

















## Creating Plans

- Create a new plan using  icon; Enter Name, Type/Location, School Year, Review/Approve Dates, Title 1, Click to Use ESF
  - \* Lock Plan, or add users to access plan
- OR from Search - Locate plan,  to edit plans

### SEARCH ICONS

-  Edit Plan
-  Copy a plan; edit Type/Location, Year and Name
-  Delete plans from the list; plans can be restored after deleted
- Click Deleted Plans (bottom) and  to restore

### PLAN ICONS

-  Add sections to your plan (Cover Sheet, Vision, SiteBase, Resources, Goals/Objective/Strategies, Custom, Needs Assessment, Attachments or Forms – click all that apply, click add)
-  Plan Overview
-  Edit plan piece
-  Delete page
-  Mark page complete for your checklist
-  Checklist – View all complete/incomplete sections of the plan
-  Plan Settings – Click to modify plan dates/users/access to plan
-  Print: Click to print or save as .pdf




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## Additional Features

### COMPREHENSIVE NEEDS ASSESSMENT

- Add CNA page
  - \*  Focus Area to add Strengths, Weaknesses, Needs and Summary
  - \* Click Data Sources to check the sources used; click save
  - \*  Upload Files
  - \* Mark complete: click to mark area complete
-  Meetings
  - \* Print blank sign in sheets, or one with attendees
  - \* Add Minutes and Agenda Items

### ADDITIONAL FEATURES

- Add text based Notes (bottom of the screen)
-  Upload Files on far left of screen or add new attachments section to plan with Pages
-  Online Forms (integrated with FormWorks) can be added on the left of the screen or click add new on top right to insert Forms section within Pages
- Monitor Strategy Progress with multiple graphs and charts

### CUSTOMIZING SETTINGS

- Any District/Campus Admin can edit settings:
  - \* General – Lock campus access
  - \* Resources – Select from master list and/or add new resources
  - \* Positions Responsible – Select from master list and/or add new positions