Best Practice – Level I to Level II Certificate Tracking (Cranberry Area SD)

How To – To create this item on your portal, follow the directions below.

1) Log into Comply
2) Supervision Management → Templates
3) Search for and locate the Template called *Best Practice – Level I to Level II Certificate Tracking (Cranberry Area SD)* → View
4) From the item's detail page, select Actions → Duplicate
5) From the edit compliance item page, customize the item to the unique needs of your school district.
    a. Title – edit as needed
    b. Description – edit as needed
    c. Compliance Cycle Type – leave as User Timeline
    d. Start Date and End Date – ignore / not applicable
    e. Instructions – edit as needed
    f. Person of Contact – add person(s) of contact
    g. What is required of the user? – leave as is (box checked for upload evidence/attachment)
    h. Reminders – edit as needed
    i. Questionnaire – ignore / not applicable
    j. Resources – leave current links / add district specific links or documents as needed
    k. Recurrence – ignore / not applicable
    l. Approval Stages – add at least one stage of approval
    m. Tags – add tag as needed
    n. Act 48 – ignore / not applicable
6) Save, Publish, and Close the item.
7) From the Roster section, bulk upload a list of users and their due dates.
    a. Create a CSV file with three columns.
        i. First column should be the email address of the user
        ii. Second column should be left blank/empty
        iii. Third column should be the user's due date (xx/xx/xxxx)
    b. Upload CSV file by selecting the blue Upload Users icon (next to the blue Add Users button)
    c. Once uploaded, users will be assigned to the item, and they will receive an email. Included in the email is their due date, person of contact, instructions, and a link back to the item within Comply.