Best Practice – Continuing Professional Education Status (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 – Continuing Professional Education Status (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 Completed Questionnaire)
    h. Reminders – edit as needed
    i. Questionnaire – editing questionnaire will occur in step 7
    j. Resources – edit as needed / add links and/or documents as needed
    k. Recurrence – leave as is / Recur every (5) year(s). Recurrence does not end
    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 Questionnaire Management → Templates
    a. Locate the Template titled, Completion of Continuing Education Requirements Reviewed → 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) From the Roster section, bulk upload a list of users and their due dates.
    a. Create a CSV file with three columns.
        - First column should be the email address of the user
        - Second column should be left blank/empty
        - 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 User 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 Admin user will also 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.

10) Important Note – When Approving Users "Use the original due date xx/xx/xxxx as the start date for the next cycle."

