Schoolnet

Educator Development: PD Planner User Guide

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This edition applies to Release 15.3 of the Schoolnet software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

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Preface

Use this guide to assist you while navigating Schoolnet. This guide is based on the Schoolnet online help, which you can also use to learn the Schoolnet Student Information System (SIS) and to serve as a reference.

The Schoolnet online help is updated as Schoolnet is updated. Not all versions of the Schoolnet online help are available in a printable guide. For the most up-to-date information, click Help on any page in Schoolnet.

Referenced Sections

This guide is based on the Schoolnet online help, and may include references to sections that are not contained within the guide. See the Schoolnet online help for the referenced section.

Security Permissions

Depending on your security permissions, only certain procedures may be available to you.

Navigation

This guide uses the > symbol to move down a menu path. If instructed to "Click File > New > Window," begin by clicking File on the menu bar. Then, click New and then Window. The option noted after the > symbol will always be on the menu that results from your previous selection.

1: Get Started

Educator Development is a web-based Professional Development Management System. It supports easy record-keeping, tracking, and reporting of the many components of professional development programs and educator evaluations. This system supports individuals, mentors, observers, school administrators, district administrators, and activity facilitators.

Educator Development consists of two parts: PD Planner, which helps manage PD course offerings, register for resources and attend activities, and award credit and recertification, and general Educator Development, which consists of multiple educator evaluations that score on educator effectiveness such as classroom Observations, Professionalism reviews, Professional Growth Plans, and others. Your site may have one or both parts of EDS. The following guide outlines the PD Planner tasks.

Educator Development Dashboard Overview

Your Educator Development Dashboard displays a list of shortcuts to tasks most immediately relevant to you based on your role. You can access it by clicking Educator Development in the top navigation bar of most pages in the system. From here you may access the following, depending on your role and product configuration:

- Welcome

  A section for users that have access to PD Search and PD Profile exclusively (mainly Staff users). This displays a welcome message and links to the PD Search and PD Profile pages.

- Recommended to Me

  Activities and resources that other educators, observers, and leadership have suggested to you using the “Recommend” feature. Hover over the resource name to view information about it or go to it via URL, video, or download. Click the icon beside the activity name to view the recommender's rationale and View All to go to a full list of your recommendations. See Recommending Activities and Resources.

- PD Search

  Search for activities and resources by all, keyword, ID, or calendar.

- Tools & Reports

  Lists the many tools and reports found in Educator Development. Depending on your role and permissions, some of these could include PD Profile, Professional Growth Plan, Observations, Student Perception Survey Results, External Links (links outside of the system), and more.

- Rate Recent Activities

  Lists activities you have completed that you have not yet rated.

- My Upcoming Activities

Lists all activities for which you have registered. You can add these activities to your calendar through the link under the web part.

- Upcoming Activities At My School

  Lists all the upcoming activities at your school.

- Upcoming Activities to Facilitate

  Visible only for facilitators. You can add these activities to your calendar through the link under the web part.

- Forms to be Completed

  Lists all forms you have not yet completed.

- Alerts

  Lists all items at your institutions that require approval.

- Initiative Progress

  Available for permissioned users, this lists up to five initiative progress statuses by displaying a count of participants that have Not Started, In Progress, and Completed the required PD items per initiative. A link to the initiative is available under the Name column, and the total number and end date for the closest upcoming item is also displayed on this web part. A hover over is available beside each category, describing what classifies a PD item as Not Started, In Progress, and Completed. Initiatives are flagged in red when the end date is within 30 days of the current date. Click View All to go to the Manage Initiatives page.

- PD Planner reports

  Usually only configured to be visible to administrators and leadership, these are graphic representations of PD Attendance by Month, Current Year PD Activities by Type, and Highest Attended Activities, Highest Rated Activities, and Highest Rated Facilitators.

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PD Search

PD Search is a search tool used for finding professional development activities offered by your school, district, or state. It is accessible from the home page, Educator Development Dashboard, and on its own landing page in Educator Development.

To find PD, click the Search button or browse by content area, grade, calendar, item type, or standard. If any PD has been recommended to you, you will also be able to find it in the various areas PD Search is found.

About PD Search Results

PD Search is a search tool used to locate PD activities and resources. These are indexed by various measures, so you can enter "classrooms management", for example, and the system will locate all matches within the title, description, standard, initiative, content area, source, and other filters containing the words together or separately.

To search for activities and resources

1. Hover over the **Educator Development** header and click **PD Search**.
2. Use the filters to refine your search,use the links to browse by calendar or item type, or use the checkboxes beside standards and click **Go** or the **Search** button.

You are now viewing a list of activities and resources based on the chosen criteria. From here you can change your search, refine results further using filters, and find out more information about your results.

About Filters

Use the filters to the left of your results to refine results further. All filters can be expanded and collapsed, and will appear as a ribbon in PD Search results when at least one criterion is specified. Use the ribbon to remove filters, or hover to expand them further if multiple selections of a filter are grouped together.

- **Date/Relevance/Rating**: Use the top right drop-down to sort results by one of these three options.
- **Type**: Distinguishes whether PD is an activity or resource. Activities can be attended, either in-person or online, and can also have open and closed sections, which determine whether they are available for enrollment or not. Administrators also have access to archived activities. **Resources** are always available to be viewed and used by educators (for example videos and podcasts).
- **Content Area**: Filters resources based on the district settings for content areas. For example, your district may have content areas assigned to Mathematics, Science, and Language Arts.
- **Grade**: Filters resources based on grade level.
- **Standard** (the label may be different on your site): Filters results by PD items that are aligned with standards in a teaching framework. Hover over the standard to view its' description.

- **Initiatives**: Choose Initiatives that the activities and resources are associated with by clicking the **Select Initiatives** link.
- **Date**: Limit results to activities that have sections scheduled between the two dates you select (including activities on those two dates). To search for a single day, enter the same date in the **From** and **To** fields. Both the From and To fields need selection before this filter applies.
- **Institution**: Limit results to activities that are created by someone at the school, region, or district you select. (Note that this may be different from the location of the activities' sections.)
- **Location**: Limit results to activities that have sections scheduled at the specified location. You can select a location one of two ways: if you know the name of the location in the system, you can use the type-ahead feature to select it; otherwise, you may browse for the location in the drop-down list. (Note that this location may be different from the institution where the activity was created.)
- **Job Category**: Defaults to Any Job Category. If you would like to narrow your results further to include only job categories that you belong to, select Only my Job Category. To view your job categories, go to **Educator Development > My PD Profile**.

About List-based Results

The following are elements of PD Search results:

- **Title**. Click the title to open the activity or resource. Activity titles will bring you to the Activity Details page, where you can register for the activity or view additional information. Resource titles will open the resource directly. Resources (links, PDFs, videos, etc) will have an icon before their title to represent the format of that resource.
- **Registration Status**: If you've registered or requested to register for an activity, your status will display in the top right corner of search results. Your approval status or waitlist ranking will also appear under Show # Section(s).
- **Description**. If the full description is too long to be displayed, click [more] to view the rest.
- **Rating**. The rating, based on people who have taken and rated the resource, along with the number of respondents.
- **Activity ID** (Activities only). The unique numbered ID of the activity in the system.
- **Grade**. The grade range the activity or resource is applicable to.
- **Details** link (Resources only). Click **Details** to view the Resource Details page. This page displays the resource's category, URL if applicable, title, description, standard(s), grade(s), and content area(s), and allows you to rate the resource.
- **Edit** link (for PD Administrators and Resources only). Click Edit to review and alter components of the resource.
- **Content Areas and Credit Types** (Activities only). The content areas and credit types an activity is aligned to. If the activity is aligned to more than one of either, Multiple Content Areas or Credit Types will be displayed.
- **Activity or Resource Types**. The category (for instance in-person, online, video) of the activity or resource.

- **Standard ID**. If the activity or resource is aligned to any standard, click this drop-down to view the standard(s), along with their description.
- **Show [#] Sections**. (Activities only.) Displays the number of available sections for the activity. Click this link to expand a list of all upcoming sections, showing the section name, date, and location. Clicking the section name link will bring you to the Section Details page, where you can register for the section or view additional information.
- **Publisher**. (Resources only). Displays the source of the resource.

Additionally, activities and resources found through the keyword search include a box containing the associated standard.

About Calendar-based Results

To see calendar-based results, go to PD Search and use the Browse by: **Calendar** link.

This view presents search results on a monthly calendar. Only in-person and archived activities are scheduled and appear in the calendar view. Activities are listed on a calendar day when you are registered for or have permission to view (it is at your school or district) the activity's section.

The calendar entry includes the activity start time and the name of the activity. Clicking the **calendar entry** will bring you to the **Activity Details** page, where you can register for the activity and view additional available sections.

You can search by year and month in the calendar view by clicking on the year or month and typing your query. You may also view past activities in this view.

If there are more than three activities scheduled on a particular day, click **+more** to view a list of search results scheduled on that day.

Locate and View Activity Documents

Some activities can have extra documents attached for your use and reference.

To locate these documents:

1. Locate an activity using PD Search.
2. Click the **activity name** to view the Activity Details page.
3. Scroll down to **Activity Documents**. Any documents that have been attached will appear here. Click the blue title links to download the attached files.

Activity Details Page

The Activity Details page may be accessed from various locations in Educator Development and other areas in the system. It is the landing page for interacting and gathering information about an activity. Various actions can be performed, depending on your permissions for working with the activity and/or eligibility to register for it.

Actions for activity participants:

- **Register**. If you meet all eligibility criteria for an activity, such as prerequisites and job role, you will have a Register button. You may also have **Add Me To Waitlist** or **Request for Registration** buttons, if waitlists or requests are enabled. You can also cancel your registration later from this Activity Details page.

- **Recommend**. With the proper operation, you may recommend an activity to specific users or all users at an institution. See Recommend Activities and Resources for more information.

Actions for activity administrators:

- **Edit Activity**. Edit several aspects of an activity, such as eligibility criteria, contact information, and fees. See Create and Edit Activities for a full list of settings that can be edited.
- **Schedule Section**. Schedule and manage sections by providing a section name, location, website, attendee information, and other related details. See Schedule Sections for more information.
- **Manage Expenses**. Add expenses to an activity. See Add Activity and Section Expenses for more information.
- **Manage Forms**. Associate new forms and/or run reports. SeeAssociate Forms with an Activity Associate Forms with an Activity for more information.
- **Archive Activity**. Click to archive the activity so participants can no longer register for it and it will be removed from PD Search results.
- **Delete Activity**. Delete the activity (you will be prompted to give a reason for deleting the activity before it is finalized). See Edit or Delete an Activity for more information.

Section Details

Every in-person activity in Educator Development has at least one section associated with it. Participants register in or are registered for sections, and can view various section details such as location, date, and their enrollment status on a Section Details page. Individuals facilitating the activity can also register attendees, assign credit, and do various additional tasks here. The following is a list of tasks that can be done on this page (some may or may not be available to you, based on your operations):

For participants:

Register for an Activity

Recommend Activities and Resources

Get Added or Removed to the Activity Waitlist

Cancel Activity Registration

For PD administrators:

Register for an Activity

Add Walk-In Attendees

Register Participants from Waitlists

View Canceled Registrations

Forms and Expenses

Track Submission of Required Forms

Assign Final and Partial Credit

Edit Details of a Section

Track Session Attendance

Note:
You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

Register for Activities

Educator Development allows users to register for activities for professional development, to obtain credit, and has various rules for registering such as eligibility and approval requests.

Register for an Activity

For participants

When registering for an activity, it's important to note that the system does not allow you to register for two activities going on at the same time. However, you may request registration to this activity by simply clicking **Request Registration** to submit your enrollment request to your facilitator.

You may also cancel your registration for the first activity by going to the Activity Details of the registered activity and clicking the **Unregister** button next to the registered section of that activity. For more details on any of these fields, consult Activity Information Options in Creating Activities.

1. Locate an activity using PD Search.
2. Click the **activity name** of the desired activity. The Activity Details page appears. This page has the following sections:
   - **Eligibility Status**: A message displays showing whether you are eligible to register for an activity. If you are not eligible, you can click **Show Requirements**, which will list criteria that must be met to register. You will also see exactly which requirements you will need to meet to register.
   - **Scheduled Sections**: Details about sections of an activity including facilitator, number of spaces available, location, date, status, and waitlist. You can click the **section name** to view additional details about the section and **Recommend** to recommend the activity if you have taken it previously. You can also select type of credit if the activity offers more than one type.
   - **Activity Details**: Includes basic information, registration and scheduling details, and certification details.
3. Register for the activity. There are several variations that may be visible depending on the type of activity or the registration status of the activity's section:

   - If you meet all of the activity's eligibility requirements, the **Register** button will display. If multiple credit types are available, select a type of credit before clicking Register.
   - For online activities, the **Request Access for Online Course** button will display.
   - For full sections and those with a registration period that has ended, a **Request for Registration** button may appear. (Late registration or waitlisting must be enabled for the activity). Clicking this will set your registration status to "Pending Approval." An administrator can choose to approve your request in advance or the facilitator of

the event may choose to mark you as attended; either action will effectively register you for the activity.

- If none of the above buttons are visible, then you may not meet the eligibility requirements, you may not have completed the required prerequisites, the section may have already occurred, or the section may be full (without waitlisting or late registration enabled).

Note: Alternatively, you can register for an activity related to initiatives or PD Goals through the Initiatives and PD Goals sections in your individual PD Profile. You may also register for a section through the Section Details page. To view the Section Details page, click on the **section** name. The Section Details page appears. Click the **Register** button at the bottom of the page.

4. A confirmation of your registration is sent to your external calendar and activity updates will automatically be sent. The activity will also display in the Activities page of your PD Plan with the status "Registered."
5. Once you have registered for an activity, the Scheduled Sections area of the Activity Details page displays a **Cancel my Registration**button next to the registered section. No other buttons will appear.

For administrators

Permissioned users can register other users into a PD activity. Users who can look up and register other users for activities must be:

- Given the *Schedule and manage activity sections* operation. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.
- Assigned to the school for school-based activities.
- Assigned to any district in the state to register users from different districts for statewide activities.
- Assigned to the state or top district in a state or multi-district solution for state-only activities.

To register users for activities:

1. Hover over the **Educator Development** header and click **PD Search**.
2. Use the criteria provided to search for the activity and click **Search**, or click **Search** without entering any terms to see all listings.
3. Click **View Section** and then click **Track Attendance** to go to the Section Details page.
4. Click **Track Attendance** in the Scheduling Details section.
5. From the session attendance listing, click **Register Attendees**.
6. Enter search criteria for attendees and click **Go**. There may also be a number of attendees on the list who have scheduling conflicts. A scheduling conflict happens when the attendee is already registered for a section that occurs at the same time on the same date.

Note: For activities that are not school-based, this list will include individuals who meet prerequisite and eligibility requirements for the activity. For school-based activities, this list will include users who meet the eligibility requirements and prerequisite requirements excluding Institution.

7. Attendees with scheduling conflicts will appear in red in the search results list. To view a list of all users with conflicts, click **Attendees with scheduling conflicts** at the top of the search results.
    a. To register a specific user with a conflict or multiple users with a conflict, click **Register Selected Attendees**. When complete you will get directed back to the All Attendees page.
    b. To register all attendees click **Register All Attendees**.
    c. To register all users who do not have scheduling conflicts click **Register Attendees without Conflicts**.
    d. To register a specific attendee or a group of attendees, check the boxes next to the name of the attendees and click **Register Selected Attendees**.

Note: If an individual tries to register for a second activity that occurs at the same time as one they have already scheduled, the system will notify the individual of the conflict and may not allow registration for the activity (double-booking must be enabled to allow this). If double-booking is not enabled, a participant can cancel registration for the first activity by going to the activity through PD Search, Calendar, or wherever else they have it saved and clicking Cancel Registration.

Note: Attendees with conflicts who are registered will be withdrawn from their conflicting activities and will receive an email notification stating they are no longer enrolled in that section and have been enrolled in the new section.

Facilitators who can look up and register other users for activities must be:

- Assigned to the school for school-based activities.
- Assigned to the state or top district in Schoolnet's state or multi-district solution for state-only activities.
- See Administer and Facilitate Statewide Activities for information on statewide activities.

Cancel Activity Registration

The steps:

1. Hover over the **Educator Development** header and click **PD Search**.
2. Find the activity using keywords or click Search without entering any terms to see a list of all activities. Click a **section name** or an **activity name**.
3. On the section or activity details page, click **Cancel My Registration**.

4. Enter a reason for cancellation and click **Delete**. This reason will be available to the person facilitating the section and to administrators.

Get Added or Removed to the Activity Waitlist

The system automatically generates a waitlist for full activities. Individuals wanting to register for an activity that is already full can be added to a waitlist. If a registered individual cancels a registration, the next individual on the waitlist will automatically be registered.

System Operators can also add individuals to the waitlist or register individuals from the waitlist by following these steps:

1. Locate an activity using PD Search.
2. Click the **activity name** for more information. See Register for an Activity for specific information on activity and section.
3. If the section is full, click **Add Me To Waitlist** to get added to the waitlist.

   If the section is full and the Add Me To Waitlist button does not appear, it is possible you do not meet the eligibility criteria or the section close registration date has passed.

4. Alternatively, the **Add Me to Waitlist** button will appear at the bottom of the Section details page.

   You cannot be registered from a waitlist while waiting for pre-registration approval for an activity. Your approval must be submitted before you can be registered from the waitlist.

5. To remove yourself from the Activity's Waitlist, you may click the **Remove Me From Waitlist** button next to the section name in the Scheduled Sections area of the Activity details page or at the bottom of the Section details page.

Note: Individuals or administrators can cancel activity registrations for an activity.

Edit and Delete Activity Requests

An individual not approved for an activity can edit a request to provide additional information for consideration and re-submit it. If an activity requires pre-registration approval, you will only be able to edit submitted requests after they have been reviewed. You can edit or delete requests for externally submitted activity requests at any time.

1. Hover over the **Educator Development** header and click **My PD Profile**.
2. Click **Activities**.
3. Click the **Request** link for the desired activity.
4. Use the **Edit** or **Delete** button to edit or delete the request.

Register Participants from Waitlists

When an activity is created or edited, a waitlist can be enabled so that when the maximum number of participants for an activity has been reached, facilitators can add additional participants from the waitlist into the activity.

1. Hover over Educator Development and click **My PD Profile**.
2. Select the **Facilitating Activities** tab.
3. Click the name of the activity you are registering participants for.
4. Select **Manage Waitlist** from the drop-down. This link will only exist if there is a waitlist.
5. Optional: If you want to add a participant to the waitlist, click **Add Individual to Waitlist** and select an individual to add.
6. Click the radio button next to a name of a participant on a waitlist and select **Register individual from waitlist** from the drop-down to register them for the activity.

Pre-registration Approval

When administrators create an activity, they can determine if it requires pre-registration approval, which limits registration to specific individuals. School and/or district administrators approve requests, depending on Educator Development Settings.

Attendees interested in an activity requiring pre-registration approval will submit a request to attend which will be approved by the school and/or district administrators. Registered attendees with pre-registration approval must complete a reflection to receive activity credit.

When you create an activity, click **yes** next to Approval Required for Registration under Registration and Scheduling.

This will require that individuals submit requests for an activity in order to register for it. You can also track expenses associated with the activity per individual by entering the dollar amount in the fields provided.

Note: The “# registered” count will not change for an activity requiring pre-approval until selected users are approved. Until then, their status remains “Pending approval.” Once approved, the selected users will be “registered” as long as there are openings in the activity. If the activity is full when approval is submitted, the users will be added to the waitlist.

Work with Pre-Registration Approval

For certain activities, you may have to complete an activity request to attend the activity. These activities display a message at the top of the Scheduled Sections area of the Activity Details screen indicating that pre-registration approval is required.

To complete an activity request:

1. Locate an activity using the PD Search.
2. Click on the **activity name**. For more information related to the functionality of the activity and section, see Register for an Activity .
3. When you click **Register** next to the section you wish to register for, you will be prompted to fill out a Registration Request form.
4. When your school and/or district administrator reviews your request, you will receive an email notification of the administrator's decision. If the request is approved, you will become registered for the activity.

Review Approval Requests

An activity can have an approval requests enabled, which requires a PD administrator or facilitator to approve various user requests related to the activity. Users with the *Approve registration and credit requests* operation can see a list of approval requests submitted by individuals in their school, district, and state, as well as well as in other districts in their state for statewide activities.

Note: You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

The types of approval requests:

- *Double booking*: Users who have a conflict with another section of an activity going on at the same time need approval to register in both activities. This type of request is automatically added to this list, even if the activity does not require an approval request. This also requires a configuration in PD Settings, "Manage Attendee Scheduling Conflicts" to be set to Allow. Also, while *attendance* in any session can be entered for a double-booked participant regardless of whether that request has been approved, *final credit* cannot be awarded to any participant of a double-booked activity until the double-booking has been approved by that section's facilitator or a PD administrator on the Review Approval Requests page.
- *Preapproval activity registration request*: Also determined by a configuration in PD Settings, "When an individual submits an activity request", this determines what type of users must approve activity requests. School, district, or school and district PD administrators can be the ones approving requests. There is also an option to auto-approve requests, which means they will not appear on Review Approval Requests at all. Activity approval requests still have to be enabled when creating activities.
- *Complete reflection*: Users who are registered or have completed activities, but have forms outstanding, require facilitator approval. Facilitators approve or reject requests from this page, but manage forms through the activity details page. See Forms and Expenses for more information on forms.
- *Request recertification credit for internal activity*: In rare cases such as editing preapproval requests or changing activity names, activities will be listed as pending approval ion this page

and will require a recertification credit request to be edited. Click on the activity name to go to the Recertification Credit Request page.

The steps:

1. Click the **Educator Development** header.
2. Click **Review Approval Requests** under Tools & Reports.
3. Select search criteria for the approval requests and click **Go**.

   Approved and Not Approved requests can no longer be approved or rejected. *Pending Facilitator Approval* means activities require approval by the specific facilitator assigned to the section, and *Pending Approval* means anyone with the *Approve registration and credit requests* operation can approve the request.

4. To accept or reject approval requests, select **Yes** or **No** in the Approved? column.
5. Optional: Add a comment to the approval request. This will be emailed to the submitter.
6. Click **Submit Requests Approval** at the bottom of the page.

Allow Late Registration

In certain scenarios, administrators may want to permit users to request to be registered for an activity after the registration period has ended. Late registration allows this to happen.

To enable late registration:

1. Create an activity or locate the activity through PD Search.
2. Set Allow Late Registration to **Yes** while editing the activity.
3. Click **Save**.

> **Note:** If late registration is enabled for an activity, participants can register before the last session has passed, even after the registration end date.

View Canceled Registrations

When an individual cancels registration for a section of an activity, they are prompted to provide a reason for the cancellation. Administrators may also view cancellation reasons for all sections.

To view the reasons for canceled registrations for a section you are facilitating:

1. Locate the activity using **PD Search**.
2. Click the **section name** for the section you are facilitating.
3. Select **View Canceled Registrations** from the drop-down.

Delete Registered Attendees

Facilitators can clean up registration rosters for activities in the system through the Track Attendance page.

To delete registered attendees:

1. Hover over the **Educator Development** header and click **PD Search**.
2. Use the criteria provided to search for the activity and click **Search**, or click **Search** without entering any terms to see all listings.
3. Click **View Section** and then click **Track Attendance** to go to the section Details page.
4. Click **Track Attendance** in the Scheduling Details section.
5. Select checkboxes next to the names of attendees you would like to delete.
6. Scroll to the bottom of this listing and click **Delete**.

Rate and Recommend

The following topics cover how to rate and recommend activities and resources in Educator Development for other users to view in various "Recommending for Me" sections of the site.

Recommend Activities and Resources

All users with the *Recommend Activity and Resource* operation have the ability to recommend PD to users in their own institution. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations. Recommended activities and resources appear on the Recommended for Me sections around the system and a list of all recommended PD in My PD Profile. For Observations, all observers can recommend while conducting Observations regardless of operation. Activities are recommended based on sections in the activity.

To recommend an activity

1. Locate the activity through PD Search.
2. Click the **activity name**.
3. Click **Recommend**.
4. Recommend the activity to a specific individual by entering their name or employee ID, or to multiple individuals at an institution by selecting an institution and clicking checkboxes beside the names you are recommending to.

To recommend an activity based on sections

1. Locate the activity through PD Search.
2. Click **View # Section(s)**.

   An activity has to have open sections in order to be recommendable. If a section is closed, it will say so in the section details on PD Search. If a section is open, it will say the number of spaces left or Waitlist Only in the section.

3. Click the desired **section name**.
4. Click **Recommend**.
5. Fill in the form and click **Go**.

To recommend a resource

1. Locate the resource through PD Search.
2. Click **Details**.
3. Click **Recommend**.
4. Fill in the form and click **Go**.

Rate Activities and Resources

Once you have taken an activity, you have the opportunity to assign it a rating from one to five stars. Resources can be rated at any time, but you should only rate resources you have actually used.

Average ratings are displayed in search results to help other users decide whether to make use of the activity or resource.

To rate an activity:

1. Click the **Educator Development** header.
2. If you have completed any activities, they appear in the Rate Recent Activities section of your dashboard. Locate the activity you are ready to rate here.

   Activities remain on this page until they rated.

3. Click on the empty star that corresponds to the rating you wish to give (1 to 5, counting from left to right).
4. The activity has now been rated. The page will refresh with your rating displayed as gold stars..

To rate a resource:

1. Locate a resource using PD Search.
2. Click **Details.**
3. Hover over the rating on this page and click on the empty star that corresponds to the rating you wish to give the resource (1 to 5, counting from left to right).
4. The resource has now been rated.

Activity Proposals

Educator Development makes it possible for permissioned users to submit an activity proposal in order for an activity to be possibly be added to the system. PD administrators must accept activity proposals before they may be added to PD Search.

Create Activity Proposals

Permissioned users in the system can create and submit an activity proposal to offer an activity in the catalog. If approved, the activity is available in PD Search for users permissioned to use them. Activity proposal submitters can also request additional sections of approved activities. Approvers and submitters will receive email notifications about the status of proposals.

To create an Activity Proposal:

1. Click the **Educator Development** header.
2. In Tools & Reports, click **Activity Proposals** > **Create**.
3. Fill in the form and click **Submit for Review**. The appropriate reviewers will be notified of the proposal, and it will be accessible to the submitter from the My Activity Proposals page.

Review My Activity Proposals

Once submitted, an activity proposal is accessible to the submitter to review and edit. Users with the Review Activity Proposals operation can also review others' activity proposals. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

1. Click the **Educator Development** header.
2. Click **Activity Proposals** > **Manage** under Tools & Reports.
3. Click a proposal's **Activity Title** to view its details.

View Activity Proposal Details

From the Activity Proposal Details page, use the drop-down menu to perform any of the following tasks:

- **Edit/Resubmit Proposal**: select this option and click **Go**. The Edit Proposal page appears, where you can enter your changes and submit your edits.
- **View Comments**: select this option and click **Go**. The Reviewer Comments page appears, where you can view related commentary and approval information.
- **Complete Review Form**: select this option and click **Go**. The Review Form page appears, where you are prompted to make entries.

Edit and Resubmit Activity Proposals

Only a proposal submitter can Edit/Resubmit an activity proposal or submit a draft version of a proposal. The edited proposal will re-enter the proposal approval queue to go through the approval process anew.

The steps:

1. Click the **Educator Development** header.
2. Click **Activity Proposals** > **Manage** under Tools & Reports.
3. Click the appropriate **activity title** in the My Activity Proposals listing.
4. To edit/resubmit the proposal, click the **Edit/Resubmit Proposal** option located in the drop-down menu.
5. If you are editing a Draft version, click on the **Submit for Review** button at the bottom of the screen the same way you would when submitting a new Activity Proposal.

Note: Once an activity proposal has been approved, users can add and edit sections to the activity through PD Search. See Schedule Sections for more information.

View Approver Comments on Proposals

Permissioned users can view reviewer comments on an activity proposal. Reviewers can only see their own comments/decisions and not the comments/decisions of other approvers.

1. Click the **Educator Development** header.
2. Click **Activity Proposals** > **Manage** under Tools & Reports.
3. Click the **Activity Title** in the My Activity Proposals listing.
4. Select **View Comments** in the drop-down menu and click **Go**.

Review and Approve Activity Proposals

An activity proposal may require approval by departmental admin(s), a system operator, or both. Reviewers will only have access to the proposals that they are responsible for approving. Users who have the *Review Activity Proposals* operation, and have the right department and content areas assigned in PD Profile > Reviewer Settings can search for and review others' Activity Proposals. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

To approve activity proposals:

1. Click the **Educator Development** header.
2. Click **Activity Proposals** > **Review** under Tools & Reports.
3. Make selections from one or more of the drop-down menus and click **Go**. To receive all results click **Go** without selecting any options from the drop-down menus.
4. Click any proposal's **Title** to go to its corresponding details page.
5. In the Review section at the bottom, select your approval decision and add any comments that

you would like the submitter to see.

6. Click **Save**.

Schedule Activities

PD activities can be scheduled by anyone with the *Schedule and manage activity sections* operation. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations. Once an activity proposal gets approved, sessions can be added to the sections of the proposal, or new sections may be made.

Difference Between Section and Session

When administering or taking activities, users should be aware of two concepts: section and session. A *section* must be created in order for an activity to appear PD Search. A section might have multiple *sessions* with multiple dates and locations. See Scheduling Sections for more information.

Schedule Sections

After you have entered the activity information, you must schedule a section of the activity for it to appear in the Activity Catalog and for users to be able to register for it. Also see Create and Edit Activities for details on automatically scheduling Sections for school-based activities. All scheduling and registration occurs at the section level of an activity.

To schedule an activity section:

1. Locate the Activity Details page using PD Search.
2. Select **Schedule a Section** from the drop-down.
3. Enter information for these fields, including: **Section Name, Location** and all information related to **Information and Scheduling**. You may click the **Scheduling Shortcuts** link in the corner of the Scheduling Details section to edit recurring sessions.

   If your Section has multiple sessions, you can pick the start and end time of the sections individually. It is mandatory to set an end date for the recurring section, and the number of sessions has to be a positive numerical amount. You can skip or reschedule sessions in a recurring section (for a holiday, for example) by manually changing this date on this page.

   You can change your session location at a later time, or for individual sessions, by navigating back to this page and clicking the **change** button under Scheduling Details. Also see Change Session Location. .

4. Click **Save** to publish the Section. It will be available for registration between the dates selected in the **Open registration on** and **Close registration on** fields.
5. You will see a Confirmation screen, which prompts you to move to the next activity. Select one of the following: **Register Attendees, Schedule another Section, Go to Activity Catalog, or Recommend.** Click **Go.**

Edit Details of a Section

You can edit details of a section including who the facilitator is, the location, URL, and other details from the Edit Section page.

The steps:

1. Click the **Educator Development** header.
2. Click **Activities** > **Manage** under Tools & Reports. Use the criteria provided to search for the activity and click **Go**.
3. On the resulting list, click the activity name to view its **Activity Details**.
4. Click the **name** of the desired section under Scheduled Sections.
5. Enter information about the section such as its name, location, and facilitator information.
6. To edit, select **Edit Section** from the drop-down. To delete, select **Delete Section** from the drop-down. If you are deleting a section, you must enter a reason which will be shared with any attendees who were already enrolled in the section. Click **Delete** when you are finished.

   Note: Only users with the operation **Delete activity or section with data** will be able to delete an activity or section for which attendance or credits have been submitted. Contact your System Operator to request this operation.

Change Session Location

Once you have scheduled sessions, you can return to the Activity Details page and change locations for these sessions.

To change session location:

1. Locate the Activity Details page using PD Search.
2. Select **Schedule a Section** from the **Select Action** drop-down.
3. Enter a new location for the session or select one from the drop-down.
4. Click one of the **Save** options at the bottom of the Schedule Section page to submit your change.

Note: Once you submit a session location change, an email notification will be sent to you with information about all the sessions in that section.

Resolve Scheduling Location Conflicts

Districts will choose whether or not they want to allow multiple sessions to take place at the same location at the same time (consult the *Educator Development: PD Planner System Operator Guide* for more information).

- If your district has chosen to not allow you to schedule a session at a location where a session is already scheduled for your chosen time, an error message will appear. You will then be able to

"Remove the Location" and select another. Or you can change dates and times of the conflicting sessions.

- If your district has chosen to allow you to schedule a session at a location where a session is already scheduled for your chosen time, a warning message will appear. You will be allowed to schedule the session, or you may choose to remove the location and/or change the dates and time of the conflicting sessions.
- When scheduling an activity, the form option "Select Location" displays the list of locations currently saved in the system. If you do not see a location that you want to select, click the **Cancel** button to return to the Schedule Activity form, and type in the location information.

Note: System Operators can add activity locations to the system for other users to choose from.

View Canceled Sections

As an administrator, you may wish to view which sections have been canceled and why.

To view canceled sections and their reasons:

1. Click the **Educator Development** header.
2. Click **View Cancelled Selections** under Tools & Reports.
3. You can see why a user canceled the section in the **Reason** column.

Repost Activities

1. Locate the corresponding **Activity Details** page through PD Search.
2. Select **Schedule a Section** from the drop-down.
3. Complete the section information and click **Submit** to post the activity. This posts the new offering without changing any existing sections. To change any of the information for the new section, see the steps in Editing or Deleting a Section.

Note: Only activities that you can edit have buttons next to them. Buttons indicate that you can schedule, edit, delete, or submit final credit for an activity. School administrators can only conduct these actions for their school activities.

Edit Activities and Resources

This chapter focuses on creating, managing and editing activities and resources, and associating them with professional development standards. It also describes how to add prerequisites and schedule sections for activities.

Activity Details Page

The Activity Details page may be accessed from various locations in Educator Development and other areas in the system. It is the landing page for interacting and gathering information about an activity. Various actions can be performed, depending on your permissions for working with the activity and/or eligibility to register for it.

Actions for activity participants:

- **Register**. If you meet all eligibility criteria for an activity, such as prerequisites and job role, you will have a Register button. You may also have **Add Me To Waitlist** or **Request for Registration** buttons, if waitlists or requests are enabled. You can also cancel your registration later from this Activity Details page.
- **Recommend**. With the proper operation, you may recommend an activity to specific users or all users at an institution. See Recommend Activities and Resources for more information.

Actions for activity administrators:

- **Edit Activity**. Edit several aspects of an activity, such as eligibility criteria, contact information, and fees. See Create and Edit Activities for a full list of settings that can be edited.
- **Schedule Section**. Schedule and manage sections by providing a section name, location, website, attendee information, and other related details. See Schedule Sections for more information.
- **Manage Expenses**. Add expenses to an activity. See Add Activity and Section Expenses for more information.
- **Manage Forms**. Associate new forms and/or run reports. SeeAssociate Forms with an Activity Associate Forms with an Activity for more information.
- **Archive Activity**. Click to archive the activity so participants can no longer register for it and it will be removed from PD Search results.
- **Delete Activity**. Delete the activity (you will be prompted to give a reason for deleting the activity before it is finalized). See Edit or Delete an Activity for more information.

Create and Edit Activities

All users with the Create and manage PD activities operation have a link in the Educator Development dashboard called Create Activities, as well as an **Edit** link on each Activity Details page. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

For district-level users using a single district solution

1. Hover over the **Educator Development** header and click **Create Activity**.
2. Select whether the activity will be **School-based** or not (limited to users in one school or not limited so it can be taken by users in a city, district, etc.) by selecting the appropriate radio button. If the activity is school-based, also select a date and time for the activity.
3. Complete the form, entering the title, ID, grade levels, etc. Fields with an asterisk (*) are required. For more information on required or optional fields, refer to the Activity Information Options table in this help file.
4. When you are finished with all fields, click **Save** at the bottom of the page.
5. If you have selected a school-based activity, all sections will also be created. Click **OK**.
6. Optional: For school-based activities, you can click **Register All Eligible Attendees** to automatically register participants who meet your eligibility criteria. If you are registering many attendees using this method, it will run as a background task, and you are free to navigate to other pages in the system. Once completed, a notification will display at the top right corner of your screen.
7. Click **Go to Activity Details** to view the activity. The Activity Details page is the starting point for the activity-related tasks such as associating standards, scheduling sections, editing the activity, and managing forms. You may also view this page later by finding the activity in PD Search.

   Location cannot be added to activities until sections are created. To associate a location with sections of an activity, select **Scheduling Sections** from the drop down on the Managing Activities page. See Scheduling Sections for more information.

System Operators can create activities and schedule sections available to the entire district. If a district has regions, District Administrators must be assigned to all regions in order to create activities that are available to the entire district. District Administrators assigned to select number of regions can only create activities available to those regions. School Administrators can only create activities available to individuals at their own schools.

For state-level users and district-level users using a state or multi-district solution

1. Hover over the **Educator Development** header and click **Create Activity**.
2. Complete the form, entering the title, ID, grade levels, etc. Fields with an asterisk (*) are required. For more information on required or optional fields, refer to the Activity Information Options table in this help file.
3. When you are finished with all fields, click **Save** at the bottom of the page.
4. Click **Go to Activity Details** to view the activity. The Activity Details page is the starting point for the activity-related tasks such as associating standards, scheduling sections, editing the activity, and managing forms. You may also view this page later by finding the activity in PD Search.

   Location cannot be added to activities until sections are created. To associate a location with sections of an activity, select **Scheduling Sections** from the drop-down on the Managing Activities page. See Scheduling Sections for more information.

Activities created by system operators at the district level can be taken by users at other districts, should they meet all prerequisites and eligibility criteria.

Activities created by system operators at the state level or at other districts, whether statewide or state-only, cannot be edited by system operators at other districts.

Activity Information Options

Basic Information Options	Description
School-based Activity (required by district users; hidden when creating an activity available to "All State and District Employees")	Create a PD activity for the entire school. When selecting Yes for school-based activities, all sections are automatically created. A date and start/end times are required. • Yes • No
Activity Title	Title of the activity that displays in PD Search.
Activity #	Enter a unique identifier for the activity.
Sessions	Enter numeric value to identify activity sessions. Example: • 100 • 200
Internal Department	Select the department from within your school district to review the activity prior to approval. If approval is optional or required in order to create the activity, you must select an internal department or an external provider.
External Provider	Select a provider outside your school district to review the activity prior to approval. If approval is optional or required in order to create the activity, you must select an internal department or an external provider.
Activity Type	Choose the type of activity. Examples: • Classrooms in action • School-site Workshop • Professional Development Day Workshop • Facilitated Courses • Student Teacher Supervision

Basic Information Options	Description
	• Other • Past Credit Transfer This option is customizable for each school district and is added by System Operators.
Grade Level(s)	Select the grade levels that are relevant to the activity.
Description	Enter a description of the activity. This information displays on PD Search.
Related Documents	Upload related documents. The application supports the following formats: .doc, .xls, .ppt, .txt, .pdf, .epub, and .mobi.
Initiatives	Add or edit the initiatives that the activity satisfies: Examples: • Classroom Management Skills • ELA-E Qualification • Advanced Math Instruction This option is customizable for each school district and is added by System Operators. This field is not available when Available to is set to "State and District Employees" (for state level users only).
Content Areas	Add or edit the content areas. Activity Types are determined by the school district. Examples: • Positive Classroom Culture and Climate • High-Impact Instructional Moves • Masterful Content Knowledge This option is customizable for each school district and is added by System Operators.
PD Standards	Add or edit the PD standards that are aligned to the activity. You can expand the standards to pick the skills and sub-skills below them. **Note:** These standards are customizable for each school district and are imported into the system by external providers.

Basic Information Options	Description
Curricular Standards	Add or edit the curricular standards that are aligned to the activity. You must expand these standards to pick the ones below them (they will not be selected by default). See Add Curricular Standards for more information.

Contact Information Options	Description
Name	Enter the name of the individual to be contacted regarding the activity.
Phone	Enter the phone number of the individual to be contacted regarding the activity.
Email	Enter the email address of the individual to be contacted regarding the activity. Must be a valid email address.

Registration & Scheduling Options	Description
Delivery Method	Determines the delivery method for the activity: • In Person • Online
Related URL	Uniform Resource Locator (URL) on the world wide web used for online activities.
Approval Required for Registration	Determines whether attendees can register for an activity without approval.
Available to (state or multi-district solution only)	Default selection for creating activities is "Only Employees of the district/state", which means only employees who are assigned to a district or state will be able to find the activity in PD Search and enroll in the activity (if they meet all participant eligibility criteria and prerequisites). Select "All State and District Employees" to let employees assigned to your state and all the districts in your state enroll and find the activity in PD Search. Selecting "All State and District Employees" will also remove School Selection, Region Selection, and Initiative Selection from the Participant Eligibility Parameters, as well as remove Initiatives and the option to make the activity school-based from this form.

Registration & Scheduling Options	Description
Participant Eligibility	Add or edit requirements for participants that will make them eligible to take an activity, such as being in a certain region or initiative. This will take you to a new page which you can edit. See Using Activity Eligibility for more information. State-level users only: Region, School, and Initiative eligibility criteria are not available when Availability option selected is All State and District Employees.
Prerequisites	Add or edit prerequisite activities that are required before an attendee can register for your activity. See Adding Prerequisites to an Activity for more information. State-level users only: Your selection for the "Available to" field will determine what activities you can include as prerequisites. "State Employees Only" will allow you to only add activities tagged with "Only Employees of the state" as prerequisites. "All State and District Employees" activities can be given as prerequisites for "Only Employees of the state" and "All State and District Employees" activities.
Allow Waitlist	Allows potential attendees to be added to a waitlist. • Yes - Default • No
Allow User to Cancel Registration	Allows registered attendees to cancel their registration online without having to submit a cancellation request to the activity facilitator. • Yes - Default • No
Allow Late Registration	If late registration is enabled for an activity, participants can register before the last session has passed, even after the registration end date. • Yes • No - Default
Allow participants to print certificates once credits are awarded	Once credits are awarded, allows attendees who have completed the activity to view and print certificates from **My PD Profile**>**Activities** tab. • Yes - Default

Registration & Scheduling Options	Description
	• No

Certification Options	Description
Credit Type(s)	Enter the number of contact hours that will be awarded upon completion of the activity. Attendees may only receive one credit type per activity. Example: • CEUs • Semester Hours • Other custom credit types
Recertification Category	Select the re-certification category. Examples: • District Workshop • Non-district Professional Development • Individual Professional Development This option is customizable for each school district and is added by System Operators.
Notes for Activity Catalog	Enter notes to display in the Activity Catalog (PD Search).
Activity Fee	Enter an activity fee amount. The amount must be numeric and include 2 digits after the decimal (nn.nn).

Note: Custom fields beyond these may be added by your System Operator. If you have any questions regarding these, click the **Contact Us** button on the footer of any page.

Edit or Delete an Activity

Administrators can edit or delete an activity, as explained below:

- **Edit the activity** to change the information that you entered on the Create Activity form. Changes apply to all existing sections. Access the Activity Details page through **Manage Activities** or through PD Search.
- **Edit the section** to change scheduling information such as location, date/time, or facilitator. Access this through the **PD Search**.

To edit, archive, or delete an activity (including all its sections):

1. Locate the Activity Details page either through PD search (refer to Using the Activity Details Page).
2. Click the **Activity Name**.
3. To **Edit**, select **Edit Activity** from the drop-down, make your changes, and click **Save**.
4. To archive, select **Archive Activity** from the drop-down.
5. To delete, select **Delete Activity** from the drop-down.

Note: Archiving Activities removes them from the default view of the **PD Search** results.

6. Deleting activities will delete all sections as well as all credits that have been awarded for that activity. You must enter a reason for deleting the activity which will be shared with any attendees who were already enrolled. Click the **Delete** button to confirm the deletion.
7. Participants will receive email notifications of activity and section deletions.

Note: Only users with the operation **Delete activity or section with data** will be able to delete an activity or section for which attendance or credits have been submitted. Contact your System Operator to request this operation.

Add Curricular Standards

Sometimes in an educator's professional development, an activity or resource can cover areas of a district's curriculum, for example, an area of computer science or math. In Educator Development, these areas are called curricular standards and can be aligned to activities and resources while creating or editing them.

Note: These standards are customizable for each school district and are imported into the system by external providers.

To add curricular standards to an activity or resource:

1. While creating an activity or resource, click **Add/Edit Curricular Standards** or **Add** next to the Curricular Standards field.
2. Filter your results by using the drop-downs.
3. Select the checkboxes next to the standards you would like to add. You must expand the list of standards to select the checkboxes next to the ones below them individually, or click on the standard name to select all the standards below it on its hierarchy.
4. Click **Associate Standards**. You can add, edit, or remove the standards back on the create or edit activity or resource pages.

Add Prerequisites to an Activity

Administrators can determine prerequisite activities that must be completed before a user can register for an activity. If the user has not completed **all** of the prerequisite activities, they will not be able to register for the activity. Admin users can override this by registering the users for a section regardless of whether they have completed the prerequisites.

To add prerequisites to an activity:

1. When you create or edit an activity, click **Add/Edit Prerequisite** under the Registration and Scheduling section.
2. Use the criteria provided to search for the prerequisite activity and click **Go**.
3. Click the **checkboxes** next to **Activity Names** to select activities as prerequisites.
4. Scroll to the bottom of the page, and click **Add prerequisites** . This will return you to the Create Activity page and the selected prerequisite activities will be displayed.

Note: To remove a prerequisite activity, edit the activity, and scroll down the page to the Prerequisites field. Click the **remove** link next to the prerequisite activity name, and save your changes.

Activity Eligibility

PD Administrators can set eligibility criteria that users must meet to register for an activity. To be eligible for an activity, users must meet the criteria selected in each category. Like prerequisite completion, admin users can override eligibility requirements by registering the users for a section regardless of whether they meet the criteria.

To determine eligibility criteria for an activity:

1. When you create an activity, select **Add/Edit participant eligibility criteria** in the Participant Eligibility section. This will display the Participant Eligibility Parameters.
2. Expand eligibility categories to view options.

   If you select parameters in more than one category, e.g., Schools and Job Titles, users must match in every selected category. In this case, the user would have to work at one of the selected schools and would have to have one of the selected job titles.

3. Check the **boxes** and use the links to determine who should be eligible for this activity. Choose the **Select All** box to select all items in a particular eligibility category.

   If you select parameters in more than one category (e.g., Schools and Job Titles), users must match in every selected category.

4. Click **Save** when you have made your selections to return to the activity information with your parameters displayed.

Enter Multiple Credit Types for an Activity

When you create an activity, you can enter multiple types of possible credits to award participants who complete the activity. When users register for the activity, they select the type of credit they want to receive for it.

To enter multiple credit types for an activity:

1. On the **Create (or Edit) Activity** page, each credit type will show up as its own field, e.g., "Hours", with a blank text box next to it.
2. Enter the number of credits possible into the text box for the corresponding credit type. The number of credits possible does not need to be the same as the number of seat hours for that activity.

Archive and Unarchive Activities

District administrators can archive an activity in order to hide it from PD Search results.

To archive an activity

1. Hover over the **Educator Development** header and click PD Search.
2. Use the search tools to locate the activities you would like to archive, or leave all fields blank and click **Search** to view all activities.
3. Click the **Activity Name** for the activity you would like to archive.
4. Select **Archive Activity** from the drop-down menu. The activities will no longer appear in **PD Search**.

To activate an activity (remove from archive)

1. Click the **Educator Development** header.
2. Click **Activities** > **Manage** under Tools & Reports.
3. Use the search tools to locate the activities you would like to activate (remove from archive), or leave all fields blank and click **Go** to view all activities.
4. Select **Activate Activity** from the drop-down in the Action column. "Activity activated successfully" immediately appear in red next to the **Archive** button above. The activity is no longer in the archive and will appear in **PD Search** results.

Create and Edit Resources

Resources are documents, videos, podcasts, or other media that educators can use to enrich their professional development process. Resources can be created either individually through a form or bulk uploaded using a spreadsheet.

Tip: Any individual with the Create and manage PD resources operation can create resources that may be used by teachers in their state or district. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

To create and edit resources through a form

1. To create a new resource, hover over **Educator Development** and click **Create Resources**. To edit an existing resource, locate the resource using PD Search and click the **Edit** link in the search results.
2. Select from one of the available resource types (these are configurable by system operators in your state or district).
3. Select a format from the drop-down.
   - *For videos, podcasts, or external links*: You must also enter a URL for the resource. For videos, you can optionally add an embed code to allow users to play the media without leaving the system. Click the **Preview** button to check that your embed code works; a lightbox opens that displays your video exactly as it will appear to others.

     Note: Information entered in any video player (in a Comments section, for example), will not be saved in the system, but in whatever external provider hosts the video player. The system only tracks who has clicked the resource (by running a report under **Educator Development > PD Reports > Resource Usage**).

   - *For documents*: You may include e-book formats so attendees can add them to their electronic devices.
4. Enter a title and description.
5. For state and multi-district administrators: Select whether the resource will be available to only employees assigned to your state or district, or all employees assigned to your state and any district in it.
6. Click **+Add** and align the resource to at least one PD standard (if required). You can expand the list to include more levels of standards by clicking the **+** next to each standard.
7. Optional: Click **+Add** and align the resource to at least one curricular standard, content area, initiative, grade, and/or job category.
8. Click **Save** when you are finished. The resource is now available to users.

Note: All the metadata entered about a resource (comments, content areas, job categories, etc.) can be used to search for the resource using PD Search.

To bulk upload resources

1. Hover over **Educator Development** and click **Create Resources**.

2. Click **Import Resources**.
3. Download a sample file and save it to your computer.
4. Make the applicable changes making sure to include data for of the all required fields.
5. Click **Choose File** and locate the file and click **Open**.
6. Click **Import**. If there are any errors the application will give the user the line number along with the errors. Once all of the file errors have been resolved, repeat Steps 3-5.

> **Note:** Resources will be created only if there are no errors during the upload process. To find successfully imported resources, search for them using PD Search.

Understanding resource upload properties

Field	Description
Category (required)	• Classrooms in action • Planning Tools & Tips • Professional Learning Networks • Lectures, Webinars and Podcasts • Self Directed Courses • Other customizable categories **Note:** When using this bulk upload tool, make sure they match whatever customizable categories are currently set up or they will not be indexed in PD Search. If you need an example of how to format these categories, download the sample CSV, which will be pre-populated with all the resources available.
Format (required)	Identifies the resource format: • Video • Document • External Link • Podcast
Title (required)	Title of the professional development resource as it will appear on PD Search.
Description (required)	Displays on PD Search provides a description of the resource.
Source (required)	Identifies the teacher evaluation and coaching system from which a resource has been loaded. Example: Teacher Compass
URL	Uniform Resource Locator (URL) address used to link to web site.
Embed Code	Embed code for the externally hosted video, for the video to be played in a

Field	Description
	lightbox, without redirecting out of the application.
PD Standard (required)	Represents the PD standard that is mapped to a resource. Use a separate column for each standard to be mapped (maximum of five). Example: Demonstrates care, interest in and respect for students and their communities and cultures.
Curricular Standard	Represents the curricular standard that is mapped to a resource. These standards must be denoted by their code rather than name, which can be found by looking at the curricular standards list when creating a single resource. Use a separate column for each standard to be mapped (maximum of five). Example: SS-EP-1
Job Category	Specify up to two job categories to align the resource to. Example: Teacher, Assistant Principal
Content Area	Represents the content focus for a resource. For multiple content areas, use a separate column to associated each content areas for a resource (maximum of five). Example: Mathematics, Science
Initiative	Represents the initiative that is satisfied by the resource. For multiple initiatives, us a separate column for each initiatives. Example: Initiative Classroom
Grade Range Start	Specify the starting grade range that is relevant to the resource Example: 7th Grade
Grade Range End	Specify the ending grade range that is relevant to the resource. Example: 9th Grade
Availability (required, multi-tenant and state solution only)	Specifies whether the resource will be available statewide or to users at the same district only. The only valid values are "statewide", "state-only", and "district-only".

Edit or Delete a Resource

PD administrators can edit or delete a resource once it has been created through the Resource Details page.

To edit or delete a resource:

1. Locate the resource using PD Search.
2. Click **Details** to view the Resource Details page.

3. Click either edit or delete, depending on what you want to do with the resource.

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Forms and Expenses

This section focuses on managing forms and tracking expenses associated with activities.

Complete Online Forms for Activities

Certain activities have forms---such as evaluations---associated with them that you may need to complete. Responses to online form are anonymous. Your facilitator will be able to see whether or not your forms have been submitted but will not know which attendee gave which responses to the form's questions.

To access online forms for activities:

1. Click the **Educator Development** header.
2. Click the **form type** you would like to complete under the Forms to be Completed section.
3. Complete the information and click **Submit**.

Note: The link to the form will only display on your homepage until you submit it. If there are no links in the Forms to be Completed section of your homepage, you do not have any outstanding forms to submit.

View Submitted Online Forms for Activities

After you complete an online form for an activity, it is available through your PD Plan.

To view a submitted form:

1. Hover over the **Educator Development** header and click **My PD Profile**.
2. Click the **Forms** tab.
3. Select an **activity** from the **All Activities** drop-down to display forms for the specific activity. If no forms have been associated to any activities, nothing will appear in this drop-down.
4. Click any **form name** to view the submitted form.

Complete a Reflection

After each activity that requires approval (both internal and external), you must fill out a reflection form to receive credit.

1. Hover over the **Educator Development** header and click **My PD Profile** under **Dashboard**.
2. Click the **Activities** header.
3. Click **Approved** next to the specific activity.
4. Click **Complete Reflection** and fill in your reflection.
5. Click **Submit External Professional Development Activity**.
6. In **My PD Profile**, **Activity Request** will now display **Pending Facilitator Verification**.

7. Once **Activity Request** displays "complete" and **Participation** displays "complete," you will receive the activity credits.

Note: The Complete Reflection button only displays when an activity's End Date is in the past.

Add Activity and Section Expenses

Administrators may add expense items to an activity's sections, sessions, or participants, and for activity recertification requests.

For activity sections, sessions, or participants:

1. Find the activity in PD Search or wherever else you may have it bookmarked or saved.
2. Click an **activity name**, or expand Show # Sections and click a **section name**.
3. Select **Manage Expenses** from the drop-down.
4. Click **Create New Expense Item** .
5. Complete the form and click **Save**. The item will appear in the expenses list for the section.
6. Optional: To edit or delete activity expenses later on, repeat steps 1-3, click the expense category, then description if there are multiple expenses under the same category and click Edit or Delete.

For activity recertification requests:

1. Click **Educator Development**.
2. Click **Review Approval Requests** under Tools & Reports.
3. Enter search criteria and click **Go**.
4. Click an **activity name**.
5. Click **Edit Request**.
6. In the Recertification section, click **Add Expense**.
7. Complete the form and click **Save**.
8. Optional: To edit or delete expenses later on, repeat steps 1-5 and click edit or remove beside the expense you created.

Note: When administering or taking activities, users should be aware of two concepts: section and session. A *section* must be created in order for an activity to appear PD Search. A section might have multiple *sessions* with multiple dates and locations. See Scheduling Sections for more information.

New sections of activities that have existing sections will by default inherit the same expenses associated with the most recently created section. You may edit or delete the inherited expenses.

Associate Forms with an Activity

Forms can be used to conduct activity evaluations, pre- and post-assessments, and to meet other survey needs for an activity. Forms are associated at the activity level; the forms associated with an activity are available to all sections but are managed on a section-by-section basis.

To associate a form with an activity:

1. Click the **Educator Development** header.
2. Click **Activities** > **Manage** under Tools & Reports. Search for the activity with which you wish to associate a form.
3. Select **Manage Forms** from the drop-down.
4. Click **Associate New Form** and select the radio button to the left of the form name to associate the form.
5. Click **Continue**.

   Click the form name to view the form. Forms are configurable by the System Operator. The district can choose to configure the fields in the existing forms or add in new forms.

6. Determine whether the form should be completed for participants to receive credit for the activity by using the **Yes** and **No** buttons.
7. Select a default activation date and click **Save**.
8. The form will display in the activity's Manage Forms listing.

Set Form Parameters

1. Locate the form in the activity's **Manage Forms** listing.
2. Click **Update Parameters** next to the form.
3. Click **Submit** to save the form's new parameters.

Activate and De-activate Forms for a Section

An administrator or facilitator must activate forms for a section in order for the form to be available to the section's participants. Activating a form sends an email notification to all registered attendees of the section, providing them with a link to the form. The form will also be added to the attendees' homepages, in their "Forms to Complete" list.

The steps

1. Locate the Section Details page.
2. Select **Manage Forms** from the drop-down.
3. Active forms have a checkbox in the corresponding box in the Activate Form column. Set the activation date and time to a date in the past to activate the form; set it to a date in the future to keep it deactivated until then.
4. Click **Save**.

Remove a Form from an Activity

1. Locate the form in the activity's **Manage Forms** listing.
2. Click **Remove** next to the form.

3. A warning will pop up in a new window asking you to confirm that you want to remove the form. Click **OK**. The form will be removed from the activity and unavailable to activity participants.

Complete a Form

Activity participants can complete a form by using either of two links:

1. Click the **Educator Development** header and click the form link under **Forms to be Completed** section, or click the link in the **email notification** that the form is available.
2. Complete the fields and click **Save**.

Track Submission of Required Forms

Administrators and facilitators can track which activity participants have not submitted required forms.

To track submission of required forms for a section:

1. Locate the Section Details.
2. From the drop-down, select **Review Forms**. This opens the form completion report for the section in a new browser window.

Note: Alternately, you can view which participants in a section have not submitted required forms by selecting **Submit Final Attendee Credit** from the drop-down and viewing the Required Form Submitted column.

Activity Recertification Credit

This section focuses on requesting and approving recertification credit, which educators may use for salary points, license renewal, higher accreditation, or other benefits.

Submit a Recertification Request

Recertification Requests are completed for external professional development activities. These are activities offered outside your school or district. Depending on your district requirements, you may need approval before attending an external activity. Use the system to submit a request and track the approval status. Once you complete an approved, external activity and a reflection form, you can see the credits in your PD Profile.

1. Click the **Educator Development** header.
2. Click **Recertification Credit** > **Request** under Tools & Reports.
3. Complete the information and click **Submit for Review**.

Note: This link is available to all users, including administrators, who have PD Profiles.

After submitting the form, a confirmation page will display, and the activity will appear in the **Activities** page of your PD Profile with a status "pending approval."

Note: You can track the approval status in the Activities page of your PD Profile.

4. If an administrator does not approve a recertification request, you can use the **Edit Request** feature to resubmit (or appeal) a request. See Edit and Delete Activity Requests.

Track the Status of Registered Activities and Recertification Credits

Use the **Activities** link in the PD Profile pages to track the status of activity and recertification requests by yourself or by whose PD Profile you are viewing.

Some highlights of this page include:

Seeing Activity Participation

- Activity requests that have not yet been reviewed have Participation classified as “Pending Approval.” After activity approval has been submitted, the status will either be “Approved” or “Not approved.”
- Once an activity is approved and completed, it will have a "Completed (Forms Outstanding)" status on this page, in which case the forms can be accessed by clicking the activity name and must be completed before credit can be assigned.

Viewing PD Certificates and Transcripts

- View and print out PD Certificates of Completion by clicking the View Certificate button next to an activity.

- View and print out PD Transcripts by clicking the View PD Transcript button at the bottom of this page.

Track and Approve Recertification Requests

See the stepsThe steps:

1. Click the **Educator Development** header.
2. Click **Recertification Credit** > **Review** under Tools & Reports.
3. Use the drop-down menus to locate activities by Submitter, Activity, Category, Delivery Method, Approval status or Verification status and click **Go**. Activities that require your approval will sort to the top of the list and have a drop-down menu in the "Approved?" column.

   If needed, you can click the section name link to open its Section Details, which displays the information that the individual person provides on the recertification request.
4. Select **Yes** or **No** in the **Approved?** drop-down menu. You may review and approve multiple activities pending approval before clicking **Submit Requests for Approval**. Any activities that you do not submit a decision on will remain in the listing.

If any activity is also pending approval from the School or District, its status will change to “Pending District Approval” or “Pending School Approval”. If another approver has already approved the activity, or if another approver is not required, the status (in the individual’s PD Profile) changes to “Approved.” When an activity is not approved, its status becomes “Not Approved.”

Note: An individual can resubmit a request by using the “Edit Request” option. The administrator can then approve a request based on new information. The request appears as “re-submission/appeal” in the list of requests.

View Comments and Delete Recertification Requests

The submitter can see the approver’s comments by viewing activity request details:

1. Hover over the **Educator Development** header and click **My PD Profile**.
2. Click **Activities**.
3. In the **Activity Request** column, click on the **status** link (e.g., Approved) to view related comments at the bottom of the page.
4. If you are not waiting for approval for an activity, you can delete an activity request. Simply click the **Delete Request** button.

Note: If you are not approved for an activity, you can edit a request to provide more details for consideration and re-submit it.

Determine Recertification Request Reviewers

School, district, and state administrators may be flagged as Reviewers for recertification requests submitted by the individuals in their schools, regions, or states. Reviewers submit approval and verification decisions for recertification requests. To flag a user as a reviewer for these requests, add the **Approve registration and credit requests** operation to their user account through User Management.

Review Recertification Requests

After an individual has been approved for external recertification credit, the individual completes the reflection form and their activity credit gets verified by an administrator. Recertification requests can be verified by a district, state, or school administrator, depending on settings their system operator sets.

> **Note:** State administrators may award credit to any participant from districts or schools in their state, but district administrators are prevented to do so for state-only and statewide activities.

To submit verification or approval for an external activity request:

1. Click the **Educator Development** header.
2. Click **Recertification Credit** > **Review** under Tools & Reports.
3. Select **Pending Approval** in the **Approval Status** drop-down. If you would only like to see requests that require verification, select **Pending Verification** from the Verification Status drop-down as well.
4. Click **Go** .
5. Click the drop-down under Approved? and select **Yes** or **No**. You may select an approval status for several requests at once. Repeat the process in the Verified? column.
6. If you would like to add a comment to your approval request response, enter it into the Reviewer Comments field. Comments have a 2000 character maximum.
7. When you are finished, click **Submit Requests Approval**. Users will be able to see if you included a comment with your approval or rejection.

> **Note:** If there is no drop-down under the Verified column, verification may not be required (your system may require leadership or administrator verification only, both, or neither). Also, check that the activity end date is in the past, that the request has been approved, and that the individual has completed the reflection.

Edit Recertification Requests

If an activity in PD Search does not require pre-registration approval, individuals can edit or delete their recertification requests for the activity. If an activity does require pre-registration approval, individuals will only be able to edit or delete submitted requests after their request is reviewed. Individuals can edit or delete requests for externally submitted activities at any time. Administrators can also edit requests for individuals.

1. Click the **Educator Development**header.
2. Click **Recertification Credit** > **Review** under Tools & Reports.
3. Use the drop-down menus to locate activities according to the filters and click **Go**.
4. From the list of results, click the **activity name** to view its recertification request details.
5. Click the **Edit Request** button to edit without triggering additional approvals.
6. Click Submit for Review when done editing the recertification request.

Send Certification Renewal Reminders

Educator Development allows PD Administrators to view certification details and send renewal reminders to users whose certificates have expired or are close to expiry.

1. Click the **Educator Development** header.
2. Click **Certification Details** under Tools & Reports.
3. Sort certificate details by however you would like to send the renewal reminds. Suggested columns you can sort by include:
    - **Expiration Date**: sorts users by certificate expiration date.
    - **Past Expiration Date**: sorts users by those with certificates that have already expired.
4. Select users you would like to send certification renewal reminders to by clicking the checkbox next to their names.
5. Click **Send Renewal Reminder Email**.

Facilitate Activities

In Educator Development, facilitators are persons primarily responsible for leading an activity. They oversee many tasks for managing activities, such as tracking attendance, managing late registration, and assigning credit. Facilitators are assigned to activities when they are created.

View Facilitator Activities

Activities have facilitators associated to them, who have the responsibility of tracking attendance, assigning credit, and various other tasks. On My PD Profile, only users who are facilitators will have the Facilitating Activities tab. Most facilitator tasks are performed on this page.

1. Hover over the **Educator Development** header and click **My PD Profile** under Dashboard.
2. Click the **Facilitating Activities** tab.

Print Sign-in Sheets

Before an activity occurs, you can print sign-in sheets that list all of the registered attendees, and have space for people who attend the event without registering for it ahead of time (walk-in attendees).

1. Click **My PD Profile** > **Facilitating Activities**.
2. Click the desired **activity name**.
3. Click **Track Attendance**.
4. Click on the **Print Sign-In Sheet** link to open the sign-in sheet in your default .doc program.

Note: Just before Session time, print the Activity Sign-In sheet to best track attendance. After the Session, you can record attendance in the application using the Status column. Use the Add Walk-Ins button to record anyone who attended but did not register.

Track Session Attendance

For facilitators:

1. Hover over the Educator Development header and click **My PD Profile** under Dashboard.
2. Click the **Facilitating Activities** tab.
3. Click the **activity name**.
4. Click **Track Attendance** next to the session you would like to change status for.
5. Select a session status for all attendees of the section.

   The default session status is Attended, but until attendance is saved at the bottom of the form, their attendance will not be recorded.

   You may also track attendance by printing out the sign-in sheet on this page, and recording the results later on this form.

6. Enter or change the duration of the attendance by hours and minutes in the Duration (hh:mm) column.
7. Click **Save** .

   Facilitators who are permitted to award credit will see an additional button at the bottom of the screen called Save and Review Final Credit. This button will save the attendance information and direct you to the award credit screen. Clicking the Save button will send you back to the Section Details page.

Note: While *attendance* in any session can be entered for a double-booked participant regardless of whether that request has been approved, *final credit* cannot be awarded to any participant of a double-booked activity until the double-booking has been approved by that facilitator on the Review Approval Requests page.

For administrators:

1. Hover over the Educator Development header and click **PD Search** under Dashboard.
2. Search for an activity.
3. Click **View # Section(s)**.
4. Click **Track Attendance**.
5. Click **Track session attendance** next to the session you would like to change status for.
6. Select a session status for all attendees of the section.

   The default session status is Attended, but until attendance is saved at the bottom of the form, their attendance will not be recorded.

   You may also track attendance by printing out the sign-in sheet on this page, and recording the results later on this form.

7. Enter or change the duration of the attendance by hours and minutes in the Duration (hh:mm) column.
8. Click **Save** .

From the Track Attendance screen, facilitators can also do the following tasks:

- Register attendees
- Add walk-ins
- Print sign-in sheets
- Email attendees of the activity
- Delete registered attendees
- Submit session attendance

Submit Session Attendance

Attendance must be taken for participants of an activity before final credit can be assigned. Facilitators can take attendance from the Track Attendance page.

To track attendance for sessions:

1. Hover over the Educator Development header and click **My PD Profile** under Dashboard.
2. Click the **Facilitating Activities** tab.
3. Click the **activity name**.
4. Click **Track Attendance** next to the session you would like to change status for.

   When the table on this page appears yellow, it denotes that attendance has not been taken. Once it has been taken at least one (you can go back to this page to edit it at any time), the table will appear white).

5. Optional: Change the session status for all attendees of the section. The default status is attended, but until attendance has been saved at least once, participants will not be recorded.
6. Optional: Change the duration of the attendance by hours and minutes in the Duration (hh:mm) column.
7. Click **Save** at the bottom of the form.

Facilitators who are permitted to award credit will see an additional button at the bottom of the screen called Save and Review Final Credit. This button will save the attendance information and direct you to the award credit screen. Clicking the Save button will send you back to the Section Details page.

Note: While *attendance* in any session can be entered for a double-booked participant regardless of whether that request has been approved, *final credit* cannot be awarded to any participant of a double-booked activity until the double-booking has been approved by that facilitator on the Review Approval Requests page.

Add Walk-In Attendees

Walk-in attendees are unregistered users for an activity that walk-in during the activity for which facilitators would want to track as attended and possibly assign credit to.

To add walk-in attendees:

1. Hover over the **Educator Development** header and click **My PD Profile** under Dashboard.
2. Click the **Facilitating Activities** tab.
3. Click the **activity name**.
4. Click **Track Attendance**.
5. Click **Add Walk-Ins.**
6. Search for any walk-ins by completing the information. The search results will appear below this form.

7. Click **Add all Attendees as Walk-ins**, or select the checkboxes next to attendees' names and click **Add Selected Attendees as Walk-Ins**.

   Add any walk-in attendees before changing the Session status for registered attendees (or you will have to re-enter their statuses). Walk-in attendees will then be added to this list, and to any subsequent Sessions of the activity listings as "Registered" and to the final credit page.

Note: If the activity is full, walk-ins will be added as "waitlisted" and an admin will have to register individuals from the waitlist.

Administer and Facilitate Statewide Activities

PD administrators and facilitators for statewide activities have different permissions for aspects of managing these activities. For instance, PD administrators at the district where the activity was created can register and remove users, so that their district's users can be enrolled in statewide activities first, if the administrator chooses to do so. The table below details this, and other permission differences:

Role	Permissions
PD administrator at source district or Facilitator at the source district assigned to the statewide activity	• Can register users (including walk-ins) from only their own district. • Can approve registration requests from any user in any district that requested to register. • Can move any user in any district from the waitlist for the activity. • Can add walk-ins from your own district to the activity. • Can change approval status for requests for their own district only. • Can select and remove any user from any district that has registered for the activity from a section on the Track Attendance and Submit Credit for Final Approval pages. • Can see and track attendance for all users from any district. District membership is visible on the Track Attendance page. • Can submit credit for all attendees from any district
PD administrator at another district (not assigned as a facilitator)	• Cannot view or enter attendance for any users at any district, including their own. • Cannot view or award credit for any users at any district, including their own. • Can view and award recertification credit for users at their own district.

Role	Permissions
PD administrator or facilitator at the state the source district belongs to	• If the activity is created by a state administrator, only facilitators at the state level assigned to the statewide activity can register users, take attendance, add walk-ins, add late registrants, and submit and review final credit for all users in any district in their state. • If the activity is created by a PD administrator at your district, they are responsible for managing all of the above for all users in their statewide activity, including users at other districts and users assigned to your state institution (for example, Kentucky Department of Education).
Facilitator at the state level, assigned to the source district (the district that created the activity) as well as the statewide activity	• Can add walk-ins from any district to the activity • Can see and track attendance for all users from any district. • Can submit credit for all attendees from any district

Note: All the associated pages for these tasks (tracking attendance, viewing canceled registrations, etc.) show district membership for participants.

Add Facilitator Notes to an Activity

Facilitators of one section of an activity may have information they would like to share with facilitators of other sections, or with people considering or already taking the activity.

See the stepsThe steps:

1. Locate the activity using PD Search.
2. Click the **activity name**.
3. Click **+ Add a Note** in the Registration and Scheduling section.
4. Enter your note and click **Save**.

   The note now appears under the Facilitator Notes line, with your name, date, and time stamp included. Click **Edit** to edit the note or **Remove** to delete it.

Note: Existing Facilitator Notes can be viewed when accessing an activity from **My PD Profile > Facilitating Activities**. However, notes cannot be added in this way.

Assign Final and Partial Credit

Attendees can consult the **My PD Profile** > **Activities** tab to see their participation and credit status for every activity they have taken. Final and partial credit is not automatically assigned in Educator

Development -- it must be approved by permissioned users or by a state administrator.

Users with the *Award session activity credits* operation can assign final and partial credit for activities in their districts. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations. State administrators can approve credit for all state-only and statewide activities.

To assign final and partial credit for activities completed:

1. Hover over Educator Development and click **My PD Profile**.
2. Click the **Facilitating Activities** tab.
3. Click the **activity name** of the activity you are assigning credit for. If you are facilitating multiple sections of an activity, the activity will appear multiple times on this list.
4. Select **Submit Final Credit** from the drop-down.
5. Select the checkboxes next to the participant names you are assigning credit to.
6. Select Yes, No, or Pending from the Credit for Completion column for the attendee you are assigning credit to. *Yes* means attendance has been taken and the participant has attended, *No* means attendance has been taken and the participant has not attended, and *Pending* means attendance has not been provided.
7. Enter the number of credits granted, and select type of credit, if more than one type is possible.

   The total number of credits for an activity is listed back on the Section Details page (once **Activity Details** has been expanded).

8. Select **Yes** in the Pay Eligible drop-down, if one exists, to note if the participant's expenses have been paid for this activity. Selecting No will not allow you to assign final or partial credit.
9. Click **Submit Final Credit** to assign credit to these participants.

The bottom of this page also has a list of walk-ins for the section. You may view register them for the activity before returning to this page and assigning credit.

While attendance in any session can be entered for a double-booked participant (a participant who has two activities going on at the same time) regardless of whether a request to double-book has been approved, final credit cannot be awarded to any participant of a double-booked activity until the double-booking has been approved by that section's facilitator or a PD administrator on the Review Approval Requests page.

Educator Development Emails

Educator Development makes it easy for you to contact key individuals in the system, such as activity participants. When you send an email, individuals with email addresses in the system will be added as recipients to the email. Each recipient will receive an individual notification but will not see the names of other people in the list.

Email Groups within Educator Development

Educator Development makes it easy for you to contact key individuals in the system, such as activity participants and individuals within a school. When you send an email, individuals with email addresses in the system can be added as recipients to the email. Each recipient will receive an individual notification but will not see the names of other people in the list.

To send emails to users by school:

1. Hover over the **Educator Development** menu and click **School Profile** or **District Profile**.
2. If you are a district user, select a school by clicking on the **school name** .
3. Click **Email Users in List** at the bottom of the page.
4. You can enter more email addresses into the **To** field. You can also delete email addresses from this field.
5. Enter a **subject** and **body** into the fields provided and then click **Send**.

Note: Email recipients will only be able to see their own name on the email.

Email Activity Participants

1. Hover over the **Educator Development** header and click **PD Search**.
2. Type in the full or partial name of an activity into the **Keyword** field to search for a specific Activity.
3. Narrow your search by using the filters to the left.
4. Click **Show # Section(s)**, and then the desired **section name**.
5. Click the **Track Attendance** link for a list of activity participants.
6. Click the **Email Users in List** link at the top of the list. If desired, you can paste additional email addresses into the To field. You can also delete email addresses from this field.
7. Enter a **subject** and **message** into the fields provided and then click **Send.**

2: Manage Initiatives

These topics explain the process of viewing, creating, editing, archiving and deleting professional development initiatives. Please note that only permissioned users can view or manage initiatives in Educator Development.

Find Activities Related to Initiatives

All users with the *View Initiatives* operation can find activities related to initiatives and track their progress in initiatives in Educator Development. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

1. Hover over the **Educator Development** header and click **My PD Profile**.
2. Click **Initiatives**.
3. Click the **view available PD** link in the rightmost column to find activities related to the initiative.

Note: This will link you to a filtered view of PD Search (you will no longer be in your PD Profile).

Create an Initiative

District and state administrators, as well as users with the *Create and manage PD initiatives* operation can create initiatives in Educator Development to enroll and remove participants from the initiative. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

The steps:

1. Hover over the Educator Development header and click **Manage Initiatives** under Admin & Setup.
2. Click **Create New Initiative**.
3. Complete the information and click **Submit**.

After you create an initiative, you can manage it. See Viewing and Editing Initiative Details for more information.

View and Edit Initiative Details

Teachers can view activities and resources related to an initiative they are enrolled in.

To view initiative details

1. Hover over the **Educator Development** header and click **My PD Profile** under Dashboard.
2. Click the **Initiatives** tab. Any initiatives in which you are enrolled displays.
3. Click the **title** of the initiative to display the corresponding Initiative Details page. This page has the following details:

- **Status of Enrollment**: Shows that you are enrolled in the initiative.
- **Items Needing Attention**: At the top of the page, you will see the number of items that need attention. These will include items that are required and have either not been registered for or not viewed 30 days or less until the Finish by date of each Resource or Activity. If no Finish by date is provided, the Resource or Activity will never be marked as needing attention.
- **Initiative Details**: Provided details could include department, contact person and number, start and end dates for the initiative, and the count of required and optional activities and resources for the initiative.
- **Audience**: A description of the audience for this initiative, and other details an initiative creator wanted to provide.
- **Activities and Resources tab**: Provides details about the initiative including requirement status (required or optional), the name of the activity or resource associated with the initiative, the type of item, a Finish by date if applicable, and your status regarding using the item (Not Registered, Registered, Not Viewed, Viewed, Attended, or Completed).

Users with the appropriate operations can edit or archive initiatives, as well as enroll participants on the Initiative Details page. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations. Only System Operators can delete initiatives.

To track participants' progress in initiatives

1. Hover over the **Educator Development** header and click **Manage Initiatives** under Admin & Setup. This page shows a count of participants enrolled in and who have completed all required activities, as well as additional details about the initiative. You can view individual participants' progress by following steps 2-4.
2. Click the **title** of the initiative.
3. Click the **Enrollment** tab. You will see columns next to individuals' names with details about the individual, as well as columns about how many resources were viewed, registered for (which includes registered and attended activities that have outstanding forms, or for which no credit has been awarded), completed (which includes PD for which credit has been assigned), and when next PD is due.
4. Hover over the participant name to see a call-out with links to that participant's Initiative Progress and PD Profile pages.

To enroll or remove participants from initiatives

1. Hover over the **Educator Development** header and click **Manage Initiatives** under Admin & Setup.
2. Click the **title** of the initiative you would like to edit.
3. Click the **Enrollment** tab.

4. Click **Enroll Participants**.
5. Select the **Criteria** that match the individuals you are looking up and click **Go** to display the Participant Results.
6. To remove participants from an initiative, click the checkboxes next to participant names and click **Remove Selected Participants**.

To edit an initiative

1. Hover over the **Educator Development** header and click **Manage Initiatives** under Admin & Setup.
2. Click the **title** of the initiative you would like to edit.
3. Click **Edit** to edit whatever appears under Initiative Details.
4. Back on the main Manage Initiative page, select a requirement from the Requirement drop down next to each activity or resource, and enter a Finish by date (optional, but highly recommended for activities that may only be offered for a certain date).
5. Click **Save**.

The default "-" state means an activity is tagged to an initiative, but is neither required or optional for teachers. Activities tagged with this have an initiative associated with them on PD Search and their Activity Details page, but teachers will not have to take them as part of an initiative and any indicator of progress will not include these items.

Activities and resources are not added to an initiative through this page. This page lists all PD that has been tagged as belonging to this initiative. To remove PD on this page, click the **name** of the activity and edit it so it does not belong to the initiative. To add PD to this page and initiative, locate the PD and edit it so it is tagged to this initiative.

To archive or delete an initiative

1. Hover over the **Educator Development** header and click **Manage Initiatives** under Admin & Setup.
2. Click the **title** of the initiative you would like to edit.
3. Click either **Archive** or **Delete**.

Archiving an initiative removes it from the Initiative drop down lists in the rest of the system, e.g., on the Create Activity page, but shows a record of the Initiative in Enrolled Participants' PD Profiles and in the Manage Initiatives listing. Deleting an initiative removes the initiative from all places in the system, including the PD Plans of enrolled participants.

3: PD Profiles

In Educator Development, every individual and many administrators have their own PD Profile. Each individual can view their own profile, and administrators can view every individual's profile in their school, district, or state.

My PD Profile, an individual's own profile, consists of sections for viewing status of activity requests, viewing activity and teaching certificates, setting and tracking PD Goals, and other PD-related tasks.

Access Your PD Plan

Individuals may only have one active PD Plan at a time. You can, however, also view any PD Plans you have previously archived.

1. Hover over the **Educator Development** header and click **My PD Profile**.
2. Click **PD Plans**.
3. Click the link under the **Status** column to see a PD Plan detail page.

Search for and Review PD Plans

It is easy for individuals to set and monitor their PD Plans. Once an individual has created a plan, appropriate administrators can review, approve or decline those plans.

It may be necessary for a user to have an operation to create and view PD Plans. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

1. Click the **Educator Development** header.
2. Click **PD Plans** > **Review** under Tools & Reports.
3. Enter information in the **Status**, **Institution**, and/or **Last Name** drop-down menus and field and click **Go**.
4. Click any **submitter name** to review the corresponding PD Plan Details page.
5. From the PD Plan Details page, perform any of the following:
   - Use the **+/ -** option or **View** link next to Comments and Decisions to expand or collapse the listing and view comment and decision information.
   - Use the **Add/Modify/Read** link to edit or add a new Decision (Approved, Not Approved, Revisions Requested) and related commentary.
   - Click **Archive** to archive the activity (remove it from being able to be used again by PD administrators or activity registrants, but keep its historical information in the system).
6. With all information entered, click **Save**.

View and Edit Your PD Profile

Note: Districts may disable some sections of the PD Profile. If you feel you are missing a PD Profile tab, contact a District Administrator or System Operator.

From the **Educator Development** menu, click **My PD Profile**. Your PD Profile consists of the following sections:

- **PD Overview**: Provides a summary of your information, including school, grade level, subject (s) taught, and your job category. It also includes a summary of your goals, activities, and mentor and facilitator interactions.
- **PD Goals:** Allows you to create and manage personal professional development goals, based on PD Standards and content areas (e.g., Language Arts, Technology, etc.). The district controls what goals are in the profiles so they are related to the planned tasks. Use the drop-down menus provided to edit goals and related activities. Click the **Set new goal** link to add a new goal. For more information on goal setting, please see Managing Plans, Goals, Plans, and Interactions.
- **PD Plans:** Lists any PD Plan that you have saved and/or submitted. Click any Certification Number to see Plan details, make edits and view status (Approved, Not Approved, Archived or Pending).
- **Initiatives:** Lists your existing Initiatives. Click any initiative name to view related details.
- **Recommended:** Lists all activities and resources that were recommended to you by other users, including completed and not completed ones.
- **Activities:** Offers links to your upcoming activity information such as date, time, and location. Depending on the activity setup, you may even be able to view and print activity certificates.
- **Facilitating Activities**: Offers links to activities that you are facilitating or have facilitated.
- **Forms:** Contains links to any online forms you must complete for your registered professional development activities.
- **Certificates:** Lists all of your Certificates (e.g. Teaching Certificates).
- **About Individual:** Details your personal information, including name, address, employment status, education and work history. Use the Edit buttons or Add Work History link to make changes or include additional information. School and District administrators can also view other individual profiles, and/or the School and District Profile.
- **Reviewer Settings:** Displays a list of review permissions for submitted activity proposals.

Create and Edit PD Plans

PD Plans consist of goals and associated standards teachers select, similar to Professional Growth Plans. Only individuals with an active certification and appropriate operations can submit a PD Plan.

You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

For teachers

To create or edit your PD Plan:

1. Hover over the **Educator Development** header and click **My PD Profile**.
2. Click **PD Plans**.
3. If you have an existing plan, click the plan's **Status** to edit; otherwise, click **Create New PD Plan**.

   The Create/Edit PD Plan is pre-populated with the following personal and educational information:

   - **Plan Type**: Select Teacher or Admin.
   - **Certificates**: Choose one or more certificates.
   - **Goals**: You must enter goals for the PD Plan. Your district controls the number of goals that are required. Click the **Add Another Goal** link to make multiple additions.
   - **Associated Standards**: You must associate standards with each goal. When you click the Select Standards link, you are directed to the Associate Standards page. You can select multiple standards. Click Remove to remove selected standards.
4. All PD Plans must be submitted for review. If you are not finished making changes to your new plan but want to return to it later, click **Save**.
5. If you have completed all entries for your plan, click **Submit for Review**.

For administrators

To create or edit your PD Plan:

1. Click the **Educator Development** header.
2. Click **My Plan** next to PD Plans under Tools & Reports.
3. If you have an existing plan, click the plan's **Status** to edit; otherwise, click **Create New PD Plan**.

   The Create/Edit PD Plan is pre-populated with the following personal and educational information:

   - **Plan Type**: Select Teacher or Admin.
   - **Certificates**: Choose one or more certificates.
   - **Goals**: You must enter goals for the PD Plan. Your district controls the number of goals that are required. Click the **Add Another Goal** link to make multiple additions.

- **Associated Standards**: You must associate standards with each goal. When you click the Select Standards link, you are directed to the Associate Standards page. You can select multiple standards. Click Remove to remove selected standards.

4. All PD Plans must be submitted for review. If you are not finished making changes to your new plan but want to return to it later, click **Save**.
5. If you have completed all entries for your plan, click **Submit for Review**.

View PD Recommendations

The Recommended tab of My PD Profile allows educators to view all activities and resources that have been recommended to them throughout Educator Development. PD can be recommended on the home page and Educator Development dashboards, in activity and resource details pages, and in various other places in the system.

The steps:

1. Hover over the **Educator Development** header and click **My PD Profile**.
2. Click **Recommended**.
3. Optional: Click an activity or resource name to view it, and register or use it, if desired.
4. Optional: Hover over a ℹ icon to view the reason, if provided, that this PD was recommended to you.

Set and Track PD Goals

Educator Development makes it easier for individuals to set and monitor their PD Goals, which can be based on standards or content areas. Once goals are set, teachers can view available activities related to each goal. As they complete activities, users can track their progress by goal.

See the steps

1. Hover over the **Educator Development** header and click **My PD Profile**.
2. Click **PD Goals**. From here you can set a new PD goal either by standards or content areas.
3. For example, by standard, click **Set new goal** under Goals Related to Standards.
4. From the Standards Set drop-down, select a **Standards Set**.
5. Enter your **goal description** and select the **radio buttons** to select a standard.
6. Choose the standard subset that you have based your goal upon.
7. Click **Set Goal**.
8. For content area, click **Set new goal** under Goals Related to Content Area.
9. Enter your goal description, use the radio buttons to select a content area focus, and click **Set Goal.** When you are ready, you can track your goals from this same area:
   a. From the PD Goals page, select **View activity progress by goal** from the Select action drop-down menu next to the goal you wish to track. The My Activities page appears, listing any related activities you've registered for, completed, or submitted for approval.

View Teaching Certificates

1. Hover over the **Educator Development** header and click **My PD Profile**.

2. Click the **Certificates** tab.

Edit Profiles

Administrators and System Operators can edit some PD Profile information for other staff. Specifically, they can edit the following:

- **About Individual, Content Information**: From the About Individual tab in the PD Profile, administrators and System Operators can edit the name, address, and other contact details. Click the **Edit** button to make new or change existing selections.
- **Reviewer Settings**: Only administrators and System Operators can edit this tab in the PD Profile. Administrators and System Operators can edit the Departments and Content Areas associated with the individual and determine if they are a Final Reviewer. Click the **Edit** button to make new or change existing selections.

Individuals must be given the *Review Activity Proposals* operation in User Management in order to review an activity proposal. This should be done prior to being associated with a department or content area in Reviewer Settings. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

Users may also be added to reviewer lists from the Reviewer Settings tab within the District Profile (see Viewing District PD Participation).

PD Profiles (Individuals, Schools, Districts, and States)

Found on **Educator Development** > **Individual PD Profiles**, **School Profile**, **District Profile** and **State Profile**, PD Profiles are available to system operators that show various Educator Development settings and information for an entire district or state. These settings include:

- **PD Overview:** Displays links to each school or district's PD Profiles. Also lists the number of individuals at that school or district with PD Profiles, the number of mentor interactions, and open requests for external activity credit requests.
- **Activity Participation:** Displays a list of all district or state PD activities that have been registered for and/or completed. Many filters are available to narrow down activities related to initiatives, content areas, and specific standards.
- **Reviewer Settings:** Displays all users that are content area, department, and final reviewers for PD Proposals. Click Show Reviews to filter these reviewers, and Add Reviewer(s) to add them. You must filter before you can add reviewers.
- **Facilitator Settings:** Displays all users that may be selected as activity facilitators and provides an option to add or remove users from this list (search a name before adding a new facilitator).
- **About this District/State:** Displays basic contact information about the district or state such as an address, website, and email.

View PD Profiles

The PD Profile consists of multiple sections/tabs: PD Overview, PD Goals, PD Plans, Initiatives, Activities, Forms, Certificates, About Individual, and Reviewer Settings (viewable to only those with appropriate permissions). The PD Goals and Initiatives tabs can be configured by the System Operator and may not appear for every district. You can click any tab name to jump to that section.

Every user can view their own plan. Leadership and system operators can also view others' individual plans.

To open an individual's profile:

1. Hover over the **Educator Development** header and click **Individual PD Profiles**.
2. If needed, use the alphabetical links at the top of the page to locate an individual by name.
3. Click an **individual's name** to open his/her profile. This PD Profile will have the same links and information as the individual will see in My PD Profile. See PD Profiles for more information about these pages.

View School PD Participation

1. Hover over the **Educator Development** header and click **School Profile**. If you are a District administrator you will see a listing of schools; School administrators will see their own school's listing. If needed, you can locate a school by name by using the alphabet links to jump to a name/letter.
2. Click the desired **school name**. There are three links on the side:
   - **PD Overview** displays an overview of each teacher's PD involvement.
   - **Activity Participation** provides a detailed view of all activities available to the school's users. It can be filtered to view only activities relating to a particular initiative or standard and exported to Excel for easy reporting.
   - **About this School** shows the contact information for the school along with a list of School Administrators and their related contact details.

Note: In the School PD Overview, users who have not signed up and/or taken PD Activities or who have a mentor or mentee assignment will appear on this list.

3. To see more details about a specific activity, click **Activity Participation**.
4. Use the **View activities by** drop-down to select "All activities" (default), "Initiatives," "Content areas", or a specific standards set.
5. A second drop-down menu to the rights allows you to select an initiative or teaching standard. The resulting list displays all matching activities for which the school's teachers have registered.

Flag Reviewers

Only reviewers of activity requests and proposals will see the Reviewer Settings tab in their My PD Profile and in Individual PD Profiles. From here, they can associate the departments and content areas and configure if the reviewer will be the final reviewer, and whether the reviewer can submit credit exports. If any content areas of departments are assigned, the user will have permission to review proposals under these categories.

1. Hover over the **Educator Development** header and click **My PD Profile**.
2. Click **Reviewer Settings**.
3. Click **Edit** to add, edit or delete department and content area reviewers or to flag a user as a final reviewer.
4. Select the desired departments or content areas from the **Available** section list and use the green arrows to move them to the **Included** list.
5. To make an individual a Final Reviewer, select **Yes** for Final Reviewer. If No is selected, another reviewer will have to approve a proposal or activity request before it is finalized.
6. To make an individual responsible for managing credit exports, change the Submit Credits Export button from **No** to **Yes**.
7. Click **Save.**

Note: Users must also have the *Review Activity Proposals* operation. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations.

Add Users as Content Area, Department or Final Reviewers

System Operators at the district or state level can determine which users should be activity proposal reviewers of specific content areas, departments, or final reviewers. To update a user's status as a reviewer, the system operator can either update information through the District or State PD Profile. Note that reviewers must have the Review Activity Proposal operation to appear on this list. For information on viewing and editing your own settings as an activity request or proposal reviewer, see Flag Reviewers.

To update information through District or State PD Profiles:

1. Hover over Educator Development and click either **District Profile** or **State Profile**.
2. Click the **Reviewer Settings** tab.
3. Select the type of reviewer you would like to display or add and click **Show Reviewers**. You must select a content area or department before using either of these filters.

   You must select a content area or department before adding a reviewer to that specific content area or department as a reviewer. You cannot add a reviewer to all content areas or departments at one time, but you can add them to multiple areas or departments by repeating steps 3-4.

4. After using specific content area, department or final reviewers filter, click the **Add Reviewer(s)** button to add a reviewer. The Add Reviewer search page will appear.On this page:
   a. Select the search fields to determine your search criteria, then click the **Go** button. A list of employees who match your search criteria will appear.
   b. Select the users by clicking on the check boxes next to their names.
   c. Click on the **Add Selected Reviewer(s)** button to add the selected reviewers to the reviewer list

Reviewer information will appear for the selected users on their individual Reviewer Settings tabs within their PD Profile pages. As an alternative, administrators may choose to add or delete users to reviewer lists from this tab (see Editing Profiles).

The Final Reviewer option will only appear if the district or state has chosen to require final approval for activity proposals in the System settings.

4: Manage Mentor Assignments

Educator Development makes it possible for you to track your mentor interactions and better understand the course of your professional development. You can also view assignments and edit or delete interactions as needed.

View Mentor Assignments

Both mentors and their mentees will see their assignments on the Overview page of My PD Profile.

Mentors can access the PD Profile of their mentees by completing the following steps:

1. Hover over the **Educator Development** header and click **My PD Profile**.
2. From the summary page, you will see a link with your mentee's name.
3. Click this link to go to the mentee's Individual PD Profile.

Add Mentor Interactions

Mentors submit mentor interactions to capture the time spent with their mentees. Specifically, they can record any issues discussed, meeting outcomes, next steps, and reflections. Only the mentor and mentee can view the outcomes, next steps, and reflections. Administrators can only view date, type and duration of interactions.

Note: Mentees cannot log mentor interactions. Only the mentor can.

1. Click the **Educator Development** header.
2. Click **Add Mentor Interaction** under Tools & Reports. If you are not assigned any mentees, this link will not appear.
3. Select an individual from the drop-down menu and enter the interaction information. Required fields have an asterisk (*) beside them.
4. Click **Submit**.
5. Optional: View your submitted interaction by using one of the export options or click the date submitted.

Edit and Delete Mentor Interactions

Note: Only the mentor can edit mentor interactions.

1. Click the **Educator Development** header.
2. Click **Mentor Interactions** under Tools & Reports.
3. Use the **drop-down** to select a single mentor assignment or all (if applicable).
4. From the mentor interaction log, click the **date** under Date Submitted.

5. Click **Edit Log** at the top of the summary to make changes to the mentor interaction, or **Delete Log** to delete it.
6. Click **Submit**.

Update and Delete Assignments

Individuals with the proper permissions can create, view, edit, and delete mentor assignments through the Manage Mentor Assignments and Assignment Details pages. Only system operators can archive mentor assignments.

1. Click the **Educator Development** header.
2. Click **Manage Mentor Assignments** under Tools & Reports.
3. Locate the assignment in the list, and click the **view assignment** link located to the far right.
4. In the resulting Assignment Details page, select the appropriate option:
   - **Edit:** change the mentor or the assigned user
   - **Archive:** the assignment is no longer active, but data persists for reporting purposes
   - **Delete:** the assignment and all associated data (logs) are deleted from the system

Note: The Edit button will only display for district-level assignments created from the Manage Assignments listing.

Manage Mentor Interactions - Administrative Tasks

Mentor assignments can be made within a school or at the district level (across schools). Administrators can assign individuals to mentors. Administrators can view all mentor assignments, and create/edit district-level assignments. Mentors log their interactions with their teacher(s), recording the duration and other information about the interaction, such as interaction type and standards addressed.

Note: System Operators can add custom fields to the Mentor Interaction form by visiting **System** > **PD Planner Settings** > **PD Mentor**. The new fields may be confidential or public.

Search for Mentor/Mentee Interactions

Administrators can view the mentor interaction logs from their schools.

You can select to view all of the interactions occurring at your school, or you can select an individual mentor/teacher pair by doing the following:

1. Click the **Educator Development** header.
2. Click **Mentor Interactions**.

3. Filter your results (mentor, mentee/individual, and data range are required) and click **Go**.
4. From the mentor interaction log, click the name of either the **Mentor** or the **Individual** to access the user's PD Profile About Individual summary.

Assign and Unassign Mentors

School administrators can assign mentors to individuals in their school. Each teacher can have a mentor, and a mentor can be assigned to an unlimited number of mentees.

1. Click the **Educator Development** header.
2. Click **Manage Mentor Assignments** under Tools & Reports.
3. Click **Create New Assignment**.
4. Type in the full or partial name of the desired mentor into the **Select a Mentor** box.
5. As you begin typing, a list will appear below the box displaying the institution, first name and last name, user ID and role of users that match your search criteria. This list will change as you continue typing.
6. Click on the desired mentor.

   All users will appear as a search result option. Only users who have been selected as mentors will have mentoring capabilities.

7. If you wish to select a mentor using criteria other than first name and last name, you may choose the **Advanced User Search** option.
   i. Click **Advanced User Search**. The Advanced User Search page appears.
   ii. Select at least one criterion and click **Go**.
   iii. Click on the radio button to the left of the individual's name and click **Select User**.
   iv. You will return to the Create Assignment page with the selected mentor's information populated in the Select a Mentor box.
8. Repeat steps 4 through 6 in the Select a Mentee box.

   Mentors may have multiple mentees, however a mentee may only have one mentor. If a mentor has already been chosen for a particular user then this user will be a possible mentee option.

9. To remove a chosen mentor or mentee, click **Remove** under the mentor or mentee's name.
10. When you have made both your mentor and mentee selections click **Submit** to complete the assignment process.
11. To delete or archive an assignment (for system operators only), click **View Assignment** on the Create Assignment screen.
12. Click **Delete** or **Archive** at the top of the screen.

13. To unassign a mentor or mentee, click **view assignment** on the Manage Mentor Assignments page and then click **Edit**.

14. Click **remove** under the user's name.

Note: An Edit button will also display for district-level assignments.

5: Pre-Formatted PD Reports

Educator Development allows you to create multiple pre-formatted reports to help track usage in the system for aspects including mentor interaction, PD Plans, Initiative Participation, and more.

Pre-Formatted Report Types

Anyone with the *Run PD Reports* operation can run pre-formatted reports on various details in Educator Development such as Mentor Interactions, Activity Participation, and PD Plans. You can verify your roles and operations by clicking **My Account** and looking under Other Roles and Operations. School Administrators may run school-level reports, District Administrators may run reports on their entire district, and State Administrators may run certain reports on state-wide data, as indicated with an asterisk (*) on the reports list below.

All pre-formatted reports include preset options as well as some optional fields for additional detail. The following table offers descriptions for various report types available:

Report Type	Contents
Mentor Reports	
Mentor Assignment	Mentor assignments in system and summary of interaction data in that assignment.
Mentor Interaction	Mentor interactions submitted in system. Contains information about how the mentor and mentee that can be filtered. Does not contain textual detail of interaction.
Mentor Assignment Summary by Individual	Mentor information (by individual) including the time they have been mentored and the number of logs submitted for them.
Mentor Assignment Summary by Mentor	Mentor information (by mentor) including the time they have mentored and the number of logs submitted by them.
Activities Reports	
Activity Cost Detail	All costs associated with an activity. Section costs are multiplied by the number of sections associated with the activity.
Activity Participation *	A complete breakdown of participation in activities. Each record represents the participation of an individual in an activity, including their current status, along with the credit they have received and when they received it.
Credit Report	Details credit received by individual. This report shows credit that is received through activity participation, loaded from external systems, or received through external credit requests.
Credit Requests	Details requests for credit along with current status of these requests.

Report Type	Contents
Evaluation Summary	Evaluation data for activity, with an average section score and facilitator score.
No-Show Report	The number of activities an individual has missed, as defined by a variable percentage of missed sessions. This allows administrators to analyze who is attending professional development and ensure that registration spaces are allocated to individuals who habitually miss professional development sessions.
Initiative Participation	An individual's participation in an initiative, including how many hours he/she has completed and activities completed
Registration Request	Details requests for registration along with current status.
Section Cost Detail	All costs associated with each section. Section costs are line itemed per section.
Section Summary Report *	Provides a detailed summary of section information.
Facilitator Score	Aggregates activity and facilitator evaluation information grouped by facilitator.
Participant Cost Detail	Report of participant costs associated with an activity section.
Activity Summary Report *	Provides a detailed summary of activity information. The default options include the activity name, activity number, delivery method, number of people registered, number of people completed, average rating and the number of recommendations. With this report, administrators can make improvements to the activity based on participation details.
User Reports	
Certificate	All teaching and administrative certificates managed in the system.
Form Completion	Report of forms completed for a section.
Form Results by Section	A summary of results submitted for a section.
Form Results by Activity	Provides a summary of results submitted for an activity.
PD Goals	Professional development goals for individuals, including the goal type and items to which it is related.
Profile	All fields on the Individual Profile, for all individuals in the selected school (s)
PD Plan *	PD Plans submitted for approval, their status, the number of reviewers, and the date of submission and reviews.

Report Type	Contents
Recertification Summary	Provides a summary of credit information by recertification category by individual.
Resource Reports	
Resource Summary *	Provides PD administrators and attendees with detail information on how often resources are viewed. The default options include the resource name, resource type, number of views, average rating, number of ratings , date last accessed and number of recommendations.
Resource Engagement Detail *	Lists which users have viewed which resources and includes details like how many times the user viewed the resource, the date the user last accessed the resource, and additional information about the user and resource (such as their job category and the resource type).
Saved Reports	
Go to Saved Reports *	Frequently used reports may be saved under Saved Reports for quick access.

* Reports available to State Administrators

Note: See Manage Credit Exports for information on the credit export reports.

Run a Pre-Formatted PD Report

There are a large variety of pre-formatted reports you can run in Educator Development to learn more about PD usage, PD Plans, and a number of other details about your users in Educator Development.

See the steps:

1. Hover over Educator Development and click **PD Reports** under Tools & Reports.
2. Select any **report type**. To read a more detailed description of the types, see Pre-Formatted Report Types
3. Customize your report. You can make changes to the following criteria:
    - Which institution to run your report on. To include all child institutions for your selection, check the *Include all child institutions in the search* box.
    - Which school type (for instance Summer, Closed Schools, Middle Schools, etc.) Multiple school types can be selected using this drop-down.
    - Which grades were taught.
    - Time period for your report.

- Whether to include only current versus all employees.
- Select columns to include in your report. Default columns are pre-selected.

> **Note:** School type and grades taught may have changed since the activity or resource was administered. This report will use the state of the schools and grades during the time period specified.

4. Click **Run Report** when you have completed defining your selections. Several options exist to work with a pre-formatted report once it has run:
   - Click **Export to Excel** to export the report into a spreadsheet format.
   - Click **Save Report** to save this report for future use, and type in a Report Name for it. Once saved, your report can be found again in Educator Development > PD Reports > Go to Saved Reports. See Run a Previously Saved Report for more information.
   - Click **Show Selections** to reveal the data selections used in the pre-formatted report.
   - Click **Edit Data Selections** to edit the criteria selection you made for your report and re-run it.
   - Edit the **Report Columns** (the ones that by default say Show All) to filter the report. You can type in fields you are searching for, or select from drop-downs, where they exist. Click **Apply Filters** to apply the changes you make to report columns, and **Clear All Filters** to remove them.
   - Use the **Result per Page** option from the bottom of this page to alter the number of rows listed on the report.

Run a Previously Saved Report

When you run and save a report from the Pre-Formatted PD Reports page, it will populate your My Saved Reports list on the same page.

To run a saved report:

1. Hover over Educator Development and click **PD Reports** under Tools & Reports.
2. Click **Go to Saved Reports** (the last link on this list).
3. Optional: Refer to Run a Pre-Formatted PD Report to see options for managing a run report.

Manage Credit Exports

Many states require timely and accurate submission of activity credits earned by certified employees. Districts are able to manage this credit export process in Educator Development.

Note: Only users who are permissoned to submit credit exports will have these options displayed on their screen.

View the Credit Export

1. From the **Educator Development** menu, click **PD Reports**. The **Pre-Formatted PD Reports** page appears.
2. Click on the **View Credit Export** link within the Certification Credits box in the lower left corner. The View Credit Export page appears.

   If you do not see the Certification Credits box then you may not be permissioned to submit credit exports. Please view the Reviewer Settings within your PD Profile or contact your District Administrator.

3. Make selections within the filter as necessary. Click on the **View** button to view the credit export.

   The Filter will default to Current Employees, All Regions, All Schools, and Show Only not exported Credits. The Start Date and End Date will default to the first day of the school year and today's date, respectively.

4. To export credits to Excel, click on the **Export to Excel** button. A spreadsheet will open with the data displayed in a comma delimited format.
5. To mark credits as exported, click on the **Mark as Exported** button. A confirmation message stating that You have successfully marked all records on this table as Exported to the State will appear at the top of the screen.

Note: Only the records that display on your screen will get marked as exported. Once records have been tagged, they will no longer appear when choosing Show Only not exported Credits in the Credit Export Status area within the Filter. Please use caution when marking records as exported because there is no way to un-tag credits.

Change Credit Export Configuration Settings

1. From the **Educator Development** menu, click on **PD Reports**. The **Pre-Formatted PD Reports** page appears.
2. Click on the **View Credit Export** link within the Certification Credits box. The Certification Credits box is located on the left-hand side of the screen underneath the How to Build a Pre-Formatted PD Report box. The View Credit Export page appears.
3. Click on the **Change Configuration Settings** link at the bottom of the Filter. The Configure Credit Export Settings page will appear.

The first time you view this page the defaults will be set to All for Activity Types, Credit Types and Certification Areas. Default Display Options are taken from the Credit Report found within the Pre-Formatted Reports area.

4. To **Open/Close** any section, click on the green "+" to the left of the header name.
5. Edit selections, where necessary, and click on the Save button. The View Credit Export page will appear with a **You have successfully saved the Configuration Settings** message appearing at the top of the screen.

View Credit Export History

Each time a credit export is marked as exported or configuration settings have been changed, a record is kept within the Credit Export History page.

1. From the **Educator Development** menu, click on **PD Reports**. The **Pre-Formatted PD Reports** page appears.
2. Click on the **Credit Export History** link within the Certification Credits box. The Certification Credits box is located on the left-hand side of the screen underneath the How to Build a Pre-Formatted PD Report box. The Credit Export History page appears.
3. The Credit Export History page will display **Type** (either Config or Export), **Date Submitted** (date and time stamp), **Submitted By**, **# Records** (for Export type only) and a **Configuration** link.
4. Each time you export credits (see Viewing the Credit Export) by clicking on the **Mark as Exported** link on the View Credit Export page a record will display on the Credit Export History page with the **Type** labeled as Export.
5. Each time you save the configuration settings (see Viewing the Credit Export) within the **Configure Credit Export Settings** page a record will display on the Credit Export History page with the **Type** labeled as Config.
6. To **View Settings** under the Configuration header:
   a. Click on the **View Settings** link. A **View Settings** pop-up will appear.
   b. The **Filter Settings** are conditional and will only display when you are viewing the settings an **Export**.
   c. To print the View Settings pop-up, click on the **Quick Print** link located on the upper right of the screen.

Note: The Credit History page will keep a record of when actions were performed and by whom. You cannot view the content of past credit exports. It is recommended that you save your credit exports within Excel each time you Mark as Exported within the system.

6: Glossary

A

activity

A professional development event. Activities consist of sections and sessions where teachers attend and participate either in-person or online. Activity participation is tracked at the individual, school, and district level.

activity proposal

This refers to when an individual submits a proposal to offer an activity in the catalog for other individuals to take.

Advanced Analysis

An extention available for School & District Data that offers additional reports combining assessment, enrollment, demographic, attendance, and discipline data. It uses the OLAP Report structure.

Assessment Admin

Used for all test creation, scheduling and administration on the site. It enables districts to centralize and automate the management, scheduling, and data collection for tests.

C

caseload

A grouping of educators that an observer or school leader is able and expected to evaluate. Various caseload reports and management systems are available in Educator Development, such as Caseload Manager for Observations and Student Learning Objectives for SLOs.

Classrooms

Delivers student performance data, academic standards and curricular materials to the teacher's desktop. It also enables district curriculum staff to develop and dissiminate standards, curricular materials, and best practices to teachers throughout the district. Finally, it provides district staff and teachers with tools to plan and analyze instructional practices based on student performance.

E

EDS

Educator Development Suite, which consists of everything in Educator Development including PD Planner (PD Search and professional development programs) and multiple measures (Observations, Professionalism, Professional Growth Plans, and Self-Reflections).

educator evaluations

The various measure types for which teachers and other educators can view reports in Educator Development. Examples of educator evaluations are Observations, Student Perception Results, and Professional Growth Plans. Your system can have any subset of these types, and they can be labelled differently in your site.

eligibility criteria

Parameters that individuals must meet, e.g., School, Certification, Job Title, in order to register for an activity.

F

facilitator

A district administrator, school administrator, or individual who is designated to facilitate activities.

H

home page

The dashboard most users of the system see first when they log in. It can also be accessed throughout the system by clicking the schoolhouse icon in the left corner of any page. Some users may know this as My Schoolnet.

I

IIS

Instructional Improvement System, which consists of IMS (Instructional Management System), EDS (Educator Development System), and Dashboard (sometimes known as Home Page or My Schoolnet).

IMS

Instructional Management System, or IMS, comprises of Assessment Admin, Classrooms, Interventions, Outreach, and School & District Data.

initiative

A strategy set up by a district to improve professional development. In Educator Development, this consists of taking PD activities and resources within a designated timeframe and receiving appropriate credit. Initiatives also have a secondary usage for districts, to create groups of users for their own reference, to find in reports, and to recommend PD for.

institution

Institution refers to a school, region, district, or state.

Interventions

Provides additional services for students that have been identified as struggling academically or behaviorally.

M

mentor

Someone assigned to advise another individual at their institution. Mentors are assigned by their school administrator and are responsible for logging interactions with their mentees.

mentor interaction

An interaction between a mentor and their mentee, logged by the mentor. Types of mentor interactions are observations, pre- or post-observation meetings, group meetings, or “other.”

Multiple Measures Summary

May be labelled differently in your system. This tool collects and presents ratings across educator evaluations for the entire year or portions of a year. In addition to compiling the ratings from these evaluations, school leadership may also give scores and comments for these evaluations or groups of evaluations in Multiple Measures Summaries.

O

Observation

Note that "Observation" may be labeled differently on your site. This tool allows one user to score and/or enter comments for individual elements in a teacher effectiveness framework.

operation

Operations are used to assign special site capabilities, such as editing page content or moderating forums. They are assigned to Roles.

Outreach

The page most users see before they log in, and a content management system for your school, district, or state. It may have features enabled such as forums, calendars, and announcements before an educator logs into the system.

P

PD Goal

A goal set by an individual related to a standard or a content area. Goals are set and updated on the My Goals section of the individual's PD Plan.

PD Plan

An individual's summary of PD goals, activity participation, and mentor interactions. If the individual is a facilitator, their Facilitation Log can be accessed through the PD Summary section of their PD Plan.

PD Planner

One of two parts of the Educator Development module, PD Planner helps manage PD activities, view resources, register for and attend activities, award credit and recertification, and other professional development-related tasks.

PD Profile

An overview of an educator's professional development consisting of recommended PD, a listing of PD taken, PD forms needing completion, teaching certificates, initiatives, contact information and work history, and professional development plan information. For administrators, there are also additional listings for activities being facilitated, activity proposal reviewer settings, and possibly a listing of PD Profiles for all educators in a school, district, or state.

PD Report

A pre-formatted report specifically for viewing information about Educator Development, such as usage of PD activities and resources and mentor interaction statuses.

PD Search

Feature that launches a catalog of activities and resources available for you to take in Educator Development. The PD Search bar or page is available in various places on the site and indexes PD by availability, date, rating, job category, and other variables.

permissions

User permissions encompass the assignment of institutions, roles, and operations to users that control their level of access in the system.

PGP Goal

A key component of professional growth plans where school leadership selects a standard for teachers in their school(s) to align to, and teachers select up to five standards aligned to their principal's standard as well as their own. PD Goals can be supported by comments by teachers, artifacts, and evaluation results such as observations and student perceptions that have scored on the same standards.

pre-registration approval

Permission from the school and/or district administrator to register for an activity.

prerequisite

In Educator Development, an activity that an individual must complete in order to register for another activity.

Professional Growth Plan

Also known as a PGP, this is a tool for educator improvement consisting of goals that school leadership selects and teachers align to and display evidence towards.

Professionalism

Note that "Professionalism" may be labeled differently on your site. This tool allows teachers and their leadership to provide feedback on a teacher's offstage performance, such as how teachers interact with peers and and parents, and any other out-of-classroom practices.

R

resource

A professional development item that may be found in PD Search, should your district load resources into the system. Unlike activities, resources are unscheduled and can be used by teachers at any time. Examples of resources include videos, documents, and URLs, such as Professional Learning Networks or links to other websites.

role

Roles are how the system defines groups of individuals with similar site needs. Users must belong to at least one system role (e.g., Teacher, Staff) and may belong to additional roles in any institution. Access to features in the system is partially controlled by role, as well as operation and other institution-specific configurations.

roster verification

A tool used by teachers, clerks, and administrators to verify student rosters. Student perceptions, student growth, student learning objectives, and other student performance based data in the system may help determine teacher tenure and pay, so it is crucial rosters include only students teachers are currently teaching.

S

School & District Data

A data-driven school improvement support system that provides districts with a framework to evaluate performance, efficiently plan improvement, and monitor progress toward accountability targets. It enables leadership to define and apply a district-wide accountability model by monitoring KPIs, measuring district progress, making comparisons across institutions, and identifying potential problem areas.

School Leadership Evaluation

This may be labeled differently on your site. This tool allows school leadership (principals, assistant principals, and anyone else who may be marked as leadership in the system) to have their own evaluations that they can self-review and receive feedback on by their leadership (such as district administrators).

section

A section must be created in order for an activity to appear PD Search and be registered for. Every participant registers for one section. A section consists of one or more sessions, possibly with multiple dates and locations.

Sections & Rosters

A tab found in My Account that educators can use to access Roster Verification features.

Self-Reflection

Note that "Self-Reflection" may be labeled differently on your site. This tool allows teachers to assess themselves at the beginning of the year to guage how they think they stand on the whole teaching framework.

SIS

Student Information System, a database system which houses information related to students, teachers, courses, etc.

standard

Refers to a set of skills students or educators must learn to be considered proficient in a given course of study. The term may refer to a granular level of a standard, such as a skill, indicator, or performance objective. Standards exist at national, state, and local (district or school) levels.

Student Growth

Note that "Student Growth" may be labeled differently on your site. This is a measure of how much each teacher has affected the academic improvement of their students.

Student Learning Objectives

Also known as SLOs, though this may be labelled different in your system. One of the multiple measures in Educator Development, SLOs measure how well educators have affected their students' growth over various subjects that don't have state assessments (non-ELA or math subjects like history or art, for example).

Student Perception

Note that "Student Perception" may be labeled differently on your site. This tool allows aggregated scores for categories from Student Perception Survey results to be imported and presented to teachers and leaders at school, district and state levels.

System

A link to pages that system operators use to configure the site. Corresponding System Operator Guides are only available to system operators on PowerSource and the Help and Support Library.

U

User Management

A tool that allows you to manage user accounts, roles, and operations. You must be permissioned to be a user manager in your state or district in order for the User Management link to appear on your site.

W

waitlist

A list of individuals waiting to register for an activity that has already reached the maximum number of attendees.

walk-in

An individual who attends an activity session without registering for it ahead of time. Activity facilitators add walk-in attendees on the sign-in sheet for session attendance.

web part

A widget that you may modify the appearance or position of. These are found on My Schoolnet (also known as home page), and some module's dashboards such as Assessment Admin and Educator Development. Examples of web parts include My Calendar, District Announcements, Recommended PD, and Recent Assessments.