

















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