administrators ☆☆☆☆☆	March '08 Outreach Training for School Admin	PK-12	03/28/2008	3.00 Hours	Closed	10/15	0/5

The second method is to run the Form Completion Report. To access the report, navigate to the Facilitating Activities tab and select the title of an activity. From the Select Action menu, choose **Run Form Completion Report**.

The third method is to check the Activity Section Details page. Navigate to the Facilitating Activities tab and select the title of an activity. The Registration and Scheduling section indicates the number of forms submitted.

Remind Participants to Complete Forms

Although participants receive an email automatically when the form is activated, you may need to remind them to complete forms. Attached forms may be required or optional.

During the scheduled activity, show participants the section on the home page that will indicate what forms need to be completed. This is very helpful to users who are new to PD Planner.

FORMS TO BE COMPLETED (3)		
Activity Name	Form Name	Required ?
Bringing U.S. History to Life-The Art of Simulated Learning : Cohort 3	Activity Evaluation	No
Online Gradebook Training : East	Activity Evaluation	Yes
Creating Custom Reports in Account : Creating Custom Reports in Account	Implementation Survey	No

Also, send a reminder email after the participants complete the activity. Navigate to the Facilitating Activities tab and click the activity name. The steps to complete the reminder email differ depending on whether the form is required or optional.

For required forms, click the numbers in the Req'd forms column and filter for users who have forms outstanding. Select all users, and click **Send Required Form Submission Reminder Email**.

For optional forms, click **N/A** in the Req'd forms column. Check the names of people who should receive a reminder and click **Send NON Required Form Submission Reminder Email**.

View Form Results

Once participants have completed their forms, facilitators view results by navigating to My PD Profile. Select the Facilitating Activities tab and click **View Forms** for an activity. Next to the form, click **View Form Results**.

Below is a list of the forms associated with this activity.

Name	
Activity Evaluation	View Form Results

Enter Course Notes

To foster collaboration and sharing of best practices, facilitators enter notes about an activity to share with other facilitators.

To enter a comment:

1. From the Educator Development menu, select **PD Search**
2. Search for an activity and click the activity title in the results
3. Next to Facilitator Notes, click **Add a Note**
4. Enter your notes and click **Save**
5. Use the Edit or Remove links to make any changes

It was really helpful to email participants 3 days ahead to ask them to bring content to add to their teacher page.
Facilitator, Fran, 6/28/2011 5:08:54 PM [Edit] [Remove]

Question for Understanding

- What are some examples of notes that would be useful to share with other facilitators of the same activity?

Manage Mentor Assignments

Use PD Planner to track mentor and mentee interactions. Mentors record information about the interactions, such as the duration, the interaction type, and the standards addressed.

Assigning Mentors

If your district has a mentoring program in place, manage who is assigned to whom and follow their interactions. One mentor can have multiple mentees.

School administrators assign mentors to individuals in their school. Each teacher can have one mentor, and a mentor can be assigned to an unlimited number of mentees. To create a mentor or mentee assignment, follow these steps.

1. Click the Educator Development header
2. In Tools & Report under PD Mentor, click **Manage Mentor Assignments**
3. Click **Create New Assignment**
4. Type in the full or partial name of the desired mentor in the Select a Mentor box
5. As you type, a list will appear displaying the institution, first and last name, user ID, and role of users who match your search criteria

This list will change as you continue typing.

6. Select the desired mentor

Note that all users will appear as a search result option. However, only users who have been selected as mentors will have mentoring capabilities.
7. If you want to select a mentor using criteria other than first and last name, use the Advanced User Search option
 - Click **Advanced User Search** and the Advanced User Search page appears
 - Select at least one criterion and click **Go**
 - Click the radio button to the left of the individual's name and click **Select User**

You'll find yourself on the Create Assignment page with the selected mentor's information appearing in the Select a Mentor box.

8. Repeat steps 4 through 6 in the Select a Mentee box
9. To remove a selected mentor or mentee, click **Remove** under the mentor or mentee's name
10. When you have made both your mentor and mentee selections, click **Submit** to complete the process

Viewing Mentee Assignments

Track your mentor interactions to better understand the course of your professional development. You can also view assignments and edit or delete interactions as needed.

Both mentors and their mentees will see their assignments on the Overview page of My PD Profile. Mentors access the PD profile of their mentees by following these steps.

1. Roll your cursor over the Educator Development header and click **My PD Profile**
2. From the summary page, you will see a link with your mentee's name
3. Click this link to go to the mentee's profile page

Updating and Deleting Assignments

Administrators can create, view, edit, archive, and delete mentor assignments through the Manage Mentor Assignments and Assignment Details pages.

1. Click the Educator Development header
2. Click **Manage Mentor Assignments** under Tools & Reports
3. Locate the assignment in the list and click **View Assignment** next to the pairing that needs changing
4. On the Assignment Details page, select the appropriate option
 - Edit - change the mentor or the assigned mentee
 - Archive - the assignment is no longer active, but data remains for reporting purposes
 - Delete - the assignment and all associated data (logs) are deleted from the system

Note: The Edit button appears only for district-level assignments created from the Manage Assignments page.

Adding Mentor Interactions

You must be assigned to at least one mentee to input, or log, an interaction. Log mentor interactions to record the time spent with mentees, as well as the issues discussed, meeting outcomes, next steps, and reflections.

Only you and the mentee can view the information in the "Confidential" section. Other fields are available to users who can run reports.

Keep in mind that mentees cannot log mentor interactions; only the mentor can. To add a mentor interaction:

1. Click the Educator Development header

2. Click **Add Mentor Interaction** under Tools & Reports

If you are not assigned any mentees, you will not see this link.

3. Select an individual from the menu and enter the interaction information

Required fields are indicated by an asterisk.

4. Click **Submit**

View your submission by using one of the export options, or click the date the log was submitted.

Searching for Mentor/Mentee Interactions

Administrators can view the mentor interaction logs for their schools.

View all the interactions occurring at your school, or select a mentor/teacher pair by following these steps.

1. Click the Educator Development header
2. Under Tools & Reports, click **Mentor Interactions**
3. Filter your results (mentor, mentee, and date range are required) and click **Go**
4. From the mentor interaction log, click the name of either the mentor or the mentee to access the user's PD Profile About Individual summary

Viewing Interactions

View the interaction logs and create a report for any date range. To view interactions, follow these steps.

1. Click the Educator Development header
2. Under Tools & Reports, click **Mentor Interactions**
3. From the Individual menu, choose either one person or all individuals

Use the fields to narrow the results further. Depending on your level of access, the fields you see may vary.

The screenshot shows a search form for mentor interactions. At the top, there are two radio buttons: 'Only Current Assignments' (unselected) and 'All Assignments (Current and Archived)' (selected). Below this, the 'Institution:' field contains two dropdown menus: 'South Region' and 'Harry S Truman High'. The 'Mentor:*' field has a dropdown menu set to 'All Mentors'. The 'Individual:*' field has a dropdown menu set to 'All Individuals'. The 'From:*' field is set to '07/01/2010' and the 'To:*' field is set to '06/27/2011'. A yellow 'Go' button with a hand cursor is located at the bottom left of the form.

4. Click **Go**
5. Click the date of the interaction to view details
6. Print or export the summary to Excel

If you've selected only one mentor, you have the option to export to a PDF.

Editing and Deleting Mentor Interactions

Only the mentor can edit mentor interactions. To edit or delete mentor interactions, follow these steps.

1. Click the Educator Development header
2. Click **Mentor Interactions** under Tools & Reports
3. Use the menu to select a single mentor assignment or all (if applicable)
4. From the mentor interaction log, click the date under Date Submitted
5. Click **Edit Log** at the top of the summary to make changes to the mentor interaction, or click **Delete Log** to delete it
6. Click **Submit**

Mentor Reports

Use the available mentoring reports to monitor assignments and interactions. For details on running reports, refer to the Run PD Reports section.

Initiatives

Initiatives are programs that you can associate with activities. Participants can search for activities tied to a particular initiative. Assign users to initiatives to speed the process of enrolling a group of users in an activity.

Initiative: Certification in Health and Public Service [Back to Manage Initi](#)

Administrators will attend these courses to earn district certification in health hazards, policies and procedures.

Audience:
School and District Administrators

Department:	HITH & HUMAN SERVICES CLUSTER
Contact Info:	217 555 1888
Contact Person:	Dr. Jones
Initiative Dates:	1/16/2012 - 6/22/2012
Edit Archive Delete	

Create Initiatives

PD Planner administrators can create professional development initiatives and enroll or remove participants from the initiatives in PD Planner. Use enrollment in an initiative to determine eligibility for PD activities.

To create an initiative:

1. Click the Educator Development header
2. In Tools & Reports under Tools, click **Manage Initiatives**
3. Click **Create New Initiative**
4. Enter a title and other optional information as appropriate, and click **Submit**

Add Activities to Initiatives

When you create an activity, associate it with one or more initiatives.

Initiatives:
[Add/Edit Initiative](#)

Initiatives ✖

[Select all](#) | [Clear](#)

<input checked="" type="checkbox"/> Certification in Health and Public Service	<input type="checkbox"/> Aspiring Principal
<input type="checkbox"/> Early Childhood	<input type="checkbox"/> Principal Excellence
<input type="checkbox"/> School Curriculum and Assessment	<input type="checkbox"/> TPG Initiative

[Cancel](#) [Save](#)

To add details to activities associated with an initiative:

1. On the Activities & Resources tab of an initiative, indicate whether each activity is required or optional for enrolled participants
2. Add a "finish by" date as needed
3. Click **Save**

Requirement	Name	Type	Finish by
Required	Health and Public Service Workshop	Activity	02/27/2013
Optional	Advanced Topics in Public Safety	Activity	

Enroll and Remove Participants from Initiatives

PD Planner administrators manage enrollment in initiatives. Enrolled participants view their initiatives on the Initiatives tab of their My PD Profile page. Also, participants can search for available PD activities related to an initiative.

To enroll or remove participants:

1. On the Educator Development Dashboard, click **Manage Initiatives**
2. Click the initiative title
3. Click the Enrollment tab
4. Click **Enroll Participants**
5. Use the fields to narrow the search results and select the participant
6. Click **Go**
7. Select the participant or participants, then click **Enroll Participants**

Select users one page at a time. The selections that appear on the page are the only selections that will be submitted to the system. You may have to repeat the process several times to select multiple users.

8. To remove participants from the Initiative Details page, select them and click **Remove Selected Participants**

Name	Job Category	Job Title	Institution	Viewed Resources	Registered Activities	Completed Activities	Days Until Next PD Due
SMITH, JASMINE			HALL SCHOOL	0	0	0	

Tracking Participants' Progress

On the Enrollment tab, PD administrators can also track the progress of enrolled users. Roll your cursor over the participant's name and select **Initiative Progress** from the menu that appears.

<input type="checkbox"/>	Name	Job Category	Job Title	Institution	No. of PD Not Started	Days Until Next PD Due
<input type="checkbox"/>	Accord, Alhaji-Ibrahim	N/A	N/A	Abraham Lincoln Middle	5	9
<input type="checkbox"/>	Aileru, Brain	N/A	N/A	Abraham Lincoln Middle	5	9
<input type="checkbox"/>	Aileru, DENISE	N/A	N/A	Abraham Lincoln Middle	5	9
<input type="checkbox"/>	Akinwande, Ayshea	Educator	MS-GRADE 6	Abraham Lincoln Middle	5	9
<input type="checkbox"/>	Aljbelli, CHRISTOPHER	Educator	MS-GRADE 6 TO 8	Abraham Lincoln Middle	3	9

Or, roll your cursor over the Educator Development page and click **Manage Initiatives**.

PD administrators will see how many participants have not started, how many have made progress, and how many have completed the activities and resources assigned to the initiatives.

This view shows up to five initiatives, starting with the one whose end date is nearest to the current today. It includes both optional and required activities and resources.

Title	Department	Start Date	End Date	Status	Participants Enrolled	Participants Completed	Required Activities	Required Resources
Certification in Health and Public Service Announcements	HLTH & HUMAN SERVICES CLUSTER	1/16/2012	6/22/2012	Active	2	0	0	0
Certification in Health and Public Service Announcements	HLTH & HUMAN SERVICES CLUSTER	1/16/2012	6/22/2012	Active	6	0	0	0

- When a user views a resource from search results or the detail page, the system will flag the resource as completed
- When a user has viewed all the resources and has completed and received credit for all the activities, the activity is considered completed

Edit, Archive, and Delete Initiatives

PD Planner administrators can edit or archive initiatives found on the Manage Initiatives page, but it's important to understand the difference.

Archiving an initiative removes it from initiative lists throughout the system, such as the Create Activity page, but keeps a record of the initiative in participants' PD plans and in the Manage Initiatives list.

Deleting an initiative removes it completely from the system, including from PD plans.

To edit, archive, or delete an initiative:

1. On the Educator Development Dashboard, click **Manage Initiatives**
2. Click the initiative title
3. Click **Edit Initiative** to make changes to the initiative; click **Archive** to inactivate the initiative; or click **Delete** to remove the initiative from the system

View Your Initiatives

As a user assigned to an initiative, navigate to My PD Profile and click the Initiatives tab to see a list of initiatives for which you are enrolled. Click the initiative name to view the details associated with that initiative.

You'll see whether or not you meet eligibility requirements, what is required to complete the initiative, and what progress you've made in completing the initiative.

If you don't meet the eligibility requirements, you will see a list of all the requirements and the prerequisites. If the prerequisite is another activity, you can select it to see the details.

Initiative: ELA-S new teachers (2012-14) ?

✓ You are enrolled. [Back to Initiatives](#)

3 items need your attention.

This initiative is support qualification for ELA-S certification.

Audience:
New teachers to the district who would like to be qualified and teach in ELA-S positions.

Initiative Details

Department: ENGLISH AS 2ND LANG

Contact Person: Bob Hope

Start Date: 6/29/2012

End Date: 6/27/2014

Activities & Resources

Requirement	Name	Type	Finish by	Status
Optional	Kindergarten Standards Based Bulletin Board	Resource	7/31/2012	Viewed
Optional	Teaching 3rd Grade Science	Activity	7/27/2012	Not Registered
Required	Narrative: Writing About a Memorable Character	Resource	8/1/2012	Not Viewed
Required	Today's Activity	Activity	12/18/2012	Completed
Required	ELA 101	Activity	7/31/2012	Not Registered

Run PD Reports

PD Planner contains several report options for users with permissions at the school or district level. Each report comes with a specific set of columns that you format.

To generate a report:

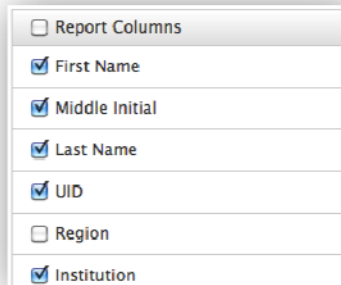
1. Roll your cursor over Educator Development and click **PD Reports**
2. Review the list of report types that are available
3. Click the title of a report

Choose a report that is likely to have data, such as the Profile report found under User Reports.

Use the Report Type menu to choose a different report as needed.

4. For question 1, choose which institution to include in the report
5. For question 2, choose which employees to include in the report
6. For Display options, check the columns to include in the report

The columns available will vary by the report selected, and some columns are selected by default.



Report Columns
<input checked="" type="checkbox"/> First Name
<input checked="" type="checkbox"/> Middle Initial
<input checked="" type="checkbox"/> Last Name
<input checked="" type="checkbox"/> UID
<input type="checkbox"/> Region
<input checked="" type="checkbox"/> Institution

7. Click **Run Report**
8. Choose or enter column values to narrow the report results and click **Apply Filters**
9. Click **Save Report**
10. Enter a report name and click **Save**

Save reports that you will run frequently. To access the report later, return to the Report Builder page and click **Go to Saved Reports**.

Question for Understanding

- What reports would be most useful for your role?

Practice

- Save a report to run again later

Glossary

Find explanations of terms used throughout the PD Planner system and PD Planner documents.

Activity: a professional development event. Activities may consist of up to 16 sessions, and can be held at additional dates and times. Participants cannot register for an activity they received credit for in an earlier section.

Activity Catalog: a listing of the professional development activities offered by the district or by individual schools. All individuals see upcoming activities offered by the district or by their school.

Activity status: the state of an activity relative to a participant. Find the activity status in the Activity Participation section of the school and district summaries, or on the Activities tab of your PD Profile. Possible statuses include:

- Registered - the attendee is registered for the activity and session attendance and final credit have not yet been submitted
- Completed - the attendee has been awarded final credit for the activity
- Incomplete - the attendee was not awarded final credit for the activity
- Pending Approval - a school or district administrator must approve the activity

Check your district's PD settings to verify who is responsible for approval. This status is for activities with requests only (internal or external).

- Approved - the activity has been approved (for activities with requests only)
- Not approved - the activity was not approved (for activities with requests only)

External Facilitator: an activity facilitator who is not an employee of the district

Externally Submitted Recertification Request: an activity not offered through the district or any of the district's schools, and submitted by an individual

Facilitation Log: a list of the activities that a facilitator has led or is scheduled to lead

Final Credit: credit awarded when an activity session is completed

Individual: a teacher or school/district staff member who participates in activities to reach professional goals

Initiative: a district program that users are assigned to that can be associated with activities

Instance: one complete offering of an activity (including all sessions, if more than one). Different instances of the same activity have the same activity information (such as audience, related initiatives, or associated standards), but different scheduling information (such as date/time, location, or facilitator). Scheduling instances of an activity is a way to hold PD activities that are offered again at a later date and time.

Internal Facilitator: an employee of the institution designated to facilitate activities who is assigned as a facilitator in the system

Mentee: someone who is being mentored

Mentor: an individual assigned to advise another teacher in the school. School administrators assign mentors. Mentors are responsible for logging interactions with their mentees.

Mentor Interaction: contact between a mentor and mentee, logged by the mentor. Types of mentor interactions include observations, pre- or post-observation meetings, and group meetings.

Mentor Log: a listing of mentor interactions by mentor/teacher pairing

PD Goal: a goal set by an individual related to a standard or a content area. Set and update goals using the PD Goals tab of the individual's PD profile.

PD Profile: an individual's summary of PD goals, activity participation, and mentor interactions. Staff members who are facilitators can access their facilitation logs through the PD Summary section of their PD profiles.

Pre-registration Approval: permission from an administrator to register for an activity

Recertification Request: an application for an internal activity (an activity in the catalog) requiring pre-registration approval, or for an external activity

School activity: an activity created by a school administrator that is available to staff members at that school

Section: a specific time and location that the activity (topic) is offered. For example, if the activity is Chemistry 101, the Section could be: Mon, Wed, Fri / 8:00 AM / in the Science Hall.

Session: every instance that the event takes place. In the example above, a session would be one specific class meeting, such as Monday, Sept. 1. Each date that the meeting occurs is a new session.

Session Attendance: a record of who attended an activity session that is saved by the facilitator

Session Attendance Summary: for an activity, a list of how many sessions each individual attended. The summary appears on the Submit Final Credit page.

Standard: principles associated with activities, mentor interactions, and PD goals. Filter and report activity participation by the standards addressed.

System Operator: a user role that is assigned to individuals who will perform configuration tasks, such as assigning reviewer rights and customizing field names

User: an individual in the system. Each user has a unique sign in (email address and password) and home page.

Verification: a school or district administrator's acknowledgement that an individual has completed an activity and earned activity credit

Waitlist: a list of individuals who wish to register for an activity that has reached the maximum number of attendees

Walk-in Attendee: an individual who attends an activity session without registering ahead of time. Activity facilitators add walk-in attendees to the Session Attendance page.