

Act 48 Tutorial Guide

Building an Item in Advance to Collect Feedback and Submit 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		h in User hool Portal s Logout
III Menu	My Sup	ervision It	tems		Add Item Select Tag	Active	Sear	ch	Q
Supervision Management	Status 0	Complete 0	Pending 8		Compliance Item Name 9	Act 48 0	Start Date 9	End Date 0	Actions
All items My Supervision Items	1 O	0/2	2 Pending	Published	2019-01-21 Math Assessment	Ø	01/21/2019	01/21/2019	View
45 Pending Verification	0	1/1	0 Pending	Published	2019-01-21 Problem Solving	Ø	01/21/2019	01/21/2019	View
68 Expired All Users' Progree 1	٢	2/2	0 Pending	Published	2019-01-21 Reading Assessment	Ø	01/21/2019	01/21/2019	View
Templates Add item	0	12/12	0 Pending	Published	Acceptable Use Policy		08/18/2017	11/23/2018	View
My Compliance Items	0	17/18	0 Pending	Published	Acknowledgment and/or Sign-Off Item		09/01/2018	09/30/2018	View
User Management Group Management	0	1/25	0 Pending	Published	Act 114 Federal Criminal History Background Check Clearance (Revised)				View
Questionnaire Management	<u>ه</u> ا	2/5	1 Pending	Published	Act 151 PA Child Abuse Background Check Clearance				View
Reporting	0	3/10	0 Pending	Published	Act 34 PA Criminal History Background Check Example		_		View
Portal Management		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	Ø	07/01/2018	06/30/2019	View

From the Supervision Management submenu...

1. Select Templates

Mmu Compliance Items Add Item Select Tag • Template • Search Q Supervision Management • Status • remge · remge · · remge ·								Suppor	✓ Adm Example Sc Message	
All Rems Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparison of Previously Earned Hours) Template Image: Control of Comparis Image: Control of Co	I Menu	Complia	ance Item	าร		Add Item Select Tag •	Templat	e 🕈 🛛 Sear	ch	٩
Image: Construction of the product Version of Previously Earned Hours) Template 0x00000000000000000000000000000000000	Supervision Management	Status 0	Complete 8	Pending 8		Compliance Item Name 0	Act 48 0	Start Date 0	End Date 0	Actions
Image: Separed My Supervision Items 0.00 Templates 0.010 Templates 120000000 Templates 120000000 Templates 120000000 Templates 1200000000 Templates 1200000000 Templates 12000000000000000000000000000000000000			0/0		Template	Acceptable Use Policy Template		06/01/2017	06/31/2017	View
Al Gent Progress 000 Templates Wew Templates 000 Templates Wew My Compliance Items 000 Templates Wew My Compliance Items 000 Templates Vew My Compliance Items 000 Templates Vew My Compliance Items 000 Templates Act 34 PA Criminal History Background Check Clearance Template Vew Storup Management 000 Templates Act 44 - Emergency Drills Template 12002018 08202018 08202018 Vew Group Management 000 Templates Act 48 Item (Physical Sign-In and PD Feedback Form) Template 0 08202018 08202018 Vew Reporting 010 Templates Act 48 Item (Submission of Previously Earned Hours) Template 0 08012018 Vew Portal Management 0 010 Templates Act 48 Item (Submission of Previously Earned Hours) Template 0 08012018 Vew Portal Management 0 010 Templates		•	0/0		Template	Acknowledgment and/or Sign-Off Item Template		06/15/2018	08/31/2018	View
Add teen Image: Compliance Items Im		۲	0/0		Template	Act 114 Federal Criminal History Background Check Clearance				View
Image: Management Im			0/0		Template	Act 151 PA Child Abuse Background Check Clearance Template		-		View
Image: Comp Management I	My Compliance Items		0/0		Template	Act 34 PA Criminal History Background Check Clearance Template				View
Outside Act 48 Item (Physical Sign-In and PD Feedback Form) Template Outside Act 48 Item (Physical Sign-In and PD Feedback Form) Template Outside Act 48 Item (Submission of Previously Earned Hours) Template Outside Act 48 Item (Submission of Previously Earned Hours) Template Portal Management Outside Act 48 Item (Submission of Previously Earned Hours) Template Outside Act 48 Item (Submission of Previously Earned Hours) Template Portal Management Outside Act 48 Item (Submission of Previously Earned Hours) Template Outside Act 48 Item (Submission of Previously Earned Hours) Template			0/0		Template	Act 44 - Emergency Drills Template		12/01/2018	12/30/2018	View
Image: Portal Management 0/0 Template Act 48 Item (Submission of Previously Earned Hours) Template O 0x01/2018 0x01/2018 0x01/2018 0x001/2018		۲	0/0		Template	Act 48 Item (Physical Sign-In and PD Feedback Form) Template	0	06/20/2018	06/20/2018	Vey
Portal Management Or0 Template Antihazing Law (PDE Required) Template extor/2018 ob/30/2019 View		۲	0/0		Template	Act 48 Item (Submission of Previously Earned Hours) Template	Ø	05/01/2018	09/01/2018	View
Ord Review Template Oscol 2017 08/31/2017 View		۲	0/0		Template	Antihazing Law (PDE Required) Template		07/01/2018	06/30/2019	View
			0/0		Template	Board Policy Review Template		06/01/2017	06/31/2017	View
Ord Revention (Practice Item) Template 12/01/2018 12/01/2018 View			0/0		Template	Bullying Prevention (Practice Item) Template		12/01/2018	12/01/2018	View

From the list of Templates, locate the template called "Act 48 Item (Physical Sign-In and PD Feedback Form) Template"

1. Select View

			Suppr	Admin User Example School Portal ort Messages Logo 1
III Menu	Act 48 Item (Physical Sign-In and PD Feedback Form)		Tempi	Action 2
Supervision Management	Template			Duplicate
Al terms Pending Verification Expired My Supervision items Al User/ Progress Templates Ad item My Compliance items Verification Group Management Questionnaire Management Reporting Portal Management	Cycle Progress: Description: Act 48 item Instructions: Duplicate this template to use on your portal. Once duplicated, edit as needed the instructions: Duplicate this template to use on your portal. Once duplicated, edit as needed the instructions, resource links, documents, start and end dates, person of contact, reminders, questionnaire, etc. Then assign users and publish. Purpose - The purpose of this item is to track attendance at an upcoming in-service, gather feedback about the session, and submit Act 48 hours to PERMS. Step 1 - Please physically sign-in at the in-service. Step 2 - At the completion of the in-service, complete the questionnaire to provide feedback (click the blue Complete Questionnaire button). Step 3 - When finished with the Questionnaire, be sure to click the green Submit for Approval button. Note - Once this compliance item is approved by the Act 48 Coordinator, your hours will be submitted to PERMS and you will receive an email. Resource Links	Compliance Cycle Type: Start Date: End Date: Recurrence: Person of Contact: Approval Stages: User Requirements: Reminders: 1 Day after the End Date Act 48: Hours: 1 Provider: Example School Activity Type: Kact 48 Profess Course Type: Teaching and Course Sub Type: Teaching	Learning Professional Development	

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.

C		~ Admin User
Menu	Edit Compliance Item	Event Close Publish Save
Supervision Management	Title: * 2019-01-21 Curriculum Development	Make Private Of OP on Not visible to other supervisors.
	Description: *	Reminders (1) reminders
	Act 48 item	Questionnaire Professional Development Feedback Form (Basic) Template Copy
My Supervision Items All Users' Progress	•	Resources No resources currently exist
	Compliance Cycle Type: *	Recurrence Not setup
Add Item	tem Timeline \$	Approval Stages No approval stages currently exist.
My Compliance Items	Start Date *	Tags None selected
User Management		2 Act 48
Group Management	Instructions: *	
	- B / ∐ 6 x, x ¹ Ti+ ♦ BL+++ 30 50	
Questionnaire Management	- • • 0 0 0 0	
Reporting	Duplicate this template to use on your portal. Once duplicated, edit as needed the	
Portal Management	instructions, resource links, documents, start and end dates, person of contact, reminders, questionnaire, etc. Then assign users and publish.	
	Purpose - The purpose of this item is to track attendance at an upcoming in-service, gather feedback about the session, and submit Act 48 hours to PERMS.	
	Step 1 - Please physically sign-in at the in-service.	
	Step 2 - At the completion of the in-service, complete the questionnaire to provide	

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. By including the date of the event at the beginning of the title, your Act 48 items will be organized and listed by 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: For most inservice events, the start and end date are the same date... that is, the day of the event.

1. Delete the red text appearing in the instructions box.

	Templates	Edit Compliance Item		Add User(s)		
	Add Item	Edit Compliance Item		Add User(s)		6
0	My Compliance Items	Start Date *	End Date *	Search Search for User(s)	Penuits 2 In within Results:	Rester Preview Record to the rooter: Remove Al
۵	User Management	January 21, 2019	January 21, 2	admin	e a name or email address here	Admin User (dmjersdill) ("vedminuseriligmed com) n
	Group Management	Instructions: •		PAGTEP Buildings (2) PAGTEP Buildings (2)	Cathy Admin Stathybersenhadjen-administigenal care)	-1 <u>4</u>
		$P = B = I = U = \Theta = x_1 = x^2 = T_1 + U$	• E	Group (B)	Example Admin (dmyeroBEC+sodgmal.con) Otica-Admin (dmyeroBEC+sodgmal.con) Safly Admin (SowerosHyth-solmingtproof, con)	Add -
9	Questionnaire Management	- • / 0 0 0			SchoolAdmin (SchoolAdmin@eduTokinc.com)	A80 -
e	Reporting	Step 2 - At the completion of the in-service feedback (click the blue Complete Question			Andreau Administrator III (ancumplyhosi-Alhiligenal.cum) Administrative Assistant, (alnyersill/01-yiimsesisti)(genal.cum) Sarie Doe - District Admin (samshmin/genal.cum)	Add
0	Portal Management	Step 3 - When finished with the Questionn Approval button. Note - Once this compliance item is appro- will be submitted to PERMS and you will re Owner Admin User Person of Contact * What is required of the user? * # Completed Questionnaire Uploaded Evidence/Attachment	aire, be sure to cl red by the Act 48	Pase Get Al class Based + Add Person	are Der - Der net Admin damsbinnengenat com	
		 Uploaded Evidence/Attachment No User Requirements 				

Scroll down and for Person of Contact...

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

III Menu	Edit Compliance Item	Event Close Publish Save
Supervision Management All tems all tems by Pending Verification by Expired by Supervision Items All Users' Progress Templates Add tem Wy Compliance Items	Title: * 2019-01-21 Curriculum Development Description: * Act 48 item Compliance Cycle Type: * Item Timeline Start Date * End Date *	Make Private or on Not visible to other supervisors. Reminders (1) reminders 1 Day after the End Date + Add Reminder Questionnaire Professional Development Feedback Form (Basic) Template Copy Include Questionnaire * (Manage) Professional Development Feedback Form (Basic) Template Copy
 User Management Group Management Questionnaire Management Reporting Portal Management 	January 21, 2019 January 21, 2019 Instructions: * * B I L S x, x* TI • • E • • • Image: Complete the questionnaire to provide feedback (click the blue Complete Questionnaire button). Step 3 - When finished with the Questionnaire, be sure to click the green Submit for Approval button. Note - Once this compliance item is approved by the Act 48 Coordinator, your hours will be submitted to PERMS and you will receive an email.	Resources No resources currently exist Recurrence No approval stages currently exist. Accrossil Stages No approval stages currently exist. Which supervisor(s) are responsible for approving this compliance item? 1 * Add Supervisor Stage of Accrossil and related Supervisor(s) 2 Tags None selected Act 48 1
	Owner	

Scroll up and from the right column...

- 1.
- Select the green Approval Stages link Select the blue +Add Supervisor Stage of Approval and Related Supervisor(s) 2. link

Menu	Edit Compliance Item		(Svaft)	Close Publish Save
Supervision Management All Items	Title: * 2019-01-21 Curriculum Development	0	Make Private or OII on Not visible to other supervisors.	
Expires Soon Expired	Description: *		Reminders	(1) reminders
My Supervision Items	Act 48 item		1 Day after the End Date	/ ×
All Users' Progress Templates	Compliance Cycle Type: *		Ouestionnaire Professional Development Feed	+ Add Reminder
Add item	Item Timeline	٥	Include Questionnaire * (Manage)	ack rorm (basic) remplate copy
My Compliance Items	Start Date * En	d Date *	Professional Development Feedback Form (Basic) Template	e Copy \$
Add User(s)		7 × 🗎		
Search Results	Raster Preview		Resources	No resources currently exist
admin 3 dr athlin file admin		The added to the roster; Thereise All NF-salminuser@gmail.com; North	Recurrence	Not setup
PACTUP Buildings (D)		6	Approval Stages 0	(1) approval stages
Group-10 Duarryle Admit	aflybersenhoder-odninggnoli.com/ Au .jdnyers801-oddgnoli.com/ Aui - Ingers801-sakedgnoli.com/ Aui -	2	Which supervisor(s) are responsible for approving this con	npliance item?
Sally Admin.da Schoolinderer (Andrew Admin	nyarsalyih naiminidgenul cunit	lor	Name/Position Act 48 Approver	Į
	Anatoset, Utopenille'' yanasossi (genal.com) suss- 49. Admin (pansimeniggenal.com) suss-	25	Approvers	
				* Add Approver 2
Twee Constraint Date:			+ Add Supervisor Stage of Approvi	al and related Supervisor(s)

Within the Add Supervisor Stage of Approval section...

- 1. Type "Act 48 Approver" under Name/Position
- 2. Select the blue +Add Approver link

In the Add Users pop up menu...

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

Edit Compliance Item	Evant Close Publish Save
- k / D D C	Admin User M
will be submitted to PERMS and you will receive an email.	+ Add Approver
Owner	+ Add Supervisor Stage of Approval and related Supervisor(s)
Admin User 🖌	Tags 1 None selected
Person of Contact *	Act 48 Active - (1) hours
Admin User #	Act 48 Hours a 2 licable Hours:* 3
What is required of the user? * + Add Person	
Completed Questionnaire	Provider: *
Uploaded Evidence/Attachment	Example School
No User Requirements	Activity Type: *
	Act 48 Professional Development Activity
	Course Type: * 5
	Standards Area Curriculum and Assessment
	Sub Type: *
	Curriculum Development
	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, and Publish

		✓ Admin User Example School Portal Support Messages Logout
I Menu	Edit Compliance Item	Fublished Close Unpublish Save
Supervision Management All Items Pending Verification Expires Soon Expired My Supervision Items All Users' Progress Templates Add Item	Title: * 2019-01-21 Curriculum Development Description: * Act 48 item Compliance Cycle Type: * Item Timeline \$	Make Private or O on Not visible to other supervisors. Reminders (1) reminders Ouestionnaire Professional Development Feedback Form (Basic) Template Copy Include Questionnaire (Manage) Professional Development Feedback Form (Basic) Template Copy
My Compliance Items User Management Group Management	Start Date * End Date * January 21, 2019 Image: Constructions: * Instructions: * Image: Construction to the second	Resources No resources currently exist Recurrence Not setup Approval Stages (1) approval stages Tags None selected Act 48 © Active - (1) hours
Questionnaire Management Reporting Portal Management		

Before Closing the edit page and Adding Users, access the Professional Development Feedback Form and make any desired changes.

From the Edit Compliance Item page...

- 1. Select the green Questionnaire tab link
- 2. Select the green Manage button which will take you to the Questionnaire Management page

					Admin Example Schoo Messages	
Menu	View Al	Questionnaires		Add Questionnaire	Active •	٩.
Supervision Management	Status 0	Title 8	Created By 0	Last Modified 9	Actions	
All Items My Supervision Items	Graft	Emergency Drill Report Form	EduLink Admin	01/16/2019	Actions	v
All Users' Progress Templates	Published	Fire Drill Report (Monthly)	Admin User	03/27/2018	Actions	~
Add Item	Published	Inspection Form	EduLink Admin	05/04/2018	Actions	~
My Compliance Items User Management	Published	New Hire - Acknowledgment and Signature	EduLink Admin	03/27/2018	Actions	v
Group Management	(2010)	Practice Video Training	Admin User	04/26/2018	Actions	×
Questionnaire Management	Published	Professional Development Feedback Form (Basic)	EduLink Admin	12/06/2018	Actions	~
Reporting	Published	Professional Development Feedback Form (Basic) Template Copy	Admin User	01/27/2019	Actions	
Portal Management	Published	Request for Conference Approval Form (Kutztown Area 5D)	Example Admin	06/11/2018	Delete	-
	Published	School District PD Feedback Form	Admin User	01/27/2019	Duplicate	7
	Published	Student Assistance Program (SAP) - Policy and Training Acknowledgement	EduLink Admin	02/07/2018	Archive Preview	
	Passing	Suicide Awareness and Prevention - Policy and Training Acknowledgement	EduLink Admin	12/21/2017	Actions	~

From the Questionnaire Management page, locate the questionnaire called Professional Development Feedback Form (Basic) Template Copy. This is the questionnaire that was copied to your portal when you duplicated the item.

- 1. Next to the questionnaire, select Actions
- 2. Then select Edit from the dropdown menu

			Admin User Example School Pertai
🔳 Menu	Edit Questionnaire		Close Save Preview Un-publish
Supervision Management All terms My Supervision Items All Users' Progress	Form Title* Example School PD Form Description*		ţı
Templates Add Item	Professional development and in-service feedback form for attendees to complete following training session To begin:		
User Management Group Management Questionnaire Management	 Add (grab and drop) the Section item from the panel on the right to the gray panel below. Name the 2. If you want directions included on your questionnaire, add a Label/Instruction item. Rename the lab 3. Add questions as needed (Singleine Text, Multiline Text, Multiple Choice, Drop Down, and/or Check- you go. You can even add additional sections. 4. Save your work frequently. Click Preview to view your progress, and Publish (make the form active) v 	el and enter directions as Box.) You can add as mar	y questions as you want or duplicate questions as
Reporting Portal Management	Questions Display Title		2 Section
	 The instructor was well prepared and organized Strongly Agree Agree Disagree Strongly Disagree Advortee 	× A	Label/Instructions Singleline Text Multiline Text Multiple Choice Checkboxes

From the Edit Questionnaire page...

- 1. Change the title as needed (i.e., "Your School District Name" PD Form)
- 2. The templated questionnaire comes with a few basic questions. Edit, duplicate and/or delete the existing questions as needed. If desired, add more questions using Add tool box (select, drag, and drop questions into the working area as needed).
- 3. Click the green Save button to save your work. Click the blue Preview button to preview the questionnaire.
- 4. Select the white Close button to exit.

				Support	Admin U Example School Messages U	
I Menu	View All	Questionnaires	Add	Questionnaire	Active •	٩
Supervision Management	Status 0	Title 0	Created By 0	Last Modified 0	Actions	
Al Items 2	Published	Acceptable Use Policy Signature	EduLink Admin	04/09/2018	Actions	~
All Users' Progress Templates	Published	Acknowledgment and Electronic Signature	EduLink Admin	07/02/2018	Actions	~
Add Item My Compliance Items	PUBLISHED	Act 114 Federal Criminal History Background Check (UEID Number Submission)	EduLink Admin	12/14/2017	Actions	Ψ.
User Management	Published	Act 114 Federal Criminal History Background Check (UEID Number Submission)	Admin User	05/16/2018	Actions	~
Group Management	Published	Act 114 Federal Criminal History Background Check (UEID Number Submission) Template Copy Template Copy	Brad Ryba	12/04/2018	Actions	~
Questionnaire Management	Published	Act 151 PA Child Abuse Background Check Clearance	EduLink Admin	02/22/2018	Actions	~
Reporting	Published	Act 34 PA Criminal History Background Check Clearance	EduLink Admin	03/13/2018	Actions	*
 Portal Management 	Published	Act 44 - Emergency Drills	EduLink Admin	11/21/2018	Actions	~
	Published	Act 44 - Emergency Plan Review Acknowledgment and Electronic Signature	EduLink Admin	11/21/2018	Actions	~
	Published	Alcohol, Chemical and Tobacco Abuse Program Training Acknowledgement	EduLink Admin	01/29/2018	Actions	~
	Published	Antihazing Law - Policy Acknowledgement	EduLink Admin	01/22/2018	Actions	v

Leave the Questionnaire Management page, and navigate your way back to the Act 48 compliance item you were building.

- 1.
- Select Supervision Management Select the My Supervision Items tab 2.

							Suppor	✓ Adm Example Sit t Message	
🔳 Menu	My Si	pervision I	tems		Add Item Select Tag	Active	• Sea	ch	Q
Supervision Management	Stat	us 0 Complete 0	Pending 8		Compliance Item Name 0	Act 48 0	Start Date 0	End Date 0	Actions
All Items My Supervision Items	0	0/0	0 Pending	Published	2019-01-21 Curriculum Development	Ø	01/21/2019	01/21/2019	Vew
40 Pending Verification 7 Expires Soon		0/2	2 Pending	Published	2019-01-21 Math Assessment	ø	01/21/2019	01/21/2019	View
47 Expired All Users' Progress	•	1/1	0 Pending	Published	2019-01-21 Problem Solving	Ø	01/21/2019	01/21/2019	View
Templates Add Item		2/2	0 Pending	Published	2019-01-21 Reading Assessment	Ø	01/21/2019	01/21/2019	View
 My Compliance Items 	¢	12/12	0 Pending	Published	Acceptable Use Policy		06/18/2017	11/23/2018	View
User Management		17/18	0 Pending	Published	Acknowledgment and/or Sign-Off Item		09/01/2018	09/30/2018	View
Group Management Questionnaire Management	•	1/25	0 Pending	Published	Act 114 Federal Criminal History Background Check Clearance (Revised)		_	_	View
Reporting	1.0	2/5	1 Pending	Published	Act 151 PA Child Abuse Background Check Clearance				View
Portal Management	•	3/10	0 Pending	Published	Act 34 PA Criminal History Background Check Example				View
	0	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		06/01/2019	08/31/2019	View

From the My Supervision Items page...

1. Select View next to your created item



Step 2 - Adding Users

	Expires Soon Expired		21 Curri	culum Develop	oment						Published	Actions	¥.		
	My Supervision Items			while items in the tends	mandance		a la condea		Person of Contact:	Admin User					
	All Users' Progress						ng in-service,		Approval Stages:	Act 48 Approver 🛛					
	Templates Add Item	Step 1 - Plea	se physically	sign-in at the in-servi	ce.				User Requirements: Reminders:	Questionnaire Required					
ø	My Compliance Items					questionnaire	to provide		1 Day after the End Date						
8	User Management			th the Questionnaire	be sure to	click the gree	n Submit for		Act 48: Hours: 1						
۲	Group Management								Provider: Example School Activity Type: Act 48 Professio Course Type: Standards Area						
0	Questionnaire Management					8 Coordinato	r, your hours	Nill	Course Sub Type: Curriculum		rn,				
C	Reporting	Resource Lin	ics												
0	Portal Management														
		Documents													
		-													
		Questionnair	re Preview												
		Example Sch	ool PD Form												
		Documents - Questionnaire Preview Example School PD Form Roster No user cycles currently in the roster. Approve Reopen Modify Due Date Nudge Message Remove													
		No user cycle	es currently in	the roster.											
		Approve	Reopen	Modify Due Date	Nudge	Message	Remove	Print	t Cu	rrent Cycle 01/21/2019 - 0	1/21/2019 \$	Add Users	Ľ		
												u.			
													25 €		

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

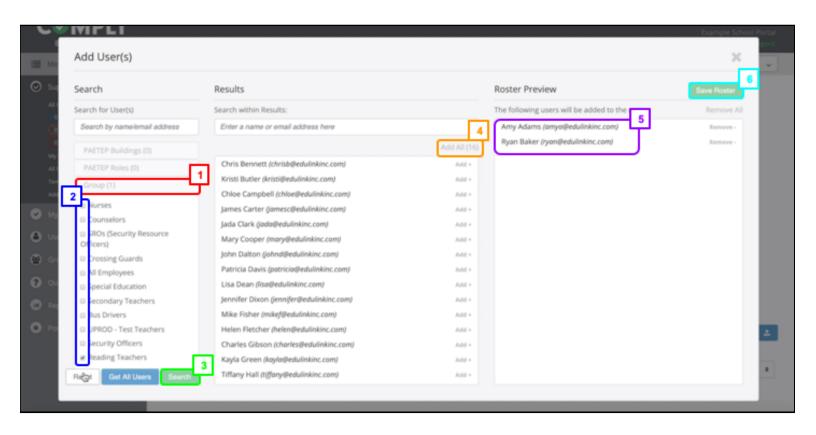
Note: Upon Save Roster, users will be assigned to the item and each user will receive an email. The email that each user receives, includes the important details of the item (i.e., instructions, due date, person of contact, act 48 details, etc.). The email also includes a hyperlink, allowing the user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

L.					Example School	Portal
I Me	Add User(s)				×	v
⊘ sup	Search	Results 4		Roster Preview	Save Roster	
ALI	Search for User(s)	Search within Results:		The following users will be added to the	Remove All	
e (ryan	Enter a name or email address here		Arny Adams (amyo@edulinkinc.com) 5	Remove -	
G	PAETEP Buildings (0)	3	Add All (1)	Ryan Baker (ryon@edulinkinc.com)	Remove -	
My Alti	PAETEP Roles (0)	MaryAnn Teacher (dmyers6901+maryann(ligmail.com)	Add +			
Ten				•		
18						
O 14						
O Us						
(2) Gr						
0 %						
C Re						
0 %						±
						_
	Ret Al Usors Search					۰

Option 2 - Add users by searching for individual names

- 1. Type the name of user
- 2. Select the green Search button or hit the 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 that will be 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 will be in attendance
- 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.

				Comparison of the second
Menu Menu	2019-2-18 Curriculum Development (Ex - Collect Feedback)			Relation v
 Supervision Management All term Pending Verification Expires Soon Expires Expired My Sopervision Items All User's Progress Templates My Compliance Items User Management Group Management Questionnaire Management Reporting Portal Management 	Cycle Progress: Description: Act 48 item Instructions: Step 1 - Please physically sign-in at the in-service. Step 2 - At the completion of the in-service, complete the questionnaire to provide feedback. Step 3 - Submit for Approval Note - Once the sign-in sheet for this in-service is received by the Act 48 Coordinator, your hours will be submitted to PERMS and you will receive an email. Resource Links Documents Documents Professional Development Feedback Form (Bask) Roster Roster Roster Roster Resource Links Documents Documents Resource Links Documents Documen	Compliance Cycle Type: Start Date: End Date: Recurrence: Person of Contact: Approval Stages: User Requirements: Reminders: 1 Day after the End Date Act 48: Hours: 5 Provider: Example School Activity Type: Teaching and Lear Course Type: Teaching and Lear Course Sub Type: Teaching Tech CEC Performance Based Standar	ning Professional Development niques and Strategies nd: Instructional Strategies	00/16/2019 - 00/18/2019 2
	Priority Name Q Due Date Complete	Act 48 - All 8		Notes

NEXT STEPS:

Now that the item is built and users have been assigned, you can print a sign in sheet if desired.

1. Select the print roster icon

The next step is to wait for users to attend the inservice, complete the questionnaire, and submit for approval.



Step 3 - Approving Users

Once users attend the inservice, complete the questionnaire, and submit for approval, you will need to approve submissions in order to submit Act 48 hours to PERMS. When users complete their questionnaire and submit for approval, you will receive email listing the users needing Approval.

Prior to approving each user, you may want to...

- Modify their Act 48 hours
- Review their completed questionnaire

	Expires Soon	2019-01-21 Reading	g Assessment						100		Actions	~
	Expired My Supervision Rems All Users' Progress Templates Add Rem	Act 48 hours. No action is r	equired. s for this item have been su	to submit previously earned cccessfully submitted to PERMS,	Person of Conta Approval Stages User Requireme Reminders:			Approver	O ed of User			
4 10 10 10	My Compliance Items User Management Group Management Questionnaire Management Reporting Portal Management	Resource Links - Documents - Roster Approve Reopen 1	Nudge	Message Remove F	Act 48: Hours: 1.5 Provider: Examp Activity Type: Ac Course Type: Te Course Sub Typ	t 48 Professio aching and Lo e: Teaching To	sarning Pr schniques	ofession and Stra	al Development		Add Users	÷
		0 000 f	Name Q,	Due Date Completed	et 48 - Al 🛛 🛛 🕈	History D	ridence	Notes				
© An NotSul	y Adams - Submission Status nited.		Adams, Amy	m 01/21/2019	1	э) 	ß	Actions	v	Approve	v.
7258141 Hours*	T	2	Baker, Ryan	01/21/2019	e.n (i)	3) =	Ø	Actions	v	Approve	Ψ.
Submittel		E									25	5 0

Modify individual users Act 48 hours (Optional)

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.

		2019-01-21 Curriculum Develop	ment							Published	Actions	
8	Questionnaire Management	be submitted to PERMS and you will receive an	email.			COULSE 30	и туре. сиптсия	atti pisasioh	THE R.			
e	Reporting	Resource Links	2									
Exa	mple School PD Form	×										
Comp	leted on 01/27/2019 of 3:49 PM											
the is	Estions structor was well prepared and organized + Strongly Agree Agree	, 2	Nudge	Message	Remove P	rint		Current Cyc	le 01/2	1/2019 - 01/21/2019 \$	Add Users	4
	Disagree][-			
	Strongly Disagree		Q,	Due Date	Completed Ad	t 48 - Al	History	Evidence	Notes			
:	formation presented was beneficial « Strongly Agree » Agree » Disagree			m 01/21/2019		© m	°,		h	Actions v	Approv	•
•	 Strongly Disagree comments and feedback 			m 01/21/2019		@ m	ຈ	$\stackrel{\sim}{=}$	Ø	Actions v		
adad Name	ff andjf ;alndj tJakodjf ;aldnjk tjaldnij			m 01/21/2019		© m	ອ	ì	æ	Actions v		
Amy Sign P	Adams					@ m	5	~	ß	Actions		
ALC: Y				01/21/2019		0.01	9		8			
	2 ho	n		m 01/21/2019		© m	ຈ	ì	Ø	Actions v		

Review completed questionnaires (Optional)

To review individual user's completed questionnaires, from the roster section of the item's details page...

1. Select the bold Questionnaire Icon next to a user who has completed the item

From the completed questionnaire pop-up...

- 1. Review the details submitted by the user
- 2. Close the pop-up

Note - A questionnaire usage report can also be generated for this item. Questionnaire usage reports summarize the responses of all users on one exportable spreadsheet. For directions on how to access and export the questionnaire usage report, see the directions at the end of this tutorial.

	2019-01-21 Curri	culum Developme	nt				Published	Actions v
Questionnaire Management	be submitted to PERMS a	nd you will receive an email		Course and ry	ре. сиптсики	i pereopinen	h	
Reporting	Resource Links							
Portal Management								
	Documents							
	Questionnaire Preview							
	Example School PD Form							
	Roster							
	Approve Reopen	Modify Due Date Nud	ige Message Ri	emove Print	Ci	urrent Cycle 0	1/21/2019 - 01/21/2019 \$	Add Users 土
	0 Pioly 8	Name Q	Due Date Com	pleted Act 48 - All 0	History	vidence Note	1	
	• •	Adams, Amy	m 01/21/2019	© m	5) D	Actions	Approve v
	· •	Baker, Ryan	m 01/21/2019	@ m	ອ) III D	Actions	
Action *				(m (i)	5		Actions	
Approved			\$ 21/2019	0.04	5			
Completed Date:		Г	1	@ m	5	° 0	Actions	
January 21, 2019		L	2 21/2019		5		Actions v	
		a 3	ancel 21/2019	(m)	ອ) 0	Actions	

Approving Users - Users can be approved individually <u>or</u> in bulk.

To approve an individual user and submit their hours to PERMS...

1. Select the green Approve button across from their name

From the Approval pop-up...

- 1. Change the date to the date of the inservice by selecting the Calendar icon
- 2. 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.

	Expires Soon	2019-01-21 Reading Asses	sment					F	ished.	Actions v
	0 Expired My Supervision Rems All Users' Progress Templates Add Rem	Instructions: <u>NO ACTION IS REQUIRED</u> . The purpo Act 48 hours. No action is required. Note - When the Act 48 hours for this it you will receive an email notification.			Person of Contac Approval Stages: User Requiremen Reminders:	,	dmin User act 48 Approv Jothing Requi			
6 9	My Compliance Items User Management Group Management Questionnaire Management	Resource Links - Documents			Act 48: Hours: 1.5 Provider: Exampl Activity Type: Act Course Type: Tea Course Sub Type:	48 Professiona ching and Lean	ning Professio	onal Developme	16	
	Reporting Portal Management	Roster 2 Approve Heopen Modify Due b 1 Previty T Name			rint 148-Al •		nt Cycle 01/2	21/2019 - 01/21/2	019‡	Add Users 🛓
		x 📵 Adams,	Amy 01/21/2	019	@ @	9	ß	Actions	Ý	Approve 🗸
Comp	n * oved Aeted Dute: aery 21, 2019		01/21/2 3 4 not	019	(2.1) ⁽³⁾	2	Ø	Actions	Ÿ	Approve v

To bulk approve users...

- 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

									Suppor		h in User hool Portal s Logout
I Menu	My s	Supervi	sion It	ems		Add item Select	Tag #	Active	• Sea	ch	Q
Supervision Management	Sk	atus 0 Co	mplete 0	Pending 8		Compliance Item Name 0		ct 48 0	Start Date 0	End Date 0	Actions
All Items My Supervision Items		0	1/18	0 Pending	Published	2019-01-21 Curriculum Development		Ø	01/21/2019	01/21/2019	View
Pending Verification Expires Soon	1	0	0/2	2 Pending	Published	2019-01-21 Math Assessment		0	01/21/2019	01/21/2019	View
47 Expired All Users' Progress		0	1/1	0 Pending	Published	2019-01-21 Problem Solving		0	01/21/2019	01/21/2019	View
Templates Add Item		0	2/2	0 Pending	Published	2019-01-21 Reading Assessment		Ø	01/21/2019	01/21/2019	View
My Compliance Items		0	12/12	0 Pending	(74010744)	Acceptable Use Policy			06/18/2017	11/23/2018	View
User Management		0	17/18	0 Pending	Published	Acknowledgment and/or Sign-Off Item			05/01/2018	09/30/2018	View
Group Management Questionnaire Management		0	1/25	0 Pending	Published	Act 114 Federal Criminal History Background Check Clearar (Revised)	nce		_	_	View
Reporting	1	0	2/5	1 Pending	Published	Act 151 PA Child Abuse Background Check Clearance			-		View
Portal Management		0	3/10	0 Pending	(70000700)	Act 34 PA Criminal History Background Check Example					View
		Θ	0/0	0 Pending	Published	Act 44 - Emergency Drills			01/01/2019	01/30/2019	View
		0	0/0	0 Pending	(70010744)	Act 44 - Emergency Plan Review			08/01/2019	08/31/2019	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 Logout
BY EDULINK Menu Supervision Management All tems 40 Pending Verification 7 Expires Soon 7 Expired My Supervision items All User' Progress Templates Add item Vy Compliance items User Management User Management Reporting Portal Management	2019-01-21 Curriculum Development Cycle Progress: Description: Act 48 item Instructions: Purpose - The purpose of this item is to track attendance at an upcoming in-service, gather feedback about the session, and submit Act 48 hours to PERMS. Step 1 - Please physically sign-in at the in-service. Step 2 - At the completion of the in-service, complete the questionnaire to provide feedback (click the blue Complete Questionnaire, be sure to click the green Submit for Approval button. Note - Once this compliance item is approved by the Act 48 Coordinator, your hours will be submitted to PERMS and you will receive an email. Resource Links - Documents	Compliance Cycle Type: Start Date: End Date: Recurrence: Person of Contact: Approval Stages: User Requirements: Reminders: 1 Day after the End Date Act 48: Hours: 1 Provider: Example School Activity Type: Act 48 Profess Course Type: Standards Are Course Sub Type: Curriculur	a Curriculum and Assessmen	Actions 2 Duplicate Delete Archive Questionnaire Usage Report
	Questionnaire Preview Example School PD Form			

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 items details (Title, Person of Contact, Dates, Approval Stage, and Act 48 details)
- Save, Publish, and Close.
- Add Users
- Print the sign in sheet (optional)
- Wait for users to attend the inservice, complete questionnaires, and submit for approval.
- Modify Act 48 hours for individual users, review completed questionnaires, and Approve.



Creating a Questionnaire Usage Report

A questionnaire usage report can be generated for this item. Questionnaire usage reports summarize the responses of all users on one exportable spreadsheet.

								Suppor	← Adm Example Sc Message	
III Menu	My Supe	ervision It	ems		Add Item Sel	lect Tag 0	Active	• Sear	ch	Q
Supervision Management	Status 0	Complete 0	Pending 8		Compliance Item Name 0		Act 48 0	Start Date 0	End Date 0	Actions
All Items My Supervision Items	•	1/18	0 Pending	Published	2019-01-21 Curriculum Development		Ø	01/21/2019	01/21/2019	View
Pending Verification Expires Soon		0/0	0 Pending	Draft	2019-01-21 Curriculum Development Copy			01/21/2019	01/21/2019	View
47 Expired All Users' Progress	· 0	0/2	2 Pending	Published	2019-01-21 Math Assessment		Ø	01/21/2019	01/21/2019	View
Templates Add Item	0	1/1	0 Pending	Published	2019-01-21 Problem Solving		ø	01/21/2019	01/21/2019	View
My Compliance Items	0	2/2	0 Pending	Published	2019-01-21 Reading Assessment		0	01/21/2019	01/21/2019	View
User Management	0	12/12	0 Pending	Published	Acceptable Use Policy			06/18/2017	11/23/2018	View
Group Management	0	17/18	0 Pending	Published	Acknowledgment and/or Sign-Off Item			09/01/2018	09/30/2018	View
Questionnaire Management Reporting	0	1/25	0 Pending	Published	Act 114 Federal Criminal History Background Check Clea (Revised)	arance		_	_	View
Portal Management	• •	2/5	1 Pending	Published	Act 151 PA Child Abuse Background Check Clearance					View
	0	3/10	0 Pending	Published	Act 34 PA Criminal History Background Check Example			-	-	View
		0/0	0 Pending	PARTINE	Act 44 - Emergency Drills			01/01/2019	01/30/2019	View

From the My Supervision Items page...

1. Select View next to the item you would like to create a report for

				Admin User Example School Portal Support Messages
III Menu	2019-01-21 Curriculum Development			Publiched Actions
 Supervision Management All tems Pending Verification Expired My Supervision Rems All Users' Progress Templans Add tem My Compliance Items User Management Group Management Questionnaire Management Reporting Portial Management 	Cycle Progress: Description: Act 48 item Instructions: Purpose - The purpose of this item is to track attendance at an upcoming in-service, gather feedback about the session, and submit Act 48 hours to PERMS. Step 1 - Please physically sign-in at the in-service. Step 2 - At the completion of the in-service, complete the questionnaire to provide feedback (click the blue Complete Questionnaire button). Step 3 - When finished with the Questionnaire, be sure to click the green Submit for Approval button. Note - Once this compliance item is approved by the Act 48 Coordinator, your hours will be submitted to PERMS and you will receive an email. Resource Links . Questionnaire Preview Example School PD Form	Compliance Cycle Type: Start Date: End Date: Recurrence: Person of Contact: Approval Stages: User Requirements: Reminders: 1 Day after the End Date Act 48: Hours: 1 Provider: Example School Activity Type: Act 48 Professi Course Type: Standards Area Course Sub Type: Curriculum	a Curriculum and Assessmen	Edit Duplicate Delete Archive Questionnaire Usage Report 2
	Dester			

From the Item Details page...

- 1. Select Actions
- 2. Select Questionnaire Usage Report from the drop down menu

Follow the on screen directions for downloading the file. Note - The file will contain all the responses from completed questionnaires for this item.