Best Practice – PIAA Mandatory Coaching Courses – Fundamentals of Coaching and First Aid (Richland 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 – PIAA Mandatory Coaching Courses – Fundamentals of Coaching and First Aid (Richland 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 Completed Questionnaire and Upload Evidence/Attachment)
    h. Reminders – edit as needed
    i. Questionnaire – editing questionnaire will occur in step 7
    j. Resources – edit as needed / add training links and/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 – edit hours and details as needed. Hours earned will be determined by training course selected.
6) Save, Publish, and Close the item
7) From Questionnaire Management → Templates
    a. Locate the Template titled, PIAA Coaching Acknowledgement → Actions → Edit
    b. From the Edit Questionnaire page, customize the form…
        - Title – edit title as needed and be sure to remove template copy
        - Questions – edit questions and add questions as needed
        - When finished Save → Close
8) Locate and return to your item from Supervision Management → All Items page → View

9) How to assign users to the item (choose one of the following)…

   a. Add users manually (individually or as a group)
      1. From the Roster section of the Item Details page…
      2. Select the blue Add Users button
      3. Type the name of the user in the search bar
      4. Select Search
      5. Select user in the results column → Check that the user has been moved to the roster preview → then select Save Roster

         Note – Users will be added to the item, but will not have a due date.

      6. To enter a Due Date…
      7. From the Roster section, select the checkbox next to the user you just added
      8. Select Modify Due Date → Select the Calendar Icon to change the due date
      9. Select Save & Close

   b. Bulk upload users via a spreadsheet
      1. Construct a CSV file of users and their due dates
         - First column - email address of user
         - Second column - leave this column blank
         - Third column – due date for individual user (MM-DD-YYYY)
         - Note - Ensure that your CSV file has three columns (as indicated above). Do not include headers. Save as CSV file.
      2. From the Roster section, click the blue "Upload Users" icon
      3. Select Choose File
      4. Once you have selected the CSV file, select the green Upload File/ Add Users button
      5. Select the white Close button to exit

         Note – You will receive an email with a summary of your upload. From the email you receive check the processing details to ensure that all users were added successfully.

   c. Note - Once users are assigned to the item, 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.