

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

Admin User

Example School Portal

Support | Messages | Logout

Menu

Supervision Management

All Items

My Supervision Items

39 Pending Verification

Expires Soon

45 Expired

All Users' Progress

Templates

Add Item

My Compliance Items

User Management

Group Management

Questionnaire Management

Reporting

Portal Management

My Supervision Items

Add Item

Select Tag

Active

Search

Status	Complete	Pending	Compliance Item Name	Act 48	Start Date	End Date	Actions
	2/2	0 Pending	Published 2019-01-21 Problem Solving		01/21/2019	01/21/2019	View
	12/12	0 Pending	Published Acceptable Use Policy		08/18/2017	11/23/2018	View
	17/18	0 Pending	Published Acknowledgment and/or Sign-Off Item		09/01/2018	09/30/2018	View
	1/25	0 Pending	Published Act 114 Federal Criminal History Background Check Clearance (Revised)		—	—	View
		2/5	1 Pending Published Act 151 PA Child Abuse Background Check Clearance		—	—	View
	3/10	0 Pending	Published Act 34 PA Criminal History Background Check Example		—	—	View
	0/0	0 Pending	Published Act 44 - Emergency Drills		01/01/2019	01/30/2019	View
	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		07/01/2018	06/30/2019	View
	0/0	0 Pending	Published Act 44 - School Board Report		07/01/2018	06/30/2019	View
	0/0	0 Pending	Published Act 44 - School Climate Survey		07/01/2018	06/30/2019	View

From the Supervision Management submenu...

1. Select Templates

Admin User

Example School Portal

Support | Messages | Logout

Menu

Supervision Management

All Items

Pending Verification

Expires Soon

Expired

My Supervision Items

All Users' Progress

Templates

Add Item

My Compliance Items

User Management

Group Management

Questionnaire Management

Reporting

Portal Management

Compliance Items

Add Item

Select Tag

Template

Search

Status	Complete	Pending	Compliance Item Name	Act 48	Start Date	End Date	Actions
	0/0	Template	Acceptable Use Policy Template		08/01/2017	08/31/2017	View
	0/0	Template	Acknowledgment and/or Sign-Off Item Template		08/15/2018	08/31/2018	View
	0/0	Template	Act 114 Federal Criminal History Background Check Clearance		---	---	View
	0/0	Template	Act 151 PA Child Abuse Background Check Clearance Template		---	---	View
	0/0	Template	Act 34 PA Criminal History Background Check Clearance Template		---	---	View
	0/0	Template	Act 44 - Emergency Drills Template		12/01/2018	12/30/2018	View
	0/0	Template	Act 48 Item (Feedback Form Only) Template		08/21/2018	08/21/2018	View
	0/0	Template	Act 48 Item (Physical Sign-In and PD Feedback Form) Template		08/20/2018	08/20/2018	View
	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

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Menu

- Supervision Management
 - All Items
 - Pending Verification
 - Expires Soon
 - Expired
 - My Supervision Items
 - All Users' Progress
 - Templates
 - Add Item
- My Compliance Items
- User Management
- Group Management
- Questionnaire Management
- Reporting
- Portal Management

Act 48 Item (Submission of Previously Earned Hours)

Template

Template Actions

Duplicate

Cycle Progress:

Description:

Act 48 item

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.

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

25

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.

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

My Compliance Items

User Management

Group Management

Questionnaire Management

Reporting

Portal Management

Edit Compliance Item

DraftClosePublishSave

Tags
Act 48
None Selected

Start Date *
January 21, 2019

End Date *
January 21, 2019

Instructions: *

B

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x²

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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.

Owner

Admin User

Person of Contact *

+ Add Person

What is required of the user? *

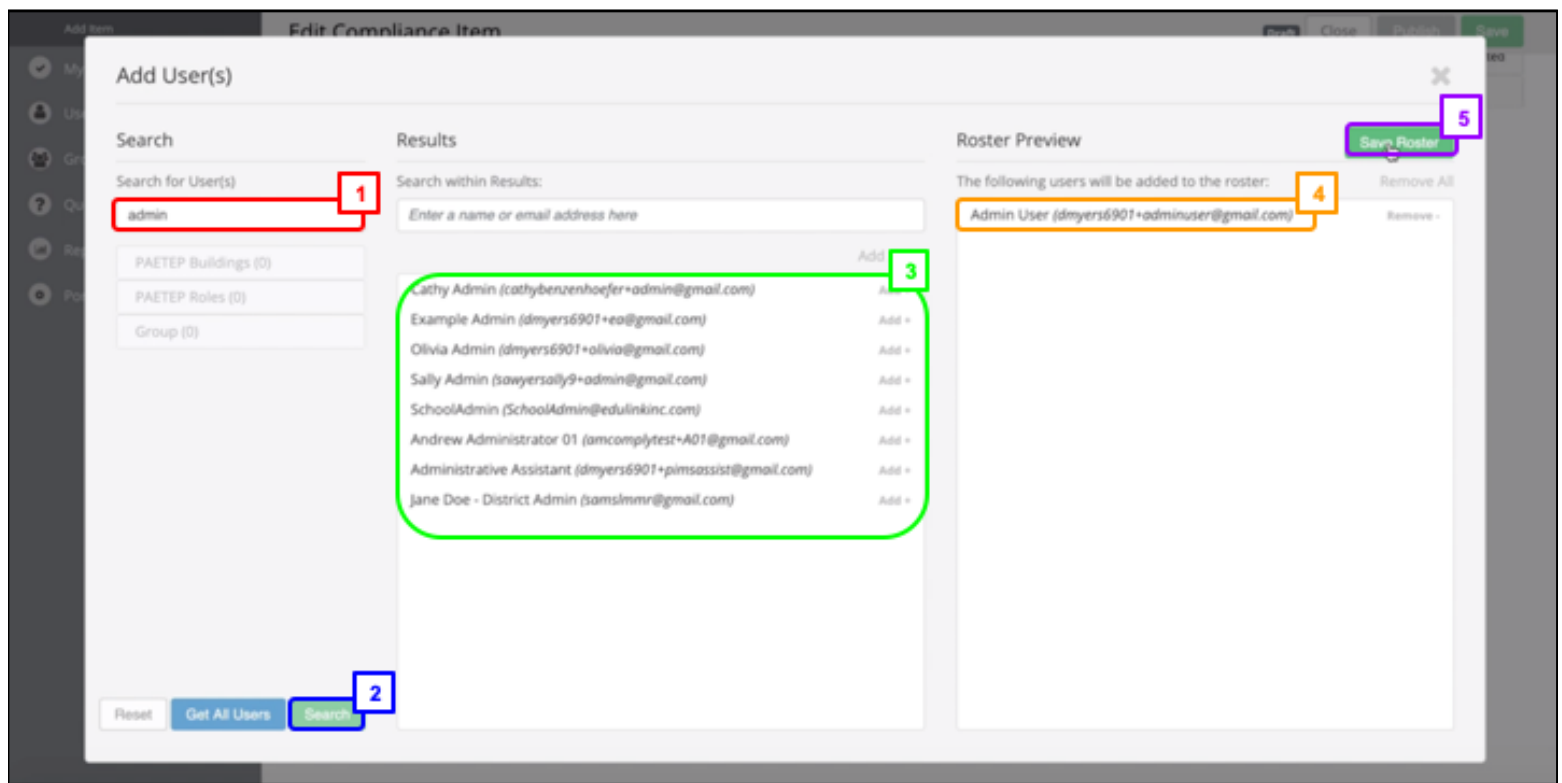
☐ Completed Questionnaire

☐ Uploaded Evidence/Attachment

☒ No User Requirements

Scroll down and for Person of Contact...

1. Select Add Person



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

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Admin User
Example School Portal
Support | Messages | Logout

Menu

Edit Compliance Item [Draft] [Close] [Publish] [Save]

Supervision Management

- All Items
 - Pending Verification
 - Expires Soon
 - Expired
- My Supervision Items
- All Users' Progress
- Templates
- Add Item

My Compliance Items

- User Management
- Group Management
- Questionnaire Management
- Reporting
- Portal Management

Title: 2019-01-21 Reading Assessment

Description: Act 48 item

Compliance Cycle Type: Item Timeline

Start Date: January 21, 2019 **End Date:** January 21, 2019

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.

Make Private
off ☐ On Not visible to other supervisors.

Reminders No reminders currently exist.

Questionnaire None selected

Resources No resources currently exist

Recurrence Not setup

Approval Stages (1) approval stages

Which supervisor(s) are responsible for approving this compliance item? *

Name/Position Act 48 Approver

Approvers

Admin User

+ Add Approver

+ Add Supervisor Stage of Approval and related Supervisor(s)

Tags None selected

Act 48

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 from the Add Users pop-up tool

The screenshot shows the 'Edit Compliance Item' form. On the left is a sidebar with 'Questionnaire Management', 'Reporting', and 'Portal Management'. The main form has a top bar with 'Draft', 'Close', 'Publish', and 'Save' buttons. The 'Save' button is highlighted with a black box and the number 7. Below this is a section for 'Owner' and 'Person of Contact', both with 'Admin User' dropdowns. A note states: 'NO ACTION IS REQUIRED. The purpose of this item is to submit previously earned Act 48 hours. No action is required.' Below the note are three radio buttons for 'What is required of the user?': 'Completed Questionnaire', 'Uploaded Evidence/Attachment', and 'No User Requirements'. The right side of the form contains several fields: 'Tags' with a dropdown showing 'Act 48' (highlighted with a red box and number 1); 'Act 48 Hours' with a toggle for 'No' and 'Yes' (the 'Yes' option is selected and highlighted with a blue box and number 2); 'Hours' with a text input field containing '1.5' (highlighted with a green box and number 3); 'Provider' with a text input field containing 'Example School'; 'Activity Type' with a dropdown showing 'Act 48 Professional Development Activity' (highlighted with an orange box and number 4); 'Course Type' with a dropdown showing 'Teaching and Learning Professional Development' (highlighted with a purple box and number 5); 'Sub Type' with a dropdown showing 'Teaching Techniques and Strategies' (highlighted with a cyan box and number 6); 'Apply to Para-Educator' with a toggle for 'Yes'; and 'CEC Performance Based Standard' with a dropdown.

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

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Menu

Supervision Management

All Items

Pending Verification

Expires Soon

Expired

My Supervision Items

All Users' Progress

Templates

Add Item

My Compliance Items

User Management

Group Management

Questionnaire Management

Reporting

Portal Management

2019-01-21 Reading Assessment

PublishedActions

Cycle Progress:

Description:

Act 48 item

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.

Resource Links

-

Documents

-

Roster

No user cycles currently in the roster.

ApproveReopenModify Due DateNudgeMessageRemovePrint

Compliance Cycle Type:

Start Date:

End Date:

Recurrence:

Person of Contact:

Approval Stages:

User Requirements:

Reminders:

Act 48:

Hours: 1.5

Provider: Example School

Activity Type: Act 48 Professional Development Activity

Course Type: Teaching and Learning Professional Development

Course Sub Type: Teaching Techniques and Strategies

Item Timeline

01/21/2019

01/21/2019

Not Applicable

Admin User

Act 48 Approver

Nothing Required of User

Current Cycle

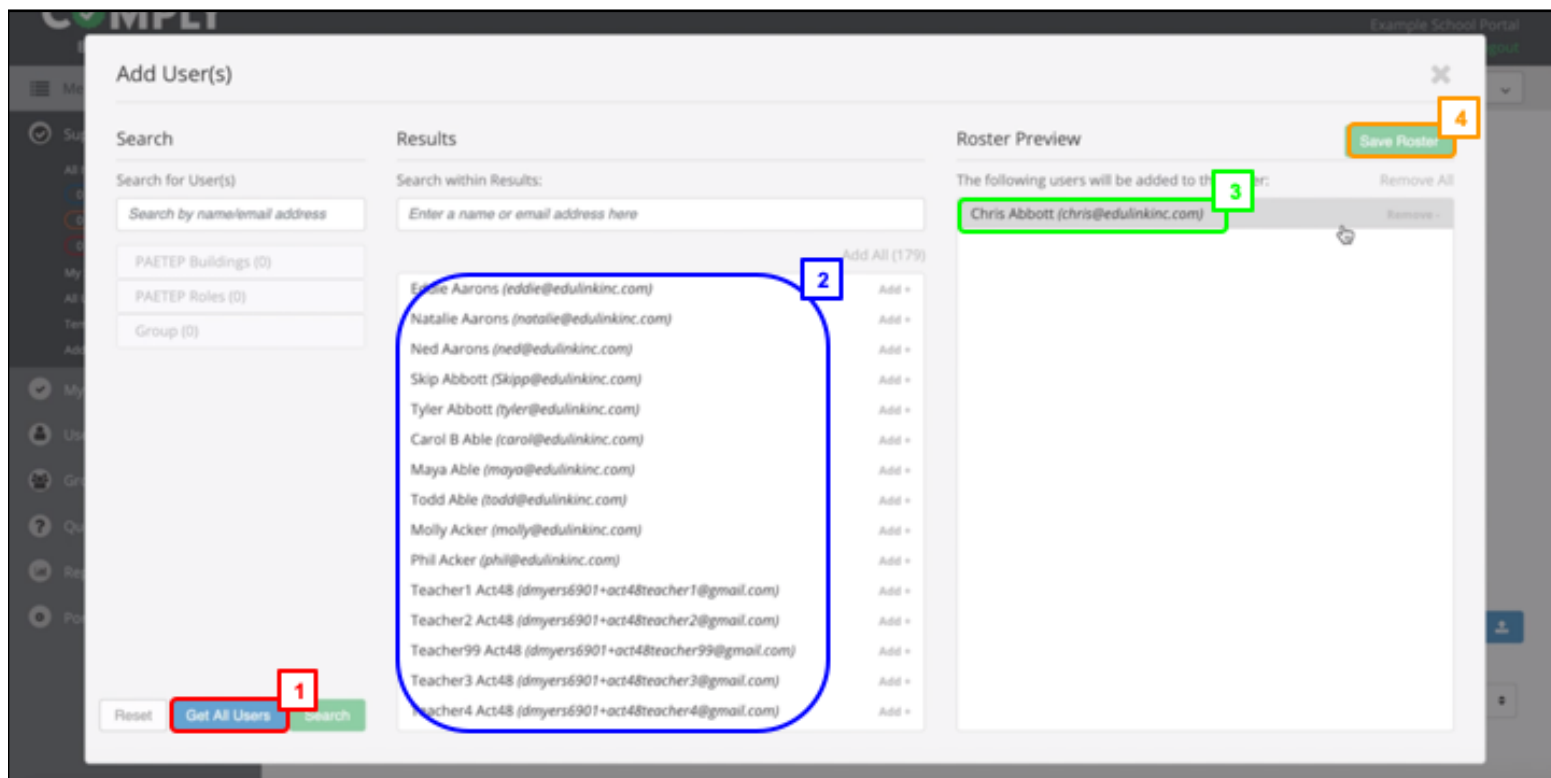
01/21/2019 - 01/21/2019

Add Users

25

From the Item's Details page...

1. Select the blue Add Users icon button

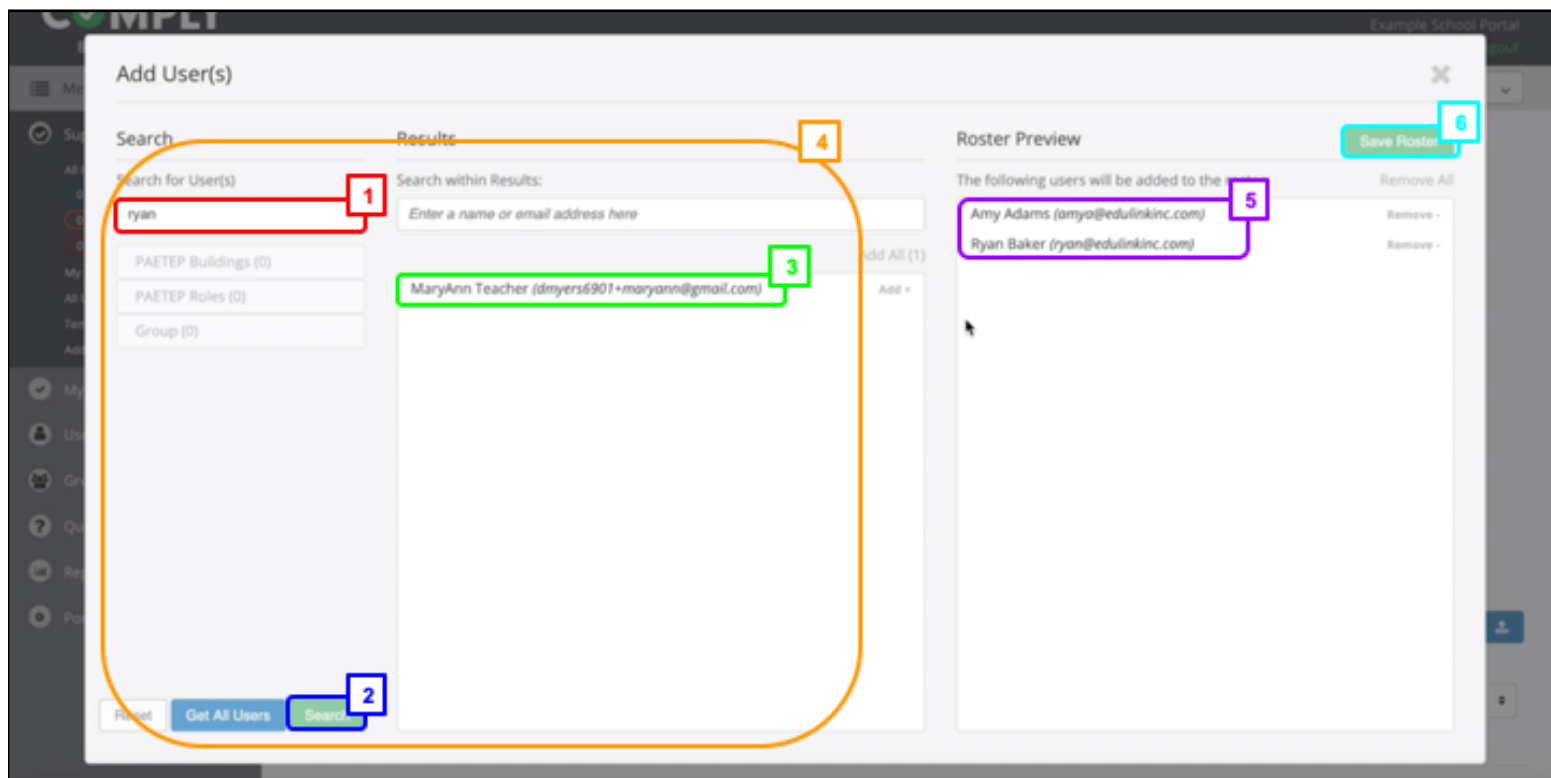


There are three basic ways to add users. You may add users from a list of all users, individually, or by utilizing groups.

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

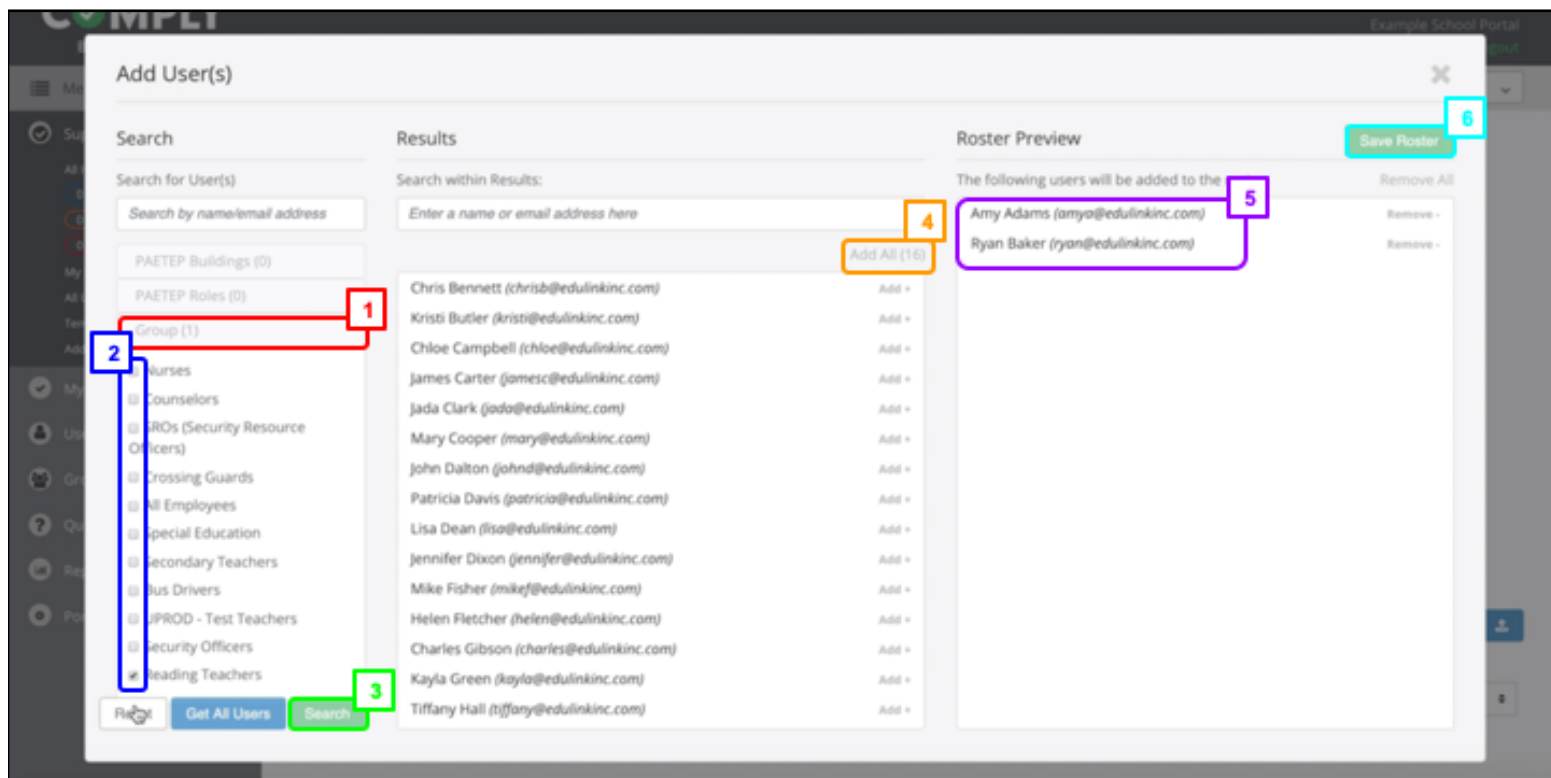
Note: Upon Save Roster, users will be assigned to the item and each user will receive an email. The email that each user receives, includes the important details of the item (i.e., instructions, due date, person of contact, act 48 details, etc.). The email also includes a hyperlink, allowing the user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



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. From 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

2019-01-21 Reading Assessment Published Actions

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.

Resource Links
 -

Documents
 -

Roster

Approve Reopen Modify Due Date Nudge Message Remove Print

Current Cycle: 01/21/2019 - 01/21/2019 Add Users

Person of Contact: Admin User
Approval Stages: Act 48 Approver
User Requirements: Nothing Required of User
Reminders:
 Act 48:
 Hours: 1.5
 Provider: Example School
 Activity Type: Act 48 Professional Development Activity
 Course Type: Teaching and Learning Professional Development
 Course Sub Type: Teaching Techniques and Strategies

Amy Adams - Submission Status
 Not Submitted
 ID: 7258141
 Hours: 1.5
 Submitted Date: January 21, 2019
 Save Close

Name	Due Date	Completed	Act 48 - All	History	Evidence	Notes
Adams, Amy	01/21/2019					Actions Approve
Baker, Ryan	01/21/2019		(1.5)			Actions Approve

25

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. From 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.

The screenshot displays the '2019-01-21 Reading Assessment' page. On the left is a navigation sidebar with options like 'Expires Soon', 'Expired', 'My Supervision Items', 'All Users' Progress', 'Templates', 'Add Item', 'My Compliance Items', 'User Management', 'Group Management', 'Questionnaire Management', 'Reporting', and 'Portal Management'. The main content area shows instructions, resource links, documents, and a roster table. The roster table has columns for Name, Due Date, Completed, and Actions. A modal window is open for 'Adams, Amy' with a 'Completed Date' field set to 'January 21, 2019'. A red box highlights the '25' users per page limit, and a red box highlights the 'a' (all) option for the filter.

2019-01-21 Reading Assessment

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.

Resource Links
 -

Documents
 -

Roster

Approve (b) (2) Modify Due Date Nudge Message Remove Print

Current Cycle 01/21/2019 - 01/21/2019 Add Users

Name	Due Date	Completed	Act 48 - All	History	Evidence	Notes
Adams, Amy	01/21/2019					
	01/21/2019		(1.5)			

Action *

Approved

Completed Date: January 21, 2019 (3)

25 (a)

4

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.)
 - b. 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

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

COMPLY

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Admin User

Example School Portal

Support | Messages | Logout

Menu

Supervision Management

All Items

My Supervision Items

39 Pending Verification

Expires Soon

Expired

All Users' Progress

Templates

Add Item

My Compliance Items

User Management

Group Management

Questionnaire Management

Reporting

Portal Management

My Supervision Items

Add Item

Select Tag

Active

Search

Status	Complete	Pending	Compliance Item Name	Act 48	Start Date	End Date	Actions
	2/2	0 Pending	Published 2019-01-21 Problem Solving		01/21/2019	01/21/2019	View
	2/2	0 Pending	Published 2019-01-21 Reading Assessment		01/21/2019	01/21/2019	View
	12/12	0 Pending	Published Acceptable Use Policy		08/18/2017	11/23/2018	View
	17/18	0 Pending	Published Acknowledgment and/or Sign-Off Item		09/01/2018	09/30/2018	View
	1/25	0 Pending	Published Act 114 Federal Criminal History Background Check Clearance (Revised)		---	---	View
	2/5	1 Pending	Published Act 151 PA Child Abuse Background Check Clearance		---	---	View
	3/10	0 Pending	Published Act 34 PA Criminal History Background Check Example		---	---	View
	0/0	0 Pending	Published Act 44 - Emergency Drills		01/01/2019	01/30/2019	View
	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		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 duplicate 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

COMPLY BY EDULINK

Admin User | Example School Portal | Support | Messages | Logout

2019-01-21 Reading Assessment

Cycle Progress: [Progress Bar]

Description: Act 48 item

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.

Resource Links

Documents

Roster

Approve Reopen Modify Due Date Nudge Message Remove Print

Current Cycle: 01/21/2019 - 01/21/2019 Add Users

Priority	Name	Due Date	Completed	Act 48 - All	History	Evidence	Notes
✓	Baker, Ryan	01/21/2019	01/21/2019	(1.5)			

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.