

#### Act 48 Tutorial Guide

Building an Item to Submit Previously Earned Hours to PERMS



## Please refer to the notes below for detailed instructions of each step.

Down here! This is where detailed instructions of the steps will appear for each slide. If you would like to make this section larger, click and drag the three grey dots above this text box upwards.



# Step 1 - Creating an Item

							Suppor		nin User chool Portal s   Logout
I Menu	My Supe	rvision It	tems		Add Item Select Tag	Active	• Sea	ch	Q,
Supervision Management	Status 9	Complete 0	Pending 8		Compliance Item Name 0	Act 48 0	Start Date 9	End Date 0	Actions
All items My Supervision items	9	2/2	0 Pending	Published	2019-01-21 Problem Solving	Ø	01/21/2019	01/21/2019	View
Pending Verification     Expires Soon	0	12/12	0 Pending	Published	Acceptable Use Policy		08/18/2017	11/23/2018	View
45 Expired All Users' Progress 1	0	17/18	0 Pending	(7555574)	Acknowledgment and/or Sign-Off Item		09/01/2018	09/30/2018	View
Templates Add Item	0	1/25	0 Pending	Published	Act 114 Federal Criminal History Background Check Clearance (Revised)				View
My Compliance Items     User Management	· •	2/5	1 Pending	Fublished	Act 151 PA Child Abuse Background Check Clearance				View
Group Management	0	3/10	0 Pending	Published	Act 34 PA Criminal History Background Check Example				View
Questionnaire Management	•	0/0	0 Pending	Published	Act 44 - Emergency Drills		01/01/2019	01/30/2019	View
Reporting		0/0	0 Pending	Published	Act 44 - Emergency Plan Review		08/01/2019	08/31/2019	View
Portal Management	<b>ا</b> ا	1/2	1 Pending	(TELESCORE)	Act 44 - Mandated Trainings	Ø	07/01/2018	06/30/2019	View
	Θ	0/0	0 Pending	Published	Act 44 - School Board Report		07/01/2018	06/30/2019	View
		0/0	0 Pending	Patrioted	Act 44 - School Climate Survey		07/01/2018	06/30/2019	View

From the Supervision Management submenu...

1. Select Templates

							Suppor	✓ Adm Example Sc I Message	
Menu	Complia	ince Item	ıs		Add Item Select Tag #	Template	e Sear	ch	Q
Supervision Management	Status 0	Complete 0	Pending 0		Compliance Item Name 8	Act 48 0	Start Date 0	End Date 0	Actions
All terms	۲	0/0		Template	Acceptable Use Policy Template		08/01/2017	08/31/2017	View
Expires Soon     Expired	Θ	0/0		Template	Acknowledgment and/or Sign-Off Item Template		08/15/2018	08/31/2018	View
My Supervision Items All Users' Progress	۲	0/0		Template	Act 114 Federal Criminal History Background Check Clearance				View
Templates Add trem	•	0/0		Template	Act 151 PA Child Abuse Background Check Clearance Template		_		View
My Compliance Items	•	0/0		Template	Act 34 PA Criminal History Background Check Clearance Template		_		View
User Management		0/0		Template	Act 44 - Emergency Drills Template		12/01/2018	12/30/2018	View
Group Management	۲	0/0		Template	Act 48 Item (Feedback Form Only) Template		08/21/2018	08/21/2018	View
Questionnaire Management Reporting		0/0		Template	Act 48 Item (Physical Sign-In and PD Feedback Form) Template		08/20/2018	08/20/2018	View
Portal Management		0/0		Template	Act 48 Item (Physical Sign-In Only) Template		06/01/2018	06/01/2018	View
		0/0		Template	Act 48 Item (Submission of Previously Earned Hours) Template		09/01/2018	09/01/2018	View
		0/0		Template	Antihazing Law (PDE Required) Template		07/01/2018	06/30/2019	View

From the list of Templates, locate the template called "Act 48 Item (Submission of Previously Earned Hours) Template"

1. Select View

<u> </u>	MDIN				→ Admin User	
	MPLY					
	Y EDULINK				Support Messages Log	
Men Men	10	Act 48 Item (Submission of Previously Earned Hours)			Template Actigos 🗸	
🕝 Supe	ervision Management	Template			Duplicate 2	Л
Add II     Add II	Pending Verification Expires Soon Expired Appendition Items tens' Progress plates	Cycle Progress: Description: Act 48 item Instructions: <u>NO ACTION IS REQUIRED</u> . The purpose of this item is to submit previously earned Act 48 hours. No action is required. Note - When the Act 48 hours for this item have been successfully submitted to PERMS, you will receive an email notification. Resource Links - Documents	Compliance Cycle Type: Start Date: End Date: Recurrence: Person of Contact: Approval Stages: User Requirements: Reminders:	Item Timeline 09/01/2018 09/01/2018 Not Applicable Act 48 Coordinator Nothing Required of User		
🖸 Repo	orting					
Ports	tal Management	<b>x x</b>			25 0	

From the item's detail page...

- 1. Select Actions
- 2. Select Duplicate (from the Actions button drop down menu)

Note: This will copy the template to your portal so that you can customize it to the unique needs of your district.

		✓ Admin User Example School Portal Support   Messages   Logout
III Menu	Edit Compliance Item	Graft Close Publish Save
Supervision Management	Title: *  Act 48 Item (Submission of Previously Earned Hours) Template Copy  Make Private  Of O O Not visible to other supervisors.	*
Pending Verification     Expires Soon	Description: * Reminders	No reminders currently exist.
	Act 48 item Questionnaire	None selected
My Supervision Items All Users' Progress	Resources	No resources currently exist
	Compliance Cycle Type: * Recurrence	Not setup
	Item Timeline   Approval Stages	No approval stages currently exist.
My Compliance Items	Start Date * Tags	None selected
User Management		
	Instructions: *	
Group Management	✓ B / U & x, x <sup>1</sup> Ti+ 4 Be+++ B B	
Questionnaire Management	- k 🖉 🔯 🗇 C	
Reporting	NO ACTION IS REQUIRED. The purpose of this item is to submit previously	
Portal Management	earned Act 48 hours. No action is required. Note - When the Act 48 hours for this item have been successfully submitted to PERMS, you will receive an email notification.	

On the Edit Compliance Item page...

1. Edit the Title to the name of the Act 48 event (i.e., 2019-01-21 Bullying Prevention Training).

Note: The title of the event is what will be recorded at PERMS. Also, by including the date of the event at the beginning of the title, your Act 48 items will be organized and listed by school year on the All Items page or My Supervision Items page.

1. Modify the Start and End Dates by clicking on the calendar icons.

Note: Typically, the start and end date are the same date... that is the day of the event.

	Add Item	Edit Compliance Item			Oratt Close Publish Save
0	My Compliance Items	Start Date * End Date *		Tags	wone selected
	User Management	January 21, 2019	=	Act 48	
		Instructions: *			
*	Group Management	- B / U 6 x, x <sup>1</sup> ∏• 6 ℝ•••• Ⅲ (			
0	Questionnaire Management	- k / D 0 0			
0	Reporting	NO ACTION IS REQUIRED. The purpose of this item is to submit	previously		
	Portal Management	earned Act 48 hours. No action is required.	-		
		Note - When the Act 48 hours for this item have been successfully s PERMS, you will receive an email notification.	ubmitted to		
		Owner			
		Admin User 🌶			
		Person of Contact *			
			-	1	
		What is required of the user? *	+ Add Person	1	
		Completed Questionnaire			
		Uploaded Evidence/Attachment			
		No User Requirements			

Scroll down and for Person of Contact...

1. Select Add Person

Add to	Edito	Compliance Item		<b>673</b> 0	Re Publish Save
• Ny	Add User(s)				× **
	Search	Results	Roster Preview		Seve Roster
-	Search for User(s)	Search within Results:	The following users will be	e added to the roster: 4	Remove All
<b>0</b> %	admin	Enter a name or email address here	Admin User (dmyers690	11+adminuser@gmail.com)	Remove -
© re 0 to	PAETEP Buildings (0) PAETEP Roles (0) Group (0)	Cathy Admin (cathybenzenhoefer+admin@gmail.com) Example Admin (dmyers6901+eo@gmail.com) Olivia Admin (dmyers6901+olivia@gmail.com) Sally Admin (sawyersally9+admin@gmail.com) SchoolAdmin (SchoolAdmin@edulinkinc.com) Andrew Administrator 01 (amcomplytest+A01@gmail.com) Administrative Assistant (dmyers6901+pimsassist@gmail.com) Jane Doe - District Admin (sams/mmr@gmail.com)	3 Add - Add - Add - Add - Add - Add -		
	Reset Get All Users Sean	_2			_

From the Add Users pop-up tool...

- 1. Type name in search bar
- 2. Select search
- 3. Click the appropriate name or click add to move the name to the Roster Preview
- 4. Check that name appears under Roster Preview
- 5. Select Save Roster

		✓ Admin User Example School Portal Support   Messages   Logout
Menu	Edit Compliance Item	Ovate Close Publish Save
<ul> <li>Supervision Management</li> <li>Alterns         <ul> <li>Pending Verification</li> <li>Expired</li> <li>My Supervision Items</li> <li>Expired</li> <li>My Supervision Items</li> <li>Alt Items</li> </ul> </li> <li>Wy Compliance Items</li> <li>User Management</li> <li>Group Management</li> <li>Questionnaire Management</li> <li>Reporting</li> <li>Portal Management</li> </ul>	Title: *   2019-01-21 Reading Assessment   Description: *   Act 48 item   Compliance Cycle Type: *   Item Timeline   Start Date *   Instructions: *   Instructions: *   Instructions: *   NO ACTION IS REQUIRED. The purpose of this item is to submit previously earned Act 48 hours. No action is required.   Note - When the Act 48 hours for this item have been successfully submitted to PERMS, you will receive an email notification.	ake Private  The Nore on Not visible to other supervisors.  Iteminders No reminders currently exist.  Duestionnaire None selected Iteources Noresources currently exist  Itecurrence Not setup  (1) approval stages (1) approval stages  IteminUsers  Approvers  Approvers  AdminUsers  AdminUsers AdminUsers  AdminUsers  AdminUsers AdminUsers AdminUsers  AdminUsers  AdminUsers AdminUsers AdminUsers  AdminUs

Scroll up and from the right column...

- 1. Select the green Approval Stages link, then the blue +Add Supervisor Stage of Approval link
- 2. Type "Act 48 Approver" for Name/Position
- 3. Select the blue +Add Approver link, and add the appropriate approver form the Add Users pop-up tool

0	Edit Compliance Item	Bruft Close Publish Save				
Questionnaire Management	- • • 0 0 0	Admin User #				
Reporting	NO ACTION IS REQUIRED. The purpose of this item is to submit previously	+ Add Approver				
Reporting     Portal Management	earned Act 48 hours. No action is required. Note - When the Act 48 hours for this item have been successfully submitted to	+ Add Supervisor Stage of Approval and related Supervisor(s)				
	PERMS, you will receive an email notification.	Tags None selected				
		Act 48 O Active - (1.5) hours				
		Act 48 Hours: * 3 No ( Yes 1.5				
	Owner	Provider: *				
	Admin User /	Example School Activity Type: *				
	Person of Contact *					
	Admin User 🕱	Act 48 Professional Development Activity				
	What is required of the user? * + Add Person	Course Type: * 5				
	Completed Questionnaire	Teaching and Learning Professional Development				
	Uploaded Evidence/Attachment	Sub Type: *				
	No User Requirements	Teaching Techniques and Strategies				
		Apply to Para-Educator *				
		CEC Performance Based Standard				
		:				

From the green Act 48 details section...

- 1. Select the green Act 48 link
- 2. Click on the No/Yes toggle to change the position to "Yes"
- 3. Type in the appropriate number of hours
- 4. Choose the appropriate Activity Type
- 5. Choose the appropriate Course Type
- 6. Choose the appropriate Sub-Type
- 7. Select Save, Publish, and then Close



### Step 2 - Adding Users

Menu	2019-01-21 Reading Assessment		Published Actions v
Supervision Management All Items Pending Verification Pending Ve	Cycle Progress: Description: Act 48 item Instructions: <u>NO ACTION IS REQUIRED</u> . The purpose of this item is to submit previously earned Act 48 hours. No action is required. Note - When the Act 48 hours for this item have been successfully submitted to PERMS, you will receive an email notification.	Compliance Cycle Type: Start Date: End Date: Recurrence: Person of Contact: Approval Stages: User Requirements: Reminders:	Item Timeline 01/21/2019 01/21/2019 Not Applicable Admin User Act 48 Approver O Nothing Required of User
My Compliance Items     User Management     Group Management     Questionnaire Management	Resource Links - Documents -	Act 48: Hours: 1.5 Provider: Example School Activity Type: Act 48 Professic Course Type: Teaching and Le Course Sub Type: Teaching Te	earning Professional Development
Reporting     Portal Management	Roster No user cycles currently in the roster. Approve Reopen Modify Due Date Nudge Message Remove Priv	t Cu	rrent Cycle 01/21/2019 - 01/21/2019 Add Users

From the Item's Details page...

1. Select the blue Add Users icon button

Add User(s)				2
earch	Results		Roster Preview	Save Roster
earch for User(s)	Search within Results:		The following users will be added to the second sec	Remove A
Search by name/email address	Enter a name or email address here		Chris Abbott (chris@edulinkinc.com)	Remove -
PAETEP Buildings (0)	_	Add All (179)		Q
PAETEP Roles (0)	Estate Aarons (eddle@edulinkinc.com) 2	Add +		
	Natalie Aarons (notolie@edulinkinc.com)	Add +		
	Ned Aarons (ned@edulinkinc.com)	Add +		
	Skip Abbott (Skjpp@edulinkinc.com)	Add +		
	Tyler Abbott (tyler@edulinkinc.com)	Add +		
	Carol B Able (carol@edulinkinc.com)	Add +		
	Maya Able (maya@edulinkinc.com)	Add +		
	Todd Able (todd@edulinkinc.com)	Add +		
	Molly Acker (molly@edulinkinc.com)	Add +		
	Phil Acker (phil@edulinkinc.com)	Add +		
	Teacher1 Act48 (dmyers6901+act48teacher1@gmail.com)	Add +		
	Teacher2 Act48 (dmyers6901+act48teacher2@gmail.com)	Add +		
	Teacher99 Act48 (dmyers6901+act48teacher99@gmail.com)	Add +		
	Teacher3 Act48 (dmyers6901+act48teacher3@gmail.com)	Add +		
eset Get All Users Dearch	acher4 Act48 (dmyers6901+act48teacher4@gmail.com)	Add +		

There are three basic ways to add users. You may add users from a list of all users, individually, or by utilizing groups.

Option 1 - Add users from a list of all users in your system

- 1. Select the blue Get All Users button
- 2. Select the the appropriate names under the results column, adding them to the Roster Preview
- 3. Review names under Roster Preview
- 4. Select Save Roster

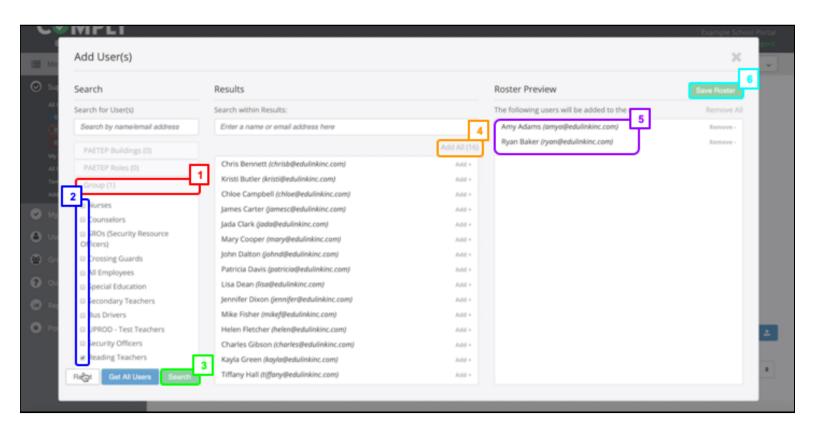
Note: Upon Save Roster, users will be assigned to the item and each user will receive an email. The email that each user receives, includes the important details of the item (i.e., instructions, due date, person of contact, act 48 details, etc.). The email also includes a hyperlink, allowing the user to quickly access the item within Comply.

					Example School Portal
I Me	Add User(s)				×
⊘ su	Search	Results	4	Roster Preview	Save Roster
ALI	Search for User(s)	Search within Results:	7	The following users will be added to the	Remove All
ē	ryan	Enter a name or email address here		Amy Adams (amyo@edulinkinc.com)	Remove -
G	PAETEP Buildings (0)	3	idd All (1)	Ryan Baker (ryan@edulinkinc.com)	Remove -
AD	PAETEP Roles (0)	MaryAnn Teacher (dmyers6901+moryann@gmail.com)	Add +		
Ten	Group (0)			*	
•					
O Us					
🕒 Gri					
<b>0</b> %					
0 ~~					
0.0					<u>+</u>
	Rent Get All Users Search				•

**Option 2** - Add users by searching for individual names

- 1. Type the name of user
- 2. Select the green Search button or hit Return key on your keyboard
- 3. Select the appropriate name from the results column, adding to the Roster Preview column
- 4. Repeat steps 1-3 for all users in attendance
- 5. Review names under Roster Preview
- 6. Select Save Roster

Note: Upon Save Roster, users will be assigned to the item and each user will receive an email. The email that each user receives, includes the important details of the item (i.e., instructions, due date, person of contact, act 48 details, etc.). The email also includes a hyperlink, allowing the user to quickly access the item within Comply.



#### Option 3 - Add users by utilizing groups

Note - this option assumes that Groups have been created in advance. To learn more about creating or managing Groups, from your Comply portal select the green Support link. Form the FAQ section of the Support page, locate the article on How to create and manage groups.

- 1. Select Group
- 2. Check the groups that were involved
- 3. Select the green Search button
- 4. Select Add All
- 5. Review names under Roster Preview, removing users if desired
- 6. Select Save Roster

Note: Upon Save Roster, users will be assigned to the item and each user will receive an email. The email that each user receives, includes the important details of the item (i.e., instructions, due date, person of contact, act 48 details, etc.). The email also includes a hyperlink, allowing the user to quickly access the item within Comply.



#### Step 3 - Approving Users

	Expires Soon	2019-01-21 Readin	g Assessment					(Field		Actions	~
	Expired My Supervision Rems All Users' Progress Templates Add Rem	Act 48 hours. No action is a	required. Is for this item have been su	s to submit previously earned accessfully submitted to PERMS,	Person of Contac Approval Stages: User Requiremen Reminders:		Admin User Act 48 Approv Nothing Requi				
4 10 7 10	My Compliance Items User Management Group Management Questionnaire Management Reporting Portal Management	Resource Links - Documents - Roster Approve Reopen 1	Modify Due Date Nudge	Message Remove P	Act 48: Hours: 1.5 Provider: Exampl Activity Type: Act Course Type: Tea Course Sub Type:	48 Profession ching and Lea : Teaching Tech	ming Profession Iniques and St	onal Developmen		Add Users	1
		0 000 T	Name O,	Due Date Completed Ad	1.48 - Al 🛛 🛛 🖗	History Evid	ence Notes				
© An NotSub	ny Adams - Submission Status mont.		Adams, Amy	m 01/21/2019		ື	B	Actions	۷	Approve	×
7258141 Hours*	I	2	Baker, Ryan	m 01/21/2019	e.n (i)	ື	e	Actions	v	Approve	¥.
Submitted		E	]							25	5 0

From the Roster section of the Item's Details page...

Prior to Approving, modify the Act 48 hours for individual users where appropriate. Note - if a user was the presenter, you may want to increase their hours. If a user left the session early or arrived late, you may want to reduce their hours. To modify an individual user's Act 48 hours....

- 1. Form the Act 48 roster column, select the Act 48 clock icon for an individual user
- 2. From the Act 48 details pop-up, edit the number of hours as needed
- 3. Select Save, then Close. Repeat as needed for other users.

Expires Sol	20	2019-01-21 Reading Assessment									lahed	Actions	~
		Act 48 hours. No act	48 hours for this item have been			Person of Conta Approval Stages User Requireme Reminders:			Approve	r O red of User			
<ul> <li>My Compliance Items</li> <li>User Management</li> <li>Group Management</li> <li>Questionnaire Management</li> </ul>	ent ment	Act 48: Resource Links Hours: 1.5 - Provider: Example School - Activity Type: Act 48 Professional Development Activity Documents Course Type: Teaching and Learning Professional Develop - Course Sub Type: Teaching Techniques and Strategies							nal Developme	nt			
<ul> <li>Reporting</li> <li>Portal Manager</li> </ul>	ment	Apple Prop	m Modify Due Date Nudg	pe Message Remov				urrent Cyc		1/2019 - 01/21/2	019\$	Add Users	4
		* 0	Adams, Amy	m 01/21/2019		@ \$2	ອ	È		Actions	v	Approve	•
Action * Approved Completed Date: January 21, 2019			1 3 	m 01/21/2019		(i) (1.5)	5	) =	8	Actions	~	Approve 25	- - - -

To approve all users at one time...

- 1. Change the Roster filter from Priority to Pending. Note this will sort the list by those users that are pending and needing approved.
  - a. Make sure all users are listed (25 users per page, 50 users per page, 100 users per page, etc.)
    - Check the select all users box
- 2. Select the bulk Approve button
- 3. Change Completed Date to the end date of the inservice
- 4. Select Ok

b.

Note: Upon Approve, hours will be automatically submitted to PERMS. The submission process can take up to 30 seconds to process. While the system is waiting for a response from PERMS, the Act 48 clock icon for each user will turn blue, indicating that the status is pending. Once submitted to PERMS, the Act 48 clock will either turn green (successful submission/hours received) or turn red (submission error). If there is an error in submitting hours to PERMS (indicated by the red clock), the Approver will receive an email indicating the error. To fix any errors and resubmit, click on the red clock, read the error message sent back from PERMS, make the necessary adjustments, then click Save and Resubmit.



#### Creating Your Next Act 48 Item

							Suppo		nin User chool Portal Is   Logout
I Menu	My Sup	ervision It	tems		Add Item Select Tag	Active	• Sea	ch	Q,
Supervision Management	Status I	Complete 8	Pending 8		Compliance Item Name 8	Act 48 0	Start Date 8	End Date 0	Actions
All Items My Supervision Items	0	2/2	0 Pending	Published	2019-01-21 Problem Solving	Ø	01/21/2019	01/21/2019	View
Pending Verification     Expires Soon	0	2/2	0 Pending	Published	2019-01-21 Reading Assessment	Ø	01/21/2019	01/21/2019	View
45 Expired All Users' Progress	0	12/12	0 Pending	(*******	Acceptable Use Policy		08/18/2017	11/23/2018	View
Templates Add Item	0	17/18	0 Pending	Published	Acknowledgment and/or Sign-Off Item		09/01/2018	09/30/2018	View
My Compliance Items     User Management	0	1/25	0 Pending	(7000000)	Act 114 Federal Criminal History Background Check Clearance (Revised)		-		View
Group Management	• •	2/5	1 Pending	Published	Act 151 PA Child Abuse Background Check Clearance				View
Questionnaire Management	0	3/10	0 Pending	Published	Act 34 PA Criminal History Background Check Example				View
Reporting		0/0	0 Pending	Published	Act 44 - Emergency Drills		01/01/2019	01/30/2019	View
Portal Management		0/0	0 Pending	Published	Act 44 - Emergency Plan Review		08/01/2019	08/31/2019	View
		1/2	1 Pending	Published	Act 44 - Mandated Trainings	Ø	07/01/2018	06/30/2019	View
		0/0	0 Pending	Published	Act 44 - School Board Report		07/01/2018	06/30/2019	View

The most efficient way to create your next Act 48 item is to <u>duplicate</u> one that you have already created. Duplicating an item saves you time by copying over details/settings that will remain the same.

To create your next Act 48 item, return to your My Supervision Items page...

1. Select View next to the item you want to duplicate

	← Admin User Example School Portal Support   Messages   Logou
Menu	2019-01-21 Reading Assessment
Supervision Management All terms 99 Pending Verification 97 Expires Soon 45 Expired My Supervision Items All Users' Progress Templates Add tern	Cycle Progress:       Compliance Cycle Type:       Item Timeline       Duplicate         Description:       Start Date:       01/21/2019       Delete         Act 48 item       End Date:       01/21/2019       Person of Contact:       Admin User         Not ACTION IS REQUIRED. The purpose of this item is to submit previously earned Act 48 hours. No action is required.       Note - When the Act 48 hours for this item have been successfully submitted to PERMS, you will receive an email notification.       Note nemail notification.       Voting Required of User
My Compliance Items     User Management     Group Management     Questionnaire Management     Reporting     Portal Management	Act 48:         Resource Links       Hours: 1.5         -       Provider: Example School         -       Activity Type: Act 48 Professional Development Activity         Documents       Course Type: Teaching and Learning Professional Development         -       Course Sub Type: Teaching and Learning Professional Development         -       Roster         Approve       Reopen       Modify Due Date       Nudge       Message       Print       Current Cycle       01/21/2019 + Add Users       1
	Priority       Image: Name       Q_L       Due Date       Completed       Act 48 - Al       Image: Notest constraints       Notest constraints         Image: Notest constraints       Image: Notes

From the item's detail page...

- 1. Select Actions
- 2. Select Duplicate (from the Actions drop down menu)

Note - Once duplicated, you will be taken to the Edit Compliance Item page. As you did for the previous item, edit the details as needed, including the Title, Person of Contact, Dates, Approval Stage, and Act 48 details. Then Save, Publish, and Close. Then Add Users and Approve.