



LEA Monitoring User Guide

v. 3.0 September 2012

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Introduction

Acknowledgements

WestEd Tracker™ was developed by WestEd through the Southwest Comprehensive Center (SWCC) and the California Comprehensive Center (CACC) in collaboration with:

- Arizona Department of Education
- California Department of Education
- Colorado Department of Education
- Nevada Department of Education
- New Mexico Public Education Department
- Utah State Office of Education

Questions

Refer to the Help page (after logging in) or the Login page for information on who to contact if you have questions about using Tracker. For additional details on the Help page, see the Getting Help section in this user guide.

What is WestEd Tracker?

WestEd Tracker is a web-based tool designed to streamline Federal and State program monitoring and track the implementation and evaluate the effectiveness of LEA Improvement Plans. Tracker provides a consolidated tool for coordinating, managing and streamlining these two activities.

Monitoring

The Monitoring module of Tracker helps streamline the process for program monitoring and other types of LEA monitoring. The online system presents you with the appropriate group of monitored items, and allows you to respond to those items by uploading evidentiary documents.

End User System Guidelines

Tracker runs on Mac or PC platforms. It requires an active Internet connection, and either Internet Explorer v.7.0 or above, or Firefox v.2.0 or above web browsers. Other browsers and tablet devices will likely work, but we do not guarantee support for them. The system itself does not require available local disk space, but it is advisable to have space on your computer when viewing documents stored on the system.

Document scanners or other imaging devices are useful when creating electronic versions of printed documents, but they are not required.

User names and system notifications require a valid e-mail address for each user. Please note that e-mail servers for schools, school LEAs and county offices may have security settings that block messages from Tracker. If users are not receiving Tracker invitations and messages, WestEd can work with your IT department to ensure that messages can be delivered.

Accessing Tracker

Enter your e-mail address and password to enter the site. If you have forgotten your password, use the password recovery tool on the Logon screen by clicking **Reset Password**.

WestEd Tracker LEA Monitoring User Guide

LOG ON

Welcome to PMT. Please log in to use the system.
Fields marked with a * are required.

Email Address:

Password:

[Reset Password](#)

[First-time user? Accept Invitation](#)

Enter your e-mail address on the next screen and click **Send Invitation Now** to receive a new login invitation via e-mail that will allow you to create a new password and login.

Getting Help

Access the Help page by clicking the **Help** link at the top right corner of any screen.



The Help page contains documents and links provided by the SEA to help assist in using the system or working with specific content areas.

HELP

The SEA has provided the Resources below to assist you.

1

Page size: 25

1 to 7 of 7 items

Document/Link Title	Category	Description	Type	Download
3.0 User guide for LEAs	User Guides		.doc	Download
301 Plan Rubric	Annual Submissions		.pdf	Download
Reading Curriculum Map	Reading/Language Arts Proficiency	Instructions for creating a Reading Curriculum Map, and sample map.	.doc	Download
State Resources for 301 Plans	Annual Submissions	State Resources for 301 Plans	link	Go to URL
Strategies	LEA Plan	Suggested Strategies by Goal Topic	.doc	Download
Testing Adding a Document to Help Page	English Learners	How Next-Generation Standards and Assessments Can Foster Success for California's English Learners Robert Linquanti, WestEd Kenji Hakuta, Stanford University	.pdf	Download
v2 Title III Examples for ALEAT Impr. Plan Goals	Title III	UPDATED: This is a document for Proficiency in English for ELLs goal. This contains an explanation of a SMART Goal, the process steps for completing a goal, examples of SMART Goals, strategies, and...	.doc	Download

1

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1 to 7 of 7 items

For more information, please contact the Help Desk at help@pmt.wested.org.

You may sort the list by Category to find the type of resource you need. Click the **Download** link to download any file and click the **Go to URL** link to view the web link resource.

Navigation and Home Page

If you have access to a single LEA, you will go directly to the LEA Overview when you login. If you have access to more than one LEA, your default home page will be the LEA List. The default view is of active LEAs in alphabetical order. To view retired LEAs, change the Active filter to Retired. Use the County, Instrument assignment, or Goal Template assignment to filter the list. Type part of the LEA name into the search box to locate a specific LEA or use the page navigation to locate the LEA you wish to view.

LEAs List

Setup & Maintenance

[Home](#) > [LEA List](#)

LEAS

Select School Year:
 2012 - 2013 School Year

FILTERS
Location:

Any Region

Any County

Goal Templates:

Any Template

Instruments:

Any Instrument

LEA Name:

Active

 Filter by Custom Fields Information

Custom Field 1

Custom Field 2

Custom Field 3

Select Custom field

Select Custom field

Select Custom field

LEAS (74)

1

2

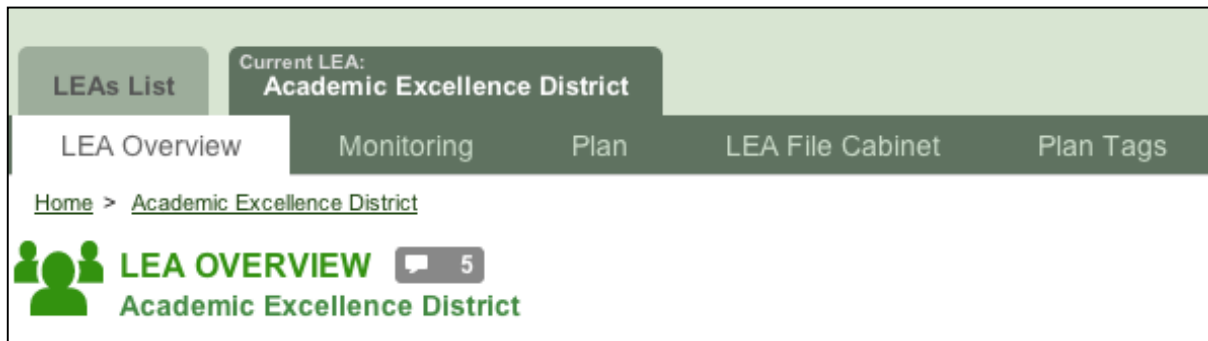
3

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LEA	REGION	COUNTY	INSTRUMENTS MONITORED	LEA PLAN GOALS	SCHOOL PLANS
Academic Excellence District - 12345678	CAIS	Test County - I-DE7	2	0	0
Academy Charter - 10623640118661	Region 07	Fresno - 10	2	1	0
Alameda County Training District	CAIS	Test County - I-DE7	2	0	0
Alpine County Training District	CAIS	Test County -	0	0	0

Select an LEA name to view the LEA Overview. You may return to the LEA List by clicking the tab in the top left corner.



LEA Overview

The LEA Overview page displays a status of the Monitoring and Plan activities for the LEA.

This screenshot displays the full LEA Overview page for Academic Excellence District. The page includes a top header with the WestEd logo, 'WestEd's Planning and Monitoring Tracker', and user information 'Hi Lillian! Logout Help'. Below this is a navigation bar with 'LEA Overview' (selected), 'Monitoring', 'Plan', 'LEA File Cabinet', and 'Plan Tags'. A 'Current LEA: Academic Excellence District' dropdown and a 'Setup & Maintenance' button are also present. The main content area features a 'LEA OVERVIEW Academic Excellence District' header with a comment icon and '5'. Below this are tabs for 'Monitoring (13)' (selected), 'LEA Plan Goals (9)', and 'School Plans (5)'. On the right, there is a 'Select School Year:' dropdown set to '2011 - 2012 School Year' with an 'Update' button. The central table, titled 'Monitoring Instruments', lists 13 items with columns for Name, Status, Items not in Compliance, and Due Date. To the right of the table are two summary boxes: 'LEA INFORMATION' and 'ONSITES'.

Name	Status	Items not in Compliance	Due Date
2010-2011 instrument (10-11)	In Progress	0	06/29/2012
Annual Submissions	Submitted	0	12/23/2011
Cycle 2	Received	0	12/01/2011
English Learners (EL)	Needs Further Action	6	12/23/2011
LEA Program Improvement (PI) Year 1 Plan Addendum	Submitted	0	12/19/2011
New instrument (NI)	Submitted	1	03/15/2012
NPS/A Application	Received	0	12/16/2011
NPS/A Staff Update	Needs Further Action	1	
NPS/A Staff Update #2	In Progress	0	
SIG Implementation (SIG)	Submitted	0	12/01/2012
State Fiscal Stabilization Fund (SFSF)	Accepted	0	04/30/2012
Title I, Part A (CE)	In Progress	0	02/21/2013
Title III Y2 and Y4 Plan Evaluation Checklist	Received	0	04/30/2012

LEA INFORMATION

Migrant Region	IV
Title I Status	PI Year 1
SIG Schools	2
Cycle	B

ONSITES


Annual onsite visit	09/24/2012 - 09/26/2012
Annual onsite visit 12-13	09/24/2012 - 09/26/2012
Title I review	09/04/2012 - 09/19/2012
SEA Findings	

The **Monitoring Instruments** tab of the LEA Overview displays a list of the currently selected year's assigned instruments, their status, number of outstanding items, and the instrument due date. To view previous years' assignments, change the School Year option on the right side of the screen.

The **LEA Plan Goals** tab displays a list of active goals in the LEA Plan and the last update information. If plan reviews are used, the current status of the goal is displayed.

Monitoring (12)
LEA Plan Goals (9)
School Plans (5)

Go To Plan Overview

Action Steps: 55


Status:

- Completed (10)
- Not Begun (34)
- In Progress (10)
- Suspended (1)

1
Page size: 25
1 to 9 of 9 items

Title	Strategies/ Action Steps	Status	Last Updated
Reading/Language Arts Proficiency	4/5	Accepted	Libby Rognier 04/27/2010
Mathematics Proficiency	2/7	Accepted	Libby Rognier 02/24/2011
Proficiency in English for ELLs	3/18	Accepted	Lisa Hamilton 08/25/2011
Parent and Community Participation	1/2	Submitted	Don District 06/09/2011

The **School Plans** tab displays a list of schools in the LEA with a school plan and the last update information for the plan. Click the name of the school to view the school plan.

Monitoring (12)
LEA Plan Goals (9)
School Plans (5)

Show 2 Retired

1
Page size: 25
1 to 5 of 5 items

Title ▲	Goals/Strategies/ Action Steps	School Status	SIG School	Last Updated
Basics Elementary School - S11111	2/1/3	Elementary	Yes	Erin Carter 08/09/2012 3:17 PM
Curiosity Elementary School - S22222	1/1/0	Elementary		School Dude 07/25/2012 2:12 PM
Excellence Elementary School - S33333	4/4/5	Elementary		Libby Rognier 08/06/2012 9:35 AM
Learners Middle School - S44444	3/2/1	Middle	Yes	Schoolio Specialist 08/18/2012 9:27 AM
Marvelous Middle School - S55555	6/1/1	Middle		David Bogdonoff (WestEd) 06/20/2012 9:10 AM

1
Page size: 25
1 to 5 of 5 items
























If the SEA is displaying information about the LEA, this is listed on the right side of the LEA Overview, as well as any published onsite for the LEA that year. Click the name of the onsite to view details.

LEA INFORMATION	
Migrant Region	IV
Title I Status	PI Year 1
SIG Schools	2
Cycle	B

ONSITES	
Annual onsite visit	09/24/2012 - 09/26/2012
Annual onsite visit 12-13	09/24/2012 - 09/26/2012
Title I review	09/04/2012 - 09/19/2012
SEA Findings	

Onsites

The Onsites section is a place where the SEA and the LEA can coordinate important information about monitoring onsite visits. If the SEA has assigned an onsite visit for the current year, this will be displayed on the LEA Overview screen. Click the onsite name to view the record. All information is displayed on the onsite record screen.

ONSITE  			
Academic Excellence District			
Title	Date		
Annual onsite visit	09/24/2012 - 09/26/2012		
Description			
Onsite visit to the district to review annual instruments and SIG planning activities. Misc. staff.			
ONSITE TEAM LEADER Jeff Burroughs		LEA ONSITE COORDINATOR Lily Bart	LEA ONSITE CONTACTS  Not Assigned Jane Austen in administration will coordinate site visits.
INSTRUMENTS (2)			
  1   Page size: 25 1 to 2 of 2 items			
Instruments	Status	Reviewers	LEA Submitters
Annual Submissions	Submitted	Erin Carter	 Lily Bart
SIG Implementation	Submitted	Erin Carter	 Lily Bart
  1   Page size: 25 1 to 2 of 2 items			
SCHOOLS (2)			
  1   Page size: 25 1 to 2 of 2 items			
School	Date	Instruments	Notes
 Basics Elementary School - S11111 - S11111	10/18/2011-10/18/2011	SIG Implementation Technology Plan	Tara Johnson will meet you in the school admin office to coordinate.
 Learners Middle School - S44444 - S44444	10/19/2011-10/19/2011	Cycle 5 Technology Plan	
  1   Page size: 25 1 to 2 of 2 items			

The onsite title, dates of the visit and description provided by the SEA appear at the top. The SEA's onsite Team Leader and the LEA's Coordinator are shown, assigned by SEA users.

Additional LEA Onsite contacts may also be added or modified by LEA Admins by clicking the pencil icon next to the LEA Onsite Contacts section. Select any available LEA users to add to the Onsite Contacts list by selecting their name(s) on the left side of the screen and clicking the **Assign** button. Remove contacts from the Assigned list on the right by selecting their name(s) and clicking the **Remove** button. You may provide an optional note about these contacts in the Notes box. Click **Save** to save changes.

ONSITE

Schedule Onsite

Choose Instruments

Assign People

Choose Schools

Title
Annual onsite visit

Date
09/24/2012 - 09/26/2012

Description
Onsite visit to the district to review annual instruments and SIG planning activities. Misc. staff.

LEA ONSITE CONTACTS
Choose users for this role. You may also invite a new user or enter contact information manually.

Available (14)

User Name - Organization

☐ Lily Bart - Academic Excellence District

☐ David Bogdonoff - Phoenix Elementary District - 070401000

☐ Lillian Cat - Academic Excellence District

☐ Andrew Davidson - Sample Improvement Plan for a mock improvement LEA., Academic Excellence District

☐ Don Draper - Academic Excellence District

☐ Isabelle Improvement - Academic Excellence District

☐ Michael Kemper (LEA) - Academic Excellence District

☐ Lisa Lea - Academic Excellence District

Assign >>

<< Remove

Assigned (1)

User Name - Organization

☐ Don District - Academic Excellence District

Notes
Jane Austen in administration will coordinate site visits.

Save

Cancel

Below the roles on the Onsite screen is the list of monitoring instruments that will be reviewed as part of the onsite visit. The Reviewer(s) and Submitter(s) for each instrument are cross-referenced with the current assignments on the Monitoring tab. LEA Admins may modify the Submitters here if needed.

WestEd Tracker LEA Monitoring User Guide

ONSITE

Academic Excellence District

Title	Date		
Annual onsite visit	09/24/2012 - 09/26/2012		
Description	Onsite visit to the district to review annual instruments and SIG planning activities. Misc. staff.		
	ONSITE TEAM LEADER Jeff Burroughs	LEA ONSITE COORDINATOR Lily Bart	LEA ONSITE CONTACTS Don District Jane Austen in administration will coordinate site visits.

INSTRUMENTS (2)

Page size: 25 1 to 2 of 2 items			
Instruments	Status	Reviewers	LEA Submitters
Annual Submissions	Submitted	Erin Carter	Lily Bart
SIG Implementation	Submitted	Erin Carter	Lily Bart
Page size: 25 1 to 2 of 2 items			

The schools that are being visited as part of the onsite visit are shown at the bottom of the page.

SCHOOLS (2)			
Page size: 25 1 to 2 of 2 items			
School	Date	Instruments	Notes
Basics Elementary School - S11111 - S11111	10/18/2011-10/18/2011	SIG Implementation Technology Plan	Tara Johnson will meet you in the school admin office to coordinate.
Learners Middle School - S44444 - S44444	10/19/2011-10/19/2011	Cycle 5 Technology Plan	
Page size: 25 1 to 2 of 2 items			

LEA Admin users may click the pencil icon next to any school to add or modify school visit contacts.

Search for existing contacts who are users by typing in part of the individual's name. When you find a match, select the user by checking the name and then click the **Add Contacts** button to add the user(s) to the list of school contacts. You may provide additional notes about the school contacts or school visit. Click **Save** when complete.

ONSITE

Schedule Onsite

Choose Instruments

Assign People

Choose Schools

Title

Demo District SIG Review

Date

08/20/2012 - 08/24/2012

Description

Visit to confirm progress for SIG schools

Choose schools to be reviewed. For each school, specify the planned dates for visits (if applicable) and instruments to be monitored. You can edit this at any time.

School:

Dodger High School - 0987654321

Dates:

08/21/2012-08/21/2012

Instruments

- Title I, Part A: Compensatory Education

Contacts

jackie

Search

☒ Jackie Robinson - Dodger High School

Add Contacts

Notes

Use this field to list any contacts who are not in the system, or record notes about the review.

Save

Cancel

School Years

Tracker relies on school years to organize and filter information, including monitoring instruments, documents, plan budgets and other key information. On all applicable screens, the School Year menu allows you to change the current view from one year to another. When any year other than the current year is selected, the choice is prominently displayed in the page headers.

To change the default year, select a school year from the drop-down list at the top right of the LEA Overview and click **Update**. You will see the non-default school year at the top of the screen to indicate that you are looking at a year other than the current year.

Commenting

Comments facilitate communication among Tracker users. Regardless of e-mail notification, any user with access to the associated element may view comments. Throughout the system, the comment icon indicates that commenting is available at that element. If comments have been entered for that element, you will see a number within the comment icon, representing

the number of comments:



The following elements of the LEA view feature comments:

- The LEA Overview (comments at the LEA level)
- Onsite page (comments about the onsite visit)
- Monitoring Instrument Overview (comments at the Instrument level)
- Monitoring Item page (comments at the item/indicator level)
- Plan Overview page (comments about the plan)
- Plan Goals (comments at the goal level of the plan)
- Plan Strategies (comments at the strategy level of the plan)
- Plan Action Steps (comments at the action step level of the plan)
- Plan Tasks (comments at the task level of the plan)

View Comments

Click the comment button to view all comments in the area or add a comment. Comments are listed for the element in reverse chronological order, with the most recent at the top. Click the **View** link to the right of any comment to view its full content.

COMMENTS			
+ Add Comment			
<div> <div> <div>1</div> <div>Page size: 25</div> </div> <div>1 to 5 of 5 items</div> </div>			
Posted By	When	Comment	
Venisa Sin	1/18/2012 3:10:59 PM	Venisa Sin - SEA has posted the following comment in PMT: test	View
Venisa Sin	1/18/2012 2:39:06 PM	Venisa Sin - SEA has posted the following comment in PMT: testing comment	View
Erin Carter	2/22/2011 2:15:46 PM	Hi Sam!	View
Erin Carter	2/22/2011 2:14:57 PM	Here is a comment	View
Erin Carter	2/17/2011 1:16:20 PM	Post comment	View
<div> <div>1</div> <div>Page size: 25</div> </div> <div>1 to 5 of 5 items</div>			

The view comment page shows all details and includes options for paging through other comments for the element or returning to the full list.

COMMENT DETAILS

Older1 of 5Newer

Posted by:
Venisa Sin

On:
1/18/2012 3:10:59 PM

Emailed to:
Venisa Sin

Comment:
Venisa Sin - SEA has posted the following comment in PMT:

test

[View All Comments](#)

Add Comment

If no comments exist yet for the selected element, the comment button will take you directly to the Add new Comment screen. If comments exist, click the **Add Comment** link at the top of the list of existing comments to add a new one to that element. Add the text of the comment. Click **Post** to add the comment to the system.

Comment:

Comments are seen by all users with access to this element.

Email a copy to:

☒ Erin Carter - SEA

☒ State User - SEA

☒ Lily Bart - Demo District

☒ Mary LEA - Cycle C Demo

ADD RECIPIENTS

A link to the comments page is included in the e-mail.

E-mail option

Comments may optionally send an e-mail notification to selected users. The **Add Recipients** section below the Comment entry field allows you to add individuals who will also receive a notification of the comment being added. This may be used to supplement the comment addition, especially if you want certain individuals to be made aware of the new comment. For comments made for an Instrument or Item, designated Team Leaders, Reviewers and Submitters will be listed. Uncheck names if you do not want them to be notified. To search for

other users to notify, enter any part of the user's first or last name and click **Search**. Users can be other users at the school or LEA or any known individuals at the SEA.

Check the box next to the names you want to add to the notification list. Click **Add recipients** to add these users to the list. The names will then appear above the Add Recipients search to indicate they have been added. Click **Post** to add the comment and deliver the e-mail(s).

The screenshot shows a yellow-bordered box containing the 'Add Recipients' interface. At the top, it says 'Email a copy to:' followed by four checked checkboxes: 'Erin Carter - SEA', 'State User - SEA', 'Lily Bart - Demo District', and 'Mary LEA - Cycle C Demo'. Below this is the section header 'ADD RECIPIENTS' in green. Underneath is a search bar with the text 'Test' and a 'Search' button. Below the search bar are three unchecked checkboxes: 'Test Guy - Chavez Ravine Elementary School, Jackie Robinson Middle School', 'Test School - Chavez Ravine Elementary School, Jackie Robinson Middle School', and 'Test test - Steve Sax High'. At the bottom of the box is an 'Add recipients' button.

Monitoring Review

The monitoring process is based on monitoring instruments and items. The instrument is an organizing structure that allows the SEA to collect items that share due dates and reviewers, and present them to specific LEAs for response. The LEA addresses the items in an instrument based on instructions and guidance provided by the SEA, and submits it to the SEA for review. Items that do not meet requirements are handled through findings reports and corrective responses until the items are satisfied. Instruments and their items are intrinsically assigned to a school year. The LEA and SEA are able to view past years' responses as needed, and continue to work on previous year's instruments with outstanding items, as needed.

The LEA Self-Review

The initial LEA response to an instrument is comprised of an upload of evidentiary documents and an optional or required self-review. The LEA self-review status can be used by the LEA to organize their response and may be used by the SEA to assist in refining confusing item requirements or descriptions. It is non-authoritative and does not determine the final compliance status for an item.

Compliance Status

The **Compliance Status** identifies the state of an item for LEA self-reviews and SEA reviews. Changes to this status are recorded by the system and include the new status, the individual making the change, the date and time, and a comment.

Depending on SEA rules and the submission status of the instrument, changes to compliance status may trigger system notifications.

Compliance Status values are:

- **In Progress:** indicating that the reviewer is working on the item. This is the default value for an item.
- **Meets Requirements:** indicating that the reviewer believes the evidence provided or available for review is sufficient to address the item
- **Does Not Meet Requirements:** indicating that the reviewer believes the evidence is not sufficient to address the item.
- **Not Monitored:** indicating that the item is not addressed during this monitoring cycle.

Monitoring Overview

Select the **Monitoring** tab. The LEA Monitoring screen contains two views: Instruments and Items. The Instruments tab displays all assigned instruments for the selected LEA in the year being viewed and summary information about each instrument. The name of the instrument will appear as a link to navigate to the individual Instrument Overview screens for each instrument. Team Leaders, Reviewers and Submitters for each instrument will also be displayed and can be adjusted from this screen by users with access.

A summary view of the total number of items and total number of non-compliant items in each instrument will also appear. If the instrument has a status of Needs Further Action or Accepted, it is the SEA statuses displayed in this column. If the instrument has a status of In Progress, Submitted, or Received, it is the LEA self-review statuses displayed in this column.

Current LEA: Academic Excellence District							Setup & Maintenance
LEA Overview							Monitoring
Plan							LEA File Cabinet
Plan Tags							
Home > Academic Excellence District > Instruments							
MONITORING							
Instruments (13)							View SEA Findings
<div> <div>1</div> <div>Page size: 25</div> <div>1 to 13 of 13 items</div> </div>							
Instruments ▲	Status	Last Updated	Team Leader	Submitters	Reviewers	Total / Noncompliant	
2010-2011 instrument (10-11)	In Progress	04/24/2012	Not Assigned	Not Assigned	Libby Rognier	1 / 0	
Annual Submissions	Submitted	09/07/2011	Not Assigned	Lily Bart	Erin Carter	5 / 0	
Cycle 2	Received	09/16/2012	Not Assigned	Lily Bart	Erin Carter Tee Lambert	35 / 0	
English Learners (EL)	Needs Further Action	11/01/2011	Not Assigned	Lily Bart Andrew Davidson	Erin Carter Libby Rognier	22 / 6	

The Items tab contains a list of all monitoring items assigned to the LEA. You may filter by associated Program and/or by item status.

MONITORING

Instruments (4) Items (6) [View SEA Findings](#) [Export](#) [Print](#)

FILTERS

Program:

Status:

[Update](#) [Reset](#)

Page size: 25 1 to 6 of 6 items

Item	Instrument	Status	Due Date	Last Updated
1: Single item	Short Instrument	⚠ Does Not Meet Requirements	06/07/2012	05/31/2012
II-HIV 02: Notification in Parents' Languages	Compensatory Education	Meets Requirements		05/30/2012
Item 1	Compensatory Education	Not Monitored		05/30/2012
One item	A second EL instrument	In Progress		08/13/2012
V-HIV 03: Training for Staff	Compensatory Education	Not Monitored		05/30/2012
VII-HIV 05: Instruction and Materials	Compensatory Education	Meets Requirements		05/30/2012

Click the item title to view the item response page. Click the instrument title to view the Instrument Overview.

Assigning Instrument Submitters (LEA Administrators only)

Each LEA will have designations for their Reviewers and Submitters for each instrument that is assigned.

SEA users assign the appropriate Team Leader (SEA) to a LEA's onsite to indicate who at the SEA is assigned for that LEA as the primary contact for onsite-related questions and issues.

SEA users assign the appropriate Reviewer(s) to each individual instrument from a list of users on the system. Reviewers are those users that have access to edit and finalize the SEA review of an instrument. Some states allow both SEA and LEA-level users to be assigned as Reviewers. There may be multiple users assigned as the Reviewer for each instrument.

LEA Administrative users assign Submitter(s) to designate who at the LEA has access to submit a completed instrument for review. There may be multiple users assigned as the Submitter for each instrument.

Each instrument assigned to the LEA will be displayed on the Monitoring tab's Instruments list, with individual Team Leaders, Reviewers and Submitters designated. The name of the currently assigned individuals will appear under the appropriate column. If no one has been assigned to a role for an instrument, "Not Assigned" will appear. Select the edit icon to either edit existing assignments or add new individuals for the Submitter role. (Users without administrative access will not see the edit icon on this page.)

MONITORING

Instruments (13) Items

Page size: 25

Instruments ▲	Status	Last Updated	Team Leader	Submitters
2010-2011 instrument (10-11)	In Progress	04/24/2012	Not Assigned	Not Assigned
Annual Submissions	Submitted	09/07/2011	Not Assigned	Lily Bart
Cycle 2	Received	09/16/2012	Not Assigned	Lily Bart

On the Assign Submitter page, any currently assigned LEA users are listed on the Assigned tab. You may remove the user by selecting their name and clicking the **Remove** button.

ASSIGN SUBMITTERS

Assigned Unassigned

Remove

Page size: 25 1 to 1 of 1 items

Remove	Last Name ▲	First Name	Email	Organization
<input checked="" type="checkbox"/>	Bart	Lily	ecarter+lily@wested.org	Academic Excellence District

Remove

Page size: 25 1 to 1 of 1 items

To assign new Submitters, select the Unassigned tab on the Assign Submitters page.

Use the Search to locate a specific user, if needed. Select the name of the user(s) to assign as the Submitter for the instrument and click the **Assign** button.

ASSIGN SUBMITTERS

Assigned Unassigned

FIND

Search

Assign

Page size: 25 1 to 14 of 14 items

Select	Last Name ▲	First Name	Email	Organization
<input type="checkbox"/>	Bogdonoff	David	dbogdon+Phoenix@wested.org	Phoenix Elementary District - 070401000
<input checked="" type="checkbox"/>	Cat	Lillian	ecarter+cat@wested.org	Academic Excellence District
<input type="checkbox"/>	Davidson	Andrew	adavids+AZtest@wested.org	Sample Improvement Plan for a mock improvement LEA., Academic Excellence District
<input checked="" type="checkbox"/>	District	Don	lrogner+don@wested.org	Academic Excellence District

Submitters may also be assigned from the Instrument Overview screen or from an Onsite record that contains that instrument.

Instrument Overview

Clicking the name of the instrument on the LEA Overview screen, the Monitoring Overview screen, or the Onsite screen accesses the Instrument Overview screen.

Current LEA: Academic Excellence District

LEA Overview | Monitoring | Plan | LEA File Cabinet | Plan Tags

Home > Academic Excellence District > Title I, Part A

INSTRUMENT OVERVIEW

Academic Excellence District

Title I, Part A (CE) [icon] + [icon] 13

Status: In Progress Due Date: 02/21/2013 Last Update: Administrator Administrator 9/7/2011 10:26:49 AM Items: 37	Does not meet requirements: (0) Meets requirements: (0) In progress: (37) Not Monitored: (0)	Resolved: (0) Withdrawn: (0) Resubmitted for Review: (0) Extension Requested: (0)
--	---	--

TITLE I REVIEW
 09/04/2012 - 09/19/2012
 Marvelous Middle School - S55555

Team Leader: Not Assigned	LEA Submitters: Edit Not Assigned	SEA Reviewers: Erin Carter , Libby Rognier
-------------------------------------	---	--

Items (37) | Criteria Questions (0) | Documents (13) | Status History (1) | [Print Instrument Report](#)

+

CATEGORY: I. Involvement

+

CATEGORY: II. Governance and Administration

The Instrument Overview screen shows the current status of the instrument and its items.

All users may view instrument status at all times. Instrument status values include:

- **In Progress** – This is the initial state of the instrument for the LEA and indicates that the LEA is still working on the instrument. For LEA users, the LEA item status is displayed. For SEA users, the SEA item status is displayed.
- **Submitted** –indicates that the LEA has submitted the instrument but the SEA has not yet reviewed it. For LEA users, the LEA item status is displayed. For SEA users, the SEA item status is displayed.
- **Received**—indicates that SEA has opened the submitted instrument. For LEA users, the LEA item status is displayed. For SEA users, the SEA item status is displayed.
- **Accepted**—indicates that SEA has marked the instrument as complete after reviewing the instrument. For all users, the SEA item status is displayed.
- **Needs Further Action**—indicates that SEA has marked the instrument as Needs Further Action by the LEA before being accepted. For all users, the SEA item status is displayed.

The due date for the instrument will appear as well as the last date the instrument was updated.

If the instrument is part of an onsite review, information about the onsite review is listed on the top right side of the Instrument Overview screen. Any school sites that are being reviewed for that instrument will appear with their review date(s).

TITLE I REVIEW

09/04/2012 - 09/19/2012

Marvelous Middle School -

S55555

You may print an **Instrument Report** by clicking the link at the top right of the screen. The report contains information about the instrument—including the content of the item indicators, the evidence guidance, and legal citations—as well as a count of documents and comments in each monitoring item. The LEA’s self-review item statuses and comments will appear while the instrument has a status of In Progress or Received. After a SEA review of the instrument, all users will see the SEA review status of each item and any findings that have been recorded.

VI. OPPORTUNITY AND EQUAL EDUCATIONAL ACCESS	
VI-EE 5: EE Opportunity	
Updated 01/05/2011 by Ramiro Nava	
SEA Status	Meets Requirements
LEA Status	In Progress
Comments by SEA	
Comments by LEA	
Compliance Indicators	<p>LEA programs, activities, and student clubs are available to all persons without regard to sex, sexual orientation, gender, ethnic group identification, race, ancestry, national origin, religion, color, or mental or physical disability. (5 CCR 4926, 4960[a])</p> <p>5.1 The LEA monitors compliance with any and all rules and regulations. (EC 260)</p> <p>5.2 All student clubs have equal access to facilities and a fair opportunity to meet. (5 CCR 4927)</p> <p>5.3 No course or activity is labeled or scheduled which results in the separation of students on the basis of sex, sexual orientation, gender, ethnic group identification, race, ancestry, national origin, religion, color, and mental or physical disability. (5 CCR 4940[d])</p> <p>5.4 The LEA recognizes and eliminates unlawful discrimination. (5 CCR 4900)</p> <p>5.5 The LEA investigates complaints of unlawful discrimination. (5 CCR 4960[a])</p>
Inventory of Program Documents	
Other Documents	<p>Process for adding new courses</p> <p>Recruitment strategies</p> <p>Selection criteria</p>
Legal References	

Criteria Questions

Criteria questions determine the applicability of specific instrument items to an LEA. A single criteria question may affect one or more items. If an LEA answers “No” to all applied criteria questions for an item, that item will be removed from the instrument and the LEA will not

perform a self-review (if applicable) or provide evidence for the item.

Criteria questions are created at the instrument level and assigned to specific items under that instrument. The LEA will be prompted to respond to the criteria questions before beginning work on an instrument. If you have edit access, select the response for each question and click **Save**. If any questions remain unanswered (with a response of “None”), the user will be returned to the LEA Overview screen and may not continue working on the instrument. The other tabs of the Instrument Overview are not visible until all questions have been answered.

Items (25)

Criteria Questions (3)

Documents (0)

Status History (1)

⏪

⏩

1

▶

⏮

Page size: 25 ▼

Questions	Response
1. Does your LEA serve private schools?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> None
2. Does your LEA serve high school grades 9-12?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> None
3. Does your LEA have SIG recipients?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> None

Save

[Cancel](#)

⏪

⏩

1

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⏮

Page size: 25 ▼

Documents

The Documents tab displays a list of all documents uploaded into items of the instrument. If documents were uploaded as an evidence request response, the name of the evidence request will also appear.

Items (37)

Criteria Questions (0)





Documents (14)

Status History (1)

1

Page size: 25

1 to 14 of 14 items

Edit	Open	Size	Title	Description	Evidence Request	Updated	By
Edit	 Open		4 Week Letter	this is my description for the link 456	4 Week Letter	07/24/2012	Lily Bart (LEA)
Edit	 Download	87.25 KB	Attendance report		Attendance report	09/18/2012	Erin Carter (SEA)
Edit	 Open		<div><div>DRAFT</div>Completed ARRA Title I Part A Application updated</div>	testing more 123	Completed ARRA Title I Part A Application	07/25/2012	School Dude (School)
Edit	 Download	30.06 KB	<div><div>DRAFT</div>Consolidated Application (ConApp) Pages: Title I, Part A Reservations updated</div>	testing	Consolidated Application (ConApp) Pages: Title I, Part A Reservations (Required); Title I,	07/25/2012	School Dude (School)

Status History

You may view the status history of the Instrument by on the Status History tab on the Instrument Overview. This will show all of the instrument status updates, when they were made and by which user.

Items (37)	Criteria Questions (0)	Documents (14)	Status History (3)	Print Instrument Report
<div> <div> 1 </div> <div> Page size: 25 </div> <div> 1 to 3 of 3 Items </div> </div>				
Updated	By	Status		
11/29/2010	Administrator Administrator	In Progress		
12/03/2010	Tommy Lasorda	Submitted		
12/03/2010	Erin Carter	Received		
<div> <div> 1 </div> <div> Page size: 25 </div> <div> 1 to 3 of 3 Items </div> </div>				

Items

The Items tab lists the individual items under each category with a summary of the total number of completed items in each category. Click the plus sign to the left of the category name to expand and see all items in the category or the Expand All icon at the top left of the list. You can see if any documents or comments have been added to the item with the preview icons on the right.

Print Instrument Report

Items (31) Criteria Questions (3) Documents (6) Status History (2)

CATEGORY: I. Involvement 1 of 3 completed (1 not in compliance)

- ITEM: [I-CE 01: LEA Parent Involvement Policy](#) 4 + ⚠ Does Not Meet Requirements

- ITEM: [I-CE 02: School Parent Involvement Policy](#) + In Progress

- ITEM: [I-CE 03: Consultation with Private Schools](#) 1 + In Progress

+

CATEGORY: II. Governance and Administration 0 of 13 completed

+

CATEGORY: III. Funding 0 of 7 completed

Click on the item title to view the item response page.

Item Response Page Components

The information displayed for the Monitoring Item includes:

The **Compliance Indicators** section is the text of the monitoring item, giving background information and guidance to the LEA and to the reviewer about what is being addressed in the item.

WestEd Tracker LEA Monitoring User Guide

▼ COMPLIANCE INDICATORS

II-CE 4. An LEA operating ESEA Title I programs implements, monitors, and reviews the effectiveness of efforts described in the approved LEA Plan to help low-achieving children meet challenging achievement academic standards. (20 U.S.C. §§ 6312 (b)(1)(A), (B), (d)(3), 6316 (a)(1)(D).)

4.1 The LEA plan, at the discretion of the LEA, may include descriptions of high-quality student academic assessments that, in addition to the State academic assessments, the LEA will use to determine what revisions are needed to projects in the plan so that children meet the State academic achievement standards. (20 U.S.C. § 6312 (b)(1)(A) (iii).)

4.2 The LEA shall periodically review and, as necessary, revise its plan, which shall remain in effect for the duration of the LEA's participation under this part. (20 U.S.C. § 6312 (d)(2),(3).)

The **LEA Self-Review** section appears below the State Findings.

▼ LEA SELF-REVIEWLEA Status : In Progress

Comments by LEA

The **Requested Documents** tab displays specific evidence requests by the SEA for the monitoring item. Documents are uploaded in direct response to each requested document. Any documents uploaded by the LEA in response to an evidence request are available for download on this tab in the Attached Documents column. These documents also appear on the All Documents tab.

Requested Documents (4)

All Documents (5)

Resources (2)

Legal Citations (4)

Status History (6)

1

Page size: 25

1 to 4 of 4 items

Respond	Evidence Name	Description	Associations	Attached Documents
Respond	Affirmation signed by participating private schools [r]	Affirmation signed by participating private schools [r]	3	
Respond	CE proof of notification date [s]	CE proof of notification date [s]	3	
Respond	Consolidated Application and Reporting System (CARS) [r]	Consolidated Application and Reporting System (CARS) [r]	10	
Respond	LEA Parent Involvement Policy [r]	LEA Parent Involvement Policy [r]	1	LEA Parent Involvement Policy [r]

The **All Documents** tab contains a list of any Suggested Documents the SEA is giving as guidance. Below this in the Uploaded Documents section are any documents that the LEA has uploaded for this item, including those uploaded in response to specific evidence requests.

WestEd Tracker LEA Monitoring User Guide

Requested Documents (4) All Documents (5) Resources (2) Legal Citations (4) Status History (6)

SUGGESTED DOCUMENTS

[+ Attach Document](#)

Page size: 25 1 to 3 of 3 items

Document Name	Description
CE parent committee meeting agendas, minutes, and sign-in sheets [s]. These may come in the format of Microsoft Word, Microsoft Excel, or PDF. Please consolidate files whenever possible into a single document upload to minimize file cabinet contents.	CE parent committee meeting agendas, minutes, and sign-in sheets [s]. These may come in the format of Microsoft Word, Microsoft Excel, or PDF. Please consolidate files whenever possible into a single document upload to minimize file cabinet contents.
CE parent evaluation of parent involvement policy [s]	CE parent evaluation of parent involvement policy [s]
Parent involvement administrative regulations [s]	Parent involvement administrative regulations [s]

Page size: 25 1 to 3 of 3 items

UPLOADED DOCUMENTS

Page size: 25 1 to 5 of 5 items

Edit	Download	Size	Document/Link Name	Description	Evidence Request	Updated
Edit	Download	337 KB	COE Leads Training Cycle A	What about descriptions.		Erin Carter 09/13/2012
Edit	Download	248.9 KB	Documents that are required		Documents that are required	Erin Carter 08/13/2012
Edit	Download	0 byte	Flyer for Dodger High School			Tommy Lasorda 11/30/2010
Edit	Download	312.19 KB	LEA Parent Involvement Policy [r]		LEA Parent Involvement Policy [r]	Erin Carter 09/12/2012
Edit	Download	1.51 MB	LEA_User_Guide_v2_4.docx			Erin Carter 07/23/2012

The **Resources** tab displays files or web links provided by the SEA to the LEA in context of a compliance item. They may include templates, example documents, links to further information or other material assistance

Requested Documents (4) All Documents (5) Resources (2) Legal Citations (4) Status History (6)

[+ Attach Documents/Links](#)

Page size: 25 1 to 2 of 2 items

Download	Size	Document/Link Title	Description	Updated
Go to URL		Etiam elit dolor, mattis non volutpat sit amet, blandit sed sem Etiam elit dolor, mattis non volutpa	Mauris vitae ipsum nulla, ut pellentesque risus. Nunc consequat blandit adipiscing. Morbi ac velit felis. Cras eleifend volutpat fermentum. Sed sollicitudin dolor id leo rhoncus gravida. Suspendisse interdum lacinia quam eget interdum. In ornare congue sapien sed accumsan. Quisque lobortis ornare justo. Suspendisse mi arcu, egestas sed dictum a, sodales ac nulla. Donec suscipit mollis lectus, ultricies dictum arcu viverra sit amet. Donec ut ipsum sed magna rutruEtiam elit dolor, mattis non volua	09/11/2012
Download	307.76 KB	Sample parent involvement policy	This is a sample of a parent involvement policy for an LEA in PI. Use this as a guide only.	09/11/2012

The **Legal Citations** tab displays the legal references that drive the compliance item. The system allows the SEA to extract specific sections of code to display to users in relation to the particular item. The citation name and content of the citation are displayed for reference.

Requested Documents (4)	
All Documents (5)	
Resources (2)	
Legal Citations (4)	
Status History (6)	
Citation Name	
Citation 123	This is a legal reference
New citation	This is the description for it
SEC. 1112. LOCAL EDUCATIONAL AGENCY PLANS g4	(4) PARENTAL PARTICIPATION- Each local educational agency receiving funds under this part shall implement an effective means of outreach to parents of limited English proficient students to inform the parents regarding how the parents can be involved in the education of their children, and be active participants in assisting their children to attain English proficiency, achieve at high levels in core academic subjects, and meet challenging State academic achievement standards and State academic content standards expected of all students, including holding, and sending notice of opportunities for, regular meetings for the purpose of formulating and responding to recommendations from parents of students assisted under this part.
SEC. 1118. PARENTAL INVOLVEMENT. Part A, 2	(2) WRITTEN POLICY- Each local educational agency that receives funds under this part shall develop jointly with, agree on with, and distribute to, parents of participating children a written parent involvement policy. The policy shall be incorporated into the local educational agency's plan developed under section 1112, establish the agency's expectations for parent involvement, and describe how the agency will — (A) involve parents in the joint development of the plan under section 1112, and the process of school review and improvement under section 1116; (B) provide the coordination, technical assistance, and other support necessary to assist participating schools in planning and implementing effective parent involvement activities to improve student academic achievement and school performance; (C) build the schools' and parents' capacity for strong parental involvement as described in subsection

The **Status History** tab shows a history of item statuses both for the LEA's self-review and the SEA review (when the review is complete).

Requested Documents (4)	
All Documents (5)	
Resources (2)	
Legal Citations (4)	
Status History (6)	
<div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> </div> <div>Page size: 25</div> <div>1 to 6 of 6 items</div> </div>	
By	Date
Erin Carter	09/12/2012
Administrator Administrator	09/11/2012
Administrator Administrator	09/11/2012
Administrator Administrator	09/11/2012
Administrator Administrator	09/11/2012

Self-Review

The Self-Review tool allows you to make an informational determination of your own compliance with the item. The SEA will determine if the self-review is required or optional. If the self-review is required, you must change the LEA status of each item to something other than In Progress before you may submit the completed instrument to the SEA.

Start by clicking the **Edit** link in the LEA Self-Review area.

LEA SELF-REVIEW (OPTIONAL)

Current Status

In Progress

Comments to SEA

Edit

You may select from the following statuses:

- **In Progress:** indicates that the LEA is working on the item. This is the default value for an item with no previous response and can be edited by the user when it responds to the item.
- **Meets Requirements:** indicates that the LEA believes that the evidence is sufficient to meet requirements for the item.

- **Does Not Meet Requirements:** indicates that the LEA believes that the evidence is not sufficient to meet requirements for the item.
- **Not Monitored:** indicates that the item is not addressed during this monitoring cycle.

Select the appropriate status from the drop-down menu. Add any commentary to the **Comments to SEA** box to support the response. Click **Save** to record your answer. Click **Cancel** to cancel any changes you have made on the screen.

▼ LEA SELF-REVIEW (OPTIONAL)

Change Status

Meets Requirements

Comments to SEA :

We have uploaded all required documentation, per statute.

Save Cancel

Adding Evidence

The LEA provides evidence in two locations on the item page: in response to evidence requests on the Requested Documents tab and on the All Documents tab.

On the Requested Documents tab, click the **Respond** link next to the evidence request you are providing evidence for.

Requested Documents (4) All Documents (10) Resources (2) Legal Citations (3) Status History (5)				
<div> <div>1</div> <div>Page size: 25</div> <div>1 to 4 of 4 items</div> </div>				
Respond	Evidence Name ▲	Description	Associations	Attached Documents
Respond	Consolidated Application (ConApp) Pages: Title I, Part A Reservations (Required); Title I, Part A Reservations (Allowed); Title I, Part A School Allocations; Parent Involvement LEA Policy	Consolidated Application (ConApp) Pages: Title I, Part A Reservations (Required); Title I, Part A Reservations (Allowed); Title I, Part A School Allocations; Parent Involvement LEA Policy	1	Consolidated Application (ConApp) Pages: Title I, Part A Reservations updated
Respond	District policy and administrative regulations on parent involvement	District policy and administrative regulations on parent involvement	1	LEAPlan (2).pdf District policy and administrative regulations on parent involvement 123
Respond	Evidence of joint development, review, agreement, and distribution of policy, such as meeting agendas and minutes, enrollment packets, parent handbooks or other dissemination method(s) used	Evidence of joint development, review, agreement, and distribution of policy, such as meeting agendas and minutes, enrollment packets, parent handbooks or other dissemination method(s) used	1	Evidence of joint development, review, agreement, and distribution of policy
Respond	Local school board meeting agenda and minutes showing policy adoption	Local school board meeting agenda and minutes showing policy adoption	1	Student records Local school board meeting agenda and minutes showing policy

On the All Documents tab, click the **Attach Document** link to upload additional evidence not represented as individual evidence requests on the Requested Documents tab.

Requested Documents (4) All Documents (10) Resources (2) Legal Citations (3) Status History (5)	
<div> <div>POTENTIAL LINES OF EVIDENCE</div> <div>+ Attach Document</div> </div>	
<div> <div>Page size: 25</div> </div>	
Document Name ▲	Description
Annual evaluation of content and effectiveness of the parent involvement policy	Annual evaluation of content and effectiveness of the parent involvement policy
List of means of communications used for parent involvement activities	List of means of communications used for parent involvement activities
Notices of parent/staff mtgs. including topics, agendas, minutes indicating PD activities for building parents' capacity to assist their student to succeed academically & staff	Notices of parent/staff mtgs. including topics, agendas, minutes indicating PD activities for building parents' capacity to assist their student to succeed academically & staff

From either location, you will be directed to the Attach Document screen.

Requested Document Associations

If you are uploading a document in response to a requested document, you will see information about the evidence request at the top of the screen, including the SEA's title and description for the evidence, and a list of associations for the request. The **Associations** section lists any other monitoring item (in the same or other instruments for the same school year) and/or plan element where the same request is made. Click the link for any association to go to that monitoring item or plan element.

ADD NEW DOCUMENT

Title

Single Plan for Student Achievement (SPSA)

Description

Upload your most recent board-approved SPSA.

Associations

[II-EL 06: EL LEA Plan](#) , [II-EL 07: EL SPSA](#) , [II-EL 09: EL Inventory](#) ,
[III-CE 19: CE Supplement not supplant with CE \\$](#) , [III-EL 10: EL
Funding Adequate Resources](#) , [III-EL 11: EL Funding Adequate
Resources III-CP 9](#) , [III-EL 12: EL Funding Adequate Resources III-CP
10](#) , [III-SFSF 02: III-SFSF 2 Allowable Costs](#) , [III-SFSF 03: III-SFSF 3
Accounting of Funds](#) , [IV-CE 29: CE LEA/SSC annually evaluate SPSA
services](#) , [LEA Plan](#) , [Reading/Language Arts Proficiency](#)

Documents uploaded in response to an evidence request are automatically shared with any other monitoring item or plan element requesting the same document. When you upload a document in response to an evidence request, it will cross-populate with any of the areas in the Associations area and will not need to be re-uploaded into these locations.

Add Document

The Add a New Document screen provides four ways to add documents to the plan.

Add New File

Add a **New File** by browsing your computer and selecting the file to add. Provide a Title and Description. The default for the Title is the file name but you may uncheck this to create your own. Be sure to include file types that can generally be opened on most computers: Microsoft Office applications such as Word and Excel, PDF files and text files. If you have files in a software format not available to most users (Photoshop or design software), please convert to a PDF file. Add a Description if needed. Acceptable file types and sizes are displayed on the Attach Document screen for guidance. If you upload a document that falls outside the criteria displayed, an error message will result.

ADD NEW DOCUMENT
CE LEA Parent Involvement Policy
Select Document Type:
☒ **New File** *Please do not upload documents that contain student-identifying information*
 Browse... *File size limit: 500 MB Allowed file types*
.docx,.doc,.xlsx,.xls,.pdf,.txt
☐ Existing File
☐ Link to a web page URL
☐ Hard Copy Reference Only
Title *: *0/100*
☒ Use Filename
Description: *0/500*

Existing File

Selecting an **Existing File** that has already been added to the LEA File Cabinet. Only documents (including links and hard copy references) that have been provided by your organization will be available for selection to attach to a new item. Select Existing File, then click the Browse button.

ADD NEW DOCUMENT
CE LEA Parent Involvement Policy
Select Document Type:
☐ **New File** *Please do not upload documents that contain student-identifying information Allowed file types .docx,.doc,.xlsx,.xls,.pdf,.txt*
☒ **Existing File**
☐ Link to a web page URL
☐ Hard Copy Reference Only
Browse Cancel

You will see a view of the entire LEA file cabinet. You may select one or multiple documents by checking the box to the left of each document title. Click the **Review** button at the bottom of the screen to confirm the selected documents.

WestEd Tracker LEA Monitoring User Guide

DOCUMENTS - 68 LEA DOCUMENTS							
1		Page size: 25		1 to 25 of 68 items			
Edit	Open	Size	Title	Description	Evidence Request	Updated	By
<input type="checkbox"/>			POST REVIEW 1512 ARRA Report		1512 ARRA Report	09/15/2012	Erin Carter (SEA)
<input checked="" type="checkbox"/>		23.5 KB	POST REVIEW 1512 ARRA Report		1512 ARRA Report	08/22/2012	Erin Carter (SEA)
<input type="checkbox"/>		27 KB	POST REVIEW 1512 ARRA Report		ConApp, Part II reservations page 1512 ARRA Report	07/24/2012	Lily Bart (LEA)
<input type="checkbox"/>		21.5 KB	1512 ARRA Report		1512 ARRA Report	02/23/2012	Andrew Davidson (WestEd) (SEA)
<input type="checkbox"/>		17.63 KB	2.5_release_tickets.xlsx			09/07/2011	Erin Carter (SEA)
<input checked="" type="checkbox"/>		76.69 KB	2.8_requirements.docx			05/21/2012	Erin Carter (SEA)
<input type="checkbox"/>		72.83 KB	POST REVIEW 2.8_requirements.docx		ConApp, Part II reservations page	03/22/2012	Erin Carter (SEA)
<input type="checkbox"/>		21.5 KB	POST REVIEW 301 Plan	This is the right one!	301 Plan	07/14/2011	Don District (LEA)
<input type="checkbox"/>		65.69 KB	DRAFT AcceleratingAchvmt.pdf			09/15/2012	Erin Carter (SEA)
<input checked="" type="checkbox"/>		28.26 KB	accounting.xlsx	Title I funds documentation		09/14/2011	Lily Bart (LEA)

Then click **Attach** to save the selection and associate the existing documents to the new location.

FILE CABINET

Attach a Document

Instrument Item

CE LEA Parent Involvement Policy

Review your selections below, then click "attach" button.

DOCUMENTS - 3 LEA DOCUMENTS

1

Page size: 25

1 to 3 of 3 items

Edit	Open	Size	Title	Description	Evidence Request	Updated	By
<input checked="" type="checkbox"/>		23.5 KB	POST REVIEW 1512 ARRA Report		1512 ARRA Report	08/22/2012	Erin Carter (SEA)
<input checked="" type="checkbox"/>		76.69 KB	2.8_requirements.docx			05/21/2012	Erin Carter (SEA)
<input checked="" type="checkbox"/>		28.26 KB	accounting.xlsx	Title I funds documentation		09/14/2011	Lily Bart (LEA)

1

Page size: 25

1 to 3 of 3 items

Attach [Cancel](#)

Web links

Link to a web page may be selected if your evidence is already available for download online or if your evidence is the webpage itself, such as an area of your LEA website where parent notifications are available. Add a valid URL to create the record. Provide a Title and Description of the web link.

ADD NEW DOCUMENT
CE LEA Parent Involvement Policy
Select Document Type:
☐ New File Please do not upload documents that contain student-identifying information Allowed file types .docx,.doc,.xlsx,.xls,.pdf,.txt
☐ Existing File
☒ Link to a web page URL
☐ Hard Copy Reference Only

Title *: 34/100

Description: 57/500

Hard copy references

Add a **Hard copy reference only**. Select the Hard Copy Reference Only option to indicate that you are not uploading a document but have documentation for the item. You may note that the evidence is available by adding a title and checking the Hard Copy checkbox and then indicating in the Description field if the document is available for review in person (such as in the event of an onsite visit).

Here are some reasons why you might use the Hard Copy Reference option:

- It contains student-identifying or otherwise sensitive information. This type of document should not be uploaded to the system.
- It may be in progress, but not yet complete. In this case, you may include a date on which the document will be available for review.
- It may not be electronically available. Documents with signatures or other handwritten information cannot always be scanned.
- It was created by an application that is not supported by the SEA, such as a graphic design application or data analysis tool. In many cases, these files can be converted to or saved as a more common file type for upload (such as PDF) but if not, a hard copy reference may be used instead.

ADD NEW DOCUMENT
CE LEA Parent Involvement Policy

Select Document Type:

☐ New File Please do not upload documents that contain student-identifying information Allowed file types .docx,.doc,.xlsx,.xls,.pdf,.txt

☐ Existing File

☐ Link to a web page URL

☒ Hard Copy Reference Only

Title *:

19/100

Student test scores

Description:

71/500

We will present this student-identifying data during Tuesday's meeting.

Draft documents

Check the Draft box if you would like to block SEA staff from downloading a document before it is ready for review.

Documents uploaded by School-level users will be automatically set to Draft, allowing LEA staff to review the documents and update the draft status before SEA staff may access the documents.

Please note that documents set as Draft (manually by LEA users or automatically for School users) will need to be individually un-checked as Draft before they may be reviewed by the SEA. This can require a lot of manual clean-up so it is encouraged to use the Draft status sparingly. If you have a School user who will be contributing many documents to the LEA's monitoring instruments, you may wish to set the user up as a LEA-level user instead so that Draft documents do not need to be individually updated later.

School Associations

A list of schools in the LEA appears at the bottom of the upload screen and you may create an association with a specific school site for a document that is not representative of the entire LEA. LEA users may check off one or more schools to associate with a particular document. School users may select only the school(s) they have access to and must select at least one.

Check the box for the school(s) the document relates to.

School Associations:

☒ Basics Elementary School - S11111

☐ Curiosity Elementary School - S22222

☐ Excellence Elementary School - S33333

☐ Learners Middle School - S44444

☐ Marvelous Middle School - S55555

Attach [Cancel](#)

When all fields for the Attach Document screen have been completed, click the **Attach** link at the bottom of the screen to save.

Accessing Files

All documents uploaded to Tracker by the LEA will be contained within the LEA's File Cabinet, but may be accessed in a variety of filtered views.

The most specific view of documents is from the All Documents tab of the item response page, in the Uploaded Documents section. This displays all documents uploaded for that item, with references to evidence requests, if applicable.

UPLOADED DOCUMENTS							
1		Page size: 25		1 to 11 of 11 items			
Edit	Open	Size	Title	Description	Evidence Request	Updated	By
Edit	Open		4 Week Letter	this is my description for the link 456	4 Week Letter	07/24/2012	Lily Bart (LEA)
Edit	Download	87.25 KB	Attendance report		Attendance report	09/18/2012	Erin Carter (SEA)
Edit	Download	30.06 KB	[DRAFT] Consolidated Application (ConApp) Pages: Title I, Part A Reservations updated	testing	Consolidated Application (ConApp) Pages: Title I, Part A Reservations (Required); Title I, Part A Reservations (Allowed); Title I, Part A School Allocations; Parent Involvement LEA Policy	07/25/2012	School Dude (School)
Edit	Download	856.2 KB	District policy and administrative regulations on parent involvement 123	adding more details	District policy and administrative regulations on parent involvement	07/24/2012	Lily Bart (LEA)
Edit	Download	19 KB	ELSSA (updated)	New document	ELSSA	07/24/2012	Lily Bart (LEA)

Click **Download** or **Open** in the Open column to download the file or view the web link. Click the document title to view or edit details about the file. Click the Evidence Request title to view documents uploaded just for that request.

EVIDENCE REQUEST

Title:
LEA Parent Involvement Policy [r]

Description:
LEA Parent Involvement Policy [r]

Associations
[I-CE 01: LEA Parent Involvement Policy](#)

+ Add New Document

Page size: 25

1 to 1 of 1 items

Open	Title	Type	UPDATED	BY
	312.19 KB LEA Parent Involvement Policy [r]	file	09/12/2012	Erin Carter (SEA)

Page size: 25

1 to 1 of 1 items

All documents for all items in an instrument may be viewed on the Documents tab of the Instrument Overview page.

Items (37) Criteria Questions (0) Documents (14) Status History (1) Print Instrument Report						
Page size: 25 1 to 14 of 14 items						
Edit	Open	Size	Title	Description	Evidence Request	Updated By
Edit	Open		4 Week Letter	this is my description for the link 456	4 Week Letter	07/24/2012 Lily Bart (LEA)
Edit	Download	87.25 KB	Attendance report		Attendance report	09/18/2012 Erin Carter (SEA)
Edit	Open		[DRAFT] Completed ARRA Title I Part A Application updated	testing more 123	Completed ARRA Title I Part A Application	07/25/2012 School Dude (School)
Edit	Download	30.06 KB	[DRAFT] Consolidated Application (ConApp) Pages: Title I, Part A Reservations updated	testing	Consolidated Application (ConApp) Pages: Title I, Part A Reservations (Required); Title I, Part A Reservations (Optional)	07/25/2012 School Dude (School)

Document icons

Some documents might have icons next to the title.

Lock icon: Documents with the Lock icon are attached to monitoring items that have been reviewed and have a status of Meets Requirements. These documents are locked from editing to provide a archive of what was used to determine compliance for that item.

Draft icon: Documents with the Draft icon have been set to Draft mode by the uploader or document editor. SEA users may not download these documents.

Post Review icon: Documents with the Post Review icon are documents uploaded after the instrument status has been finalized by the Reviewer. These may be documents that the LEA has uploaded to respond to SEA findings.

File Cabinet

All documents uploaded by the LEA can be accessed from the main **LEA File Cabinet** navigation tab.

All documents uploaded by the LEA can be accessed from the main **LEA File Cabinet** navigation tab. The LEA File Cabinet has two views: Documents and Evidence Requests. The Documents tab has all documents currently uploaded into the file cabinet for either Plan or Monitoring activities, including in response to specific evidence requests.

The default view is the current school year. Use the school year filter to select a different year or All Years to remove the filter.

You may filter by the user who uploaded the document using the Uploader filter. You may filter by documents uploaded into either the plan or the monitoring areas of the system with the Module filter. If applicable, the Document type filter contains any values that exist for documents in the file cabinet: Draft, Hard copy or Post-review documents. If any documents have school associations, the School filter will display schools to select.

The text search will search for any words or part of word in the document Title or Description fields.

FILE CABINET

Documents
Evidence Requests

FILTERS

Search:

School Year:
2012 – 2013 School Year

Uploader:
All Uploaders

Modules:
Monitoring And Plan Docs

Document type:
Show All Docs

School:
Search

Update
Clear

20 LEA Documents

1

Page size: 25

1 to 20 of 20 items

Edit	Open	Size	Title	Description	Evidence Request	Updated	By
Edit	Download	312.19 KB	2012-2013 monitoring document		Reading/Language Arts test results Program research evidence	06/21/2012	Erin Carter (SEA)
Edit	Download	264.5 KB	Admin Bldg.doc		Program research evidence	08/06/2012	Erin Carter (SEA)
Edit	hard copy		Another document	A hard copy reference	This is a request for all School Plans This is for both LEA and School Plans	07/23/2012	Erin Carter (SEA)
Edit	Download	907.5 KB	CAIS State User Guide 1.05.doc			06/05/2012	Purple Peopleater (School)

You may sort the File Cabinet by Title, Last Updated or Last Updated By. Click the column title to sort by that criteria. Click again to reverse the sort.

Evidence Requests

From the main File Cabinet view, the Evidence Requests tab shows all evidence requests in the system across both Plan and Monitoring activities. These include specific evidence requests for monitoring items, SEA goals and SEA strategies. You may select Monitoring Requests from the Request Type filter to show only requests for monitoring instruments (excluding plan-only requests). A second menu will appear with a list of currently assigned instruments. You may select one to narrow the list further by requests in that instrument. Another menu will appear to filter the instrument requests by a specific monitoring item, if needed.

FILE CABINET

Documents Evidence Requests [Print Page](#)

FILTERS

School Year: 2011 – 2012 School Year Search: Uploader: All Uploaders

Request Type: Monitoring Requests Monitoring Instruments: Title I, Part A (CE) Monitoring Items: All Monitoring Items

[Update](#) [Clear](#)

8 REQUESTS, 8 DOCUMENTS

Page size: 25 1 to 8 of 8 items

Respond	Evidence Name	Description	Associations	Attached Documents
Respond	Completed ARRA Title I Part A Application	Completed ARRA Title I Part A Application	10	1
Respond	Consolidated Application (ConApp) Pages: Title I, Part A Reservations (Required); Title I, Part A Reservations (Allowed); Title I, Part A School Allocations; Parent Involvement LEA Policy	Consolidated Application (ConApp) Pages: Title I, Part A Reservations (Required); Title I, Part A Reservations (Allowed); Title I, Part A School Allocations; Parent Involvement LEA Policy	1	1
Respond	District policy and administrative regulations on parent	District policy and administrative regulations on parent	1	2

Click the evidence request name to view details about the request, including which monitoring items, plan goals and/or strategies the evidence request is associated with, and any documents that have been uploaded by the LEA for that request. Click **Respond** to upload evidence to the request.

Editing and Deleting Documents

If you have access to edit a document, clicking the Title of the document from any view of the file cabinet will lead to the Edit Document page.

DOCUMENTS - 1 LEA DOCUMENT FOR "ATTENDANCE"

Page size: 25 1 to 1 of 1 items

Edit	Open	Size	Title	Description	Evidence Request	Updated	By
Edit	Download	87.25 KB	Attendance report		Attendance report	09/15/2012	Erin Carter (SEA)

Page size: 25 1 to 1 of 1 items

[Delete](#)

ATTENDANCE REPORT

Filename:	Type:	Size:	Last Updated:	By:
Open piyear3_2012-09-14.xlsx	file	87.25 KB	9/18/2012 12:21:44 PM	Erin Carter

[Replace](#)

Original User Type:
SEA

Downloads:
None

Title: * 17/100

Description: 0/500

☐ Draft

Draft records are seen by all users with access, but can only be downloaded by users in the local district.

[Save](#)
[Cancel](#)

Associations (2)

Remove	Item Type	Title	Requested By
Remove	Evidence Definition	Attendance report	A-5: Performance Based Compensation System (301 plan), LEA Plan
Remove	Monitoring Item	I-CE 01: CE LEA Parent Involvement Policy (Title I, Part A (CE))	

SCHOOLS (2)

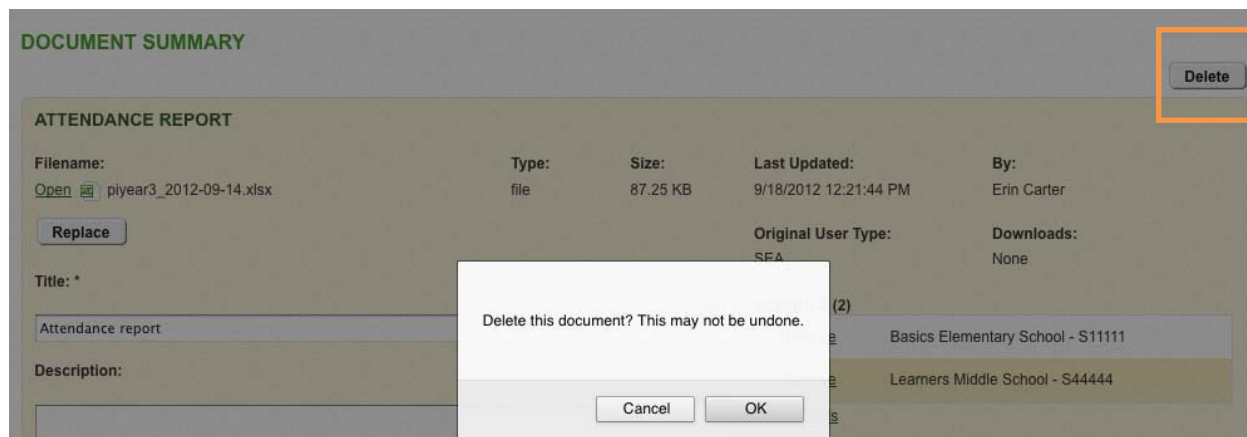
Remove	Basics Elementary School - S11111
Remove	Learners Middle School - S44444

[Add Schools](#)

You may edit the Title and Description of any document, modify it's Draft status, modify the URL for a web link, or replace a file for a document. School associations may be removed by clicking the **Remove** link to the left of the school in the Schools section. New schools may be added by clicking the **Add Schools** link.

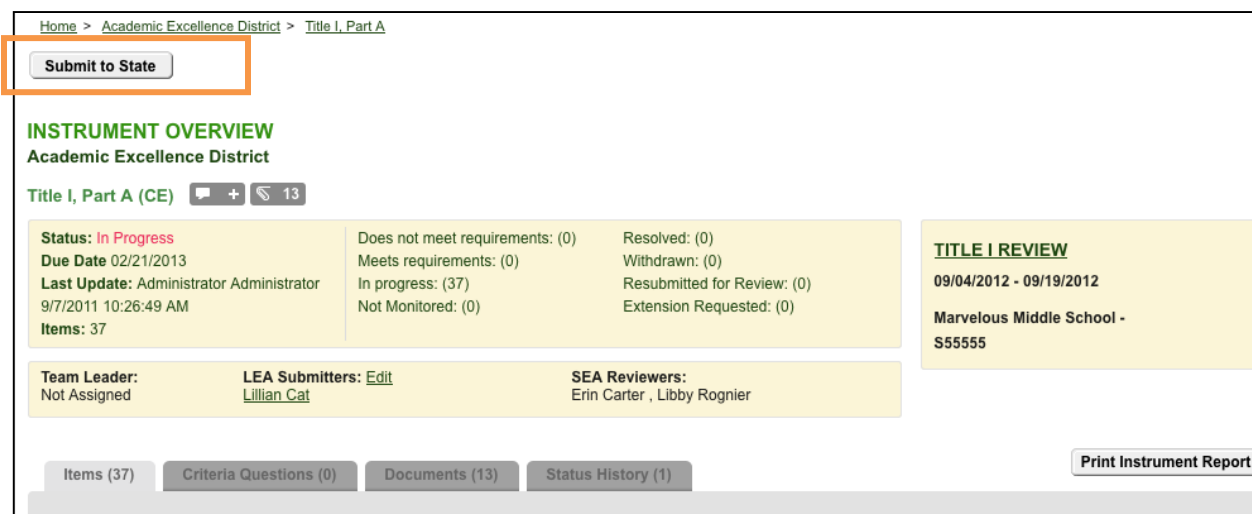
The Associations tab lists all of the locations where the file is being used. You may remove the document's association with a monitoring item, plan element, or evidence request by clicking the **Remove** link to the left of the location name. This retains the document in the file cabinet for any (or no) remaining locations but severs the association with the removed location.

To delete a document from the file cabinet completely, click the **Delete** button at the top of the screen and confirm.



Submitting Instruments (LEA Submitters only)

After uploading all evidence for the items in a particular instrument and completing the self-review (if required), the Submitter submits the completed instrument to the SEA. LEA users who have been selected as Submitters for the instrument will see a button at the top and bottom of the Instrument Overview page labeled **Submit to State**. Click this button to start the submit process.



You will be asked to confirm on the next screen. Click **Submit** to complete. Click **Cancel** to cancel the submit process.

Submitting the instrument indicates to the SEA that the status of the instrument is now "Submitted" and that associated documents are ready for review. The SEA reviewer will then change the status to "Received" to indicate that the desktop review has started.

Once an instrument is in a status of "Received," any modification to the LEA file cabinet should be communicated to the reviewer.

Viewing Findings

After the SEA has concluded the review, the instrument status will be changed to either Accepted or Needs Further Action. The LEA may access any items that are non-compliant and the findings may be viewed in three areas: on the item page, in the Instrument PDF report, or on the SEA Findings screen.

Item Page

When returning to the item page after the instrument has been reviewed, the SEA's item status, due date, and any applicable findings will be viewable to the LEA underneath the compliance indicators section in the **State Findings** section.

The screenshot shows the 'ITEM OVERVIEW' page for 'I-EL 02: EL Involvement EL Advisory Committee (ELAC)'. It includes 'Previous Item' and 'Next Item' buttons. A 'COMPLIANCE INDICATORS' section is visible. The 'STATE FINDINGS' section is highlighted with an orange border and contains the following information:

- SEA Status :** ⚠ Does Not Meet Requirements
- DUE DATE :** 09/30/2011
- Comments by SEA :**
 - A review of the ELAC minutes, agendas and meeting notifications revealed that Excellence Elementary School does not have an ELAC that meets all legal requirements (a) through (f).
 - Excellence Elementary School must submit evidence such as meeting announcements, agenda, minutes, reports or other documentation to verify that their corresponding ELAC meets all legal requirements.

SEA Findings Screen

The SEA Findings screen may be accessed after a review from either an Onsite (if applicable) on the LEA Overview:

The screenshot shows the 'ONSITES' section of the LEA Overview page. It lists several onsite visits and reviews with their dates. The 'SEA Findings' link is highlighted with an orange border.

ONSITES	
Annual onsite visit	09/24/2012 - 09/26/2012
Annual onsite visit 12-13	09/24/2012 - 09/26/2012
Title I review	09/04/2012 - 09/19/2012
SEA Findings	

Or from the Monitoring tab:

WestEd Tracker LEA Monitoring User Guide

Current LEA: **Academic Excellence District** Setup & Maintenance

LEA Overview **Monitoring** Plan LEA File Cabinet Plan Tags

Home > Academic Excellence District > Instruments

MONITORING

Instruments (13) **Items** View SEA Findings

Page size: 25 1 to 13 of 13 items

Instruments	Status	Last Updated	Team Leader	Submitters	Reviewers	Total / Noncompliant
2010-2011 instrument (10-11)	In Progress	04/24/2012	Not Assigned	Not Assigned	Libby Roanier	1 / 0

Items with a status of Does Not Meet Requirements, Resolved, Withdrawn, Resubmitted and Extension Requested (if used) will appear on this view with the text of the current findings.

LEAs List **Current LEA: Academic Excellence District** Setup & Maintenance

LEA Overview **Monitoring** Plan LEA File Cabinet Plan Tags

Home > Academic Excellence District > Instruments > District Findings

SEA FINDINGS

Page size: 25 1 to 12 of 12 items

Instrument	Item Title	Item Identifier	Findings	Due Date	Status
English Learners	EL SPSA	II-EL 07	The SPSA does not contain: (d) Expenditures of funds allocated to the school through the Consolidated Application. (e) The means of annually evaluating the progress of programs toward accomplishing the goals, including determining whether the needs of all children have been met by the strategies used, particularly the needs of low-achieving students and those at risk of not meeting state academic content standards. (20 USC 6314[b][1][2], 6315[c][2], EC 64001[f])	12/01/2011	⚠ Does Not Meet Requirements
English Learners	EL Funding Adequate Resources III-CP 9	III-EL 11	The LEA uses only 75 percent of Economic Impact Aid (EIA) apportionments at school sites for direct services to students.	12/01/2011	⚠ Does Not Meet Requirements
English Learners	EL Accountability Reclassifies Pupils	IV-EL 15	The LEA does not maintain in the pupil's permanent record documentation of the following: Participants in the reclassification process	12/01/2011	⚠ Does Not Meet Requirements
English Learners	EL 15% Translation Requirement	II-EL 08	The LEA did not provide sufficient documentation.	12/01/2011	⚠ Does Not Meet Requirements

Instrument PDF report

When an instrument has a status of Accepted or Needs Further Action, the SEA statuses and findings are available to the LEA in the Instrument PDF report, accessible from the Instrument Overview screen.

INSTRUMENT OVERVIEW
Academic Excellence District
English Learners (EL) 3 12

Status: Needs Further Action
Due Date: 12/23/2011
Last Update: Erin Carter 11/1/2011 10:57:16 AM
Items: 22

Does not meet requirements: (6)
 Meets requirements: (16)
 In progress: (0)
 Not Monitored: (0)

Resolved: (0)
 Withdrawn: (0)
 Resubmitted for Review: (0)
 Extension Requested: (0)

TITLE I REVIEW
 09/04/2012 - 09/19/2012

Team Leader:
 Not Assigned

LEA Submitters: [Edit](#)
[Lily Bart](#) , [Andrew Davidson](#) , [Don District](#) ,
[Alexander Weeks](#)

SEA Reviewers:
 Erin Carter , Libby Rognier

Items (22)

Criteria Questions (3)

Documents (12)

Status History (4)

Print Instrument Report

Resubmitting Items (LEA Submitters only)

After an instrument review, the resolution of non-compliant items is tracked on an item-by-item basis in Tracker. The LEA may return to any instrument and respond to non-compliant findings by uploading new documents. At the point that the LEA has responded to the findings with new documents, the instrument's Submitter may resubmit the non-compliant item to the SEA.

On the item response page, check the box for the confirmation statement and click the **Resubmit Item** button to notify the SEA that your response to findings has been made. An email notification will be sent to all associated monitoring roles and the item status will become "Resubmitted."

STATE FINDINGS

SEA Status : ⚠ Does Not Meet Requirements

DUE DATE :
 09/30/2011

Resubmit Item

Comments by SEA :
☒ The LEA or applicable agency certifies that all corrective actions specified below have been or will be implemented at all sites in the LEA and ensures that the new procedures will be used in the future.
 A review of the ELAC minutes, agendas and meeting notifications revealed that Excellence Elementary School does not have an ELAC that meets all legal requirements (a) through (f).
 Excellence Elementary School must submit evidence such as meeting announcements, agenda, minutes, reports or other documentation to verify that their corresponding ELAC meets all legal requirements.

After a subsequent review, the SEA may change the item status to "Resolved" or "Withdrawn" or send it back to "Does Not Meet Requirements" for the LEA to continue to work on the item.

Setup & Maintenance

The Setup & Maintenance link appears in the top right corner of the screen to LEA Administrative users. If you have access to this screen, you have access to manage users for the LEA.

LEA and school users who are associated with your LEA have access to your LEA and school plans. Users assigned to the LEA or school may update most areas of the plan:

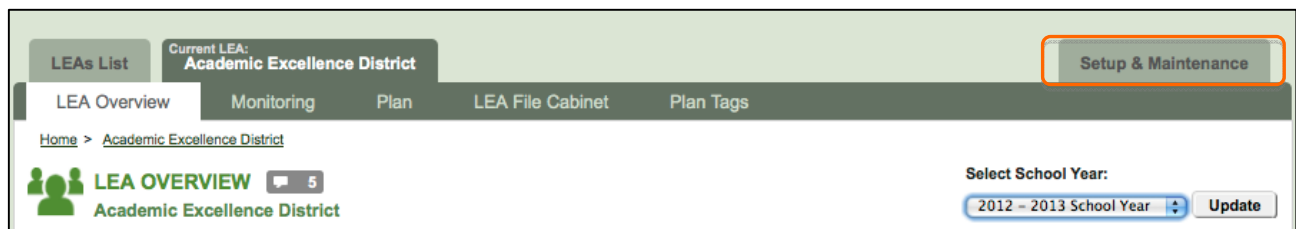
- Add or edit strategies, action steps, tasks, budget items and status updates
- View and upload documents
- View and add comments on plan elements

These users may also be assigned as a person responsible for an action step or task.

Note: In order to support users who provide services in multiple LEAs or schools, LEA or school level users in Tracker may be assigned to more than one organization. As a LEA or school administrator, you may only add or change user information specific to your organization; you may not modify information from other organizations, or retire a user who is actively assigned to other organizations.

Add Users

To add a new user, click the **Setup & Maintenance** link at the top of any page. Only LEA and



School Administrators will see this link.

From the Setup & Maintenance menu, select **User Management**. You will see a list of all users currently assigned to your organization, and can search for users if needed.

Click **Add New User** to create and send an invitation to a new user.

Current LEA: Academic Excellence District

Setup & Maintenance

User Management

Home > Setup & Maintenance > User Management

CONTACT ADMINISTRATION

Instructions/Description

FILTER

[Show Advanced Filters](#)

User Name

Apply Clear

Assigned Users in Academic Excellence District

[+ Add New User](#)

Page size: 25 1 to 25 of 34 items

Name	Organization	Email	Level	Role
Edit Jane Austen	Academic Excellence District	ecarter+jane@wested.org	LEA	admin
Edit Lily Bart	Academic Excellence District	ecarter+lily@wested.org	LEA	Read-Only
Edit Ron Burgundy	Academic Excellence District	ecarter+ron@wested.org	LEA	

To add a user, complete the requested information. Select the **Level** (LEA or School) and the appropriate organization from the dropdown lists. The Level assigned to the user determines their access. Check the **Admin** box if the new user should have administrator privileges.

LEAs List

Current LEA: Academic Excellence District

Setup & Maintenance

User Management

Home > Setup & Maintenance > User Management > Add User

ADD NEW USER

Instructions/Description

Instructions/Description

First Name* 0/50 Last Name* 0/50

Email* 0/50 Phone: 0/50

Position: 0/100 Department: 0/100

Level *

☐ SEA

☐ LEA

☐ School

Role

☐ Admin

Create Account Cancel

When you click Create Account, an invitation with a link to the system will be sent to this user.

Click **Create Account** to send an email invitation, with a link to Tracker, to the new user.

User Access Levels

- **LEA User:** LEA Users can create plan strategies, action steps, and tasks, and upload documents to the File Cabinet. LEA Users can also see, comment on, and attach files to school plans in the LEA.
- **LEA Administrator** (Must be added by the SEA): In addition to performing all the functions of an LEA User, LEA Administrators have the ability to create new users in their LEA (LEA and school level), create LEA tags, manage goals and add or edit funding sources for the plan. They also have the ability to edit school plans in the LEA.
- **School User:** Where school plans are available, school users may perform all of the plan functions that LEA Users may perform. For LEA plans, school users may upload documents and post comments. They may see other schools' plans, but may not edit them.
- **School Administrator** (May be added by LEA Admin or SEA): In addition to performing all the functions of a School User, School Administrators have the ability to create new users for their school. They can manage goals and add or edit funding sources for their school plan.
- **Read-Only:** A user at any level may be designated as Read-Only. These users may view all information described here, but cannot modify any information within the system. Read-only users are not available for any plan assignments and may not receive posted comments. Please contact your SEA Administrator to request this option for a user.

User Management

User Management tools allow you to add or change user assignments or roles, and retire or disassociate users who no longer belong to your LEA or school. Click on the user name from the list of users to see details of their user account.

USER DETAILS
Description and Instructions for the contact view

Name Patricia Principal [Edit](#)
Email Irognier+pat@wested.org
Level School
Phone
Position
Department
Read-Only No

Invitation Number:
[CE7A358C56](#)
Sent 06/06/2012 by Libby Rognier. Accepted on 06/06/2012.
[Resend Invitation](#)

[Organization Assignments](#) [Monitoring Assignments](#) [Plan Assignments](#)

[Add Organization](#)

[Edit All](#) [Update All](#) [Cancel Edit All](#)

1

Page size: 25

1 to 2 of 2 items

Remove	Primary	Organization	LEA	County	Level	Role
Remove	<input checked="" type="checkbox"/>	Aloha Elementary - 19642126010862	ABC Unified - 19642120000000	Los Angeles - 19	School	admin
Remove		Carmenita Middle - 19642126066708	ABC Unified - 19642120000000	Los Angeles - 19	School	admin

1

Page size: 25

1 to 2 of 2 items

To assign the user to additional organizations, use the Organization Assignments tab and click **Add Organization**. Select the appropriate organizations for assignment and the user level for each, and click the **Associate Selected Organizations** button.

UNASSIGNED ORGANIZATIONS - 3 ORGANIZATIONS
Academic Excellence District

Select All Associate Selected Organizations

Page size: 25 1 to 4 of 4 items

Select	LEA ▲	Identifier	County	Select
<input type="checkbox"/>	aa California Test District	22222	Maricopa County - 344	<input type="radio"/> Admin <input type="radio"/> User
<input type="checkbox"/>	aa New Mexico Test District		Coconino County - 340	<input type="radio"/> Admin <input type="radio"/> User
<input checked="" type="checkbox"/>	Academic Excellence District		Pima County - 347	<input checked="" type="radio"/> Admin <input type="radio"/> User
<input type="checkbox"/>	Ace Test District	45454545	Apache County - 338	<input type="radio"/> Admin <input type="radio"/> User

If a person is associated with more than one organization, you may select a primary organization for the user, if you are an administrator for each of that user's assigned organizations. The primary organization name will appear with their user name in comments and user lists. Click the Edit link on the user's profile to select the primary organization. To remove access to organizations from a user, click the **Remove** link on their organization assignments list.

To change the user's role between User and Admin, click the **Edit All** button above the Organization Assignments list, then use the radio buttons to select the role. NOTE: you will only be able to change the role for those organizations to which you have administrative access.

Edit All Update All Cancel Edit All

Page size: 25 1 to 2 of 2 items

Remove	Primary	Organization ▲	County	Level	Role
		aa California Test District - 22222	Maricopa County - 344	LEA	<input checked="" type="radio"/> Admin <input type="radio"/> User
<input checked="" type="checkbox"/>		Academic Excellence District	Pima County - 347	LEA	<input type="radio"/> Admin <input checked="" type="radio"/> User

Retire a User

When a user has left your organization or changed roles, you may wish to retire them from active access to Tracker. Retiring a user removes all associated organizational assignments from the user account, including all monitoring and plan roles. Retired users cannot log into Tracker, will not receive e-mail communication, and cannot be assigned to any monitoring or plan role.

All activity tracked by the system will continue to be displayed for a retired user (such as recorded actions on an Action Step Status History or File Cabinet information about who uploaded a document) but the user's previous monitoring and plan roles will not be displayed anywhere in the system, including the user profile or the monitoring or plan assignment and display pages.

To retire a user, view the user's profile and click the **Edit** link next to their name. Click the **Retire** button on the Edit page. View the warning and confirm. Removing all organization assignments from a user will also mark them as retired.

User Management

[Home](#) > [Setup & Maintenance](#) > [User Management](#) > [Randy Writer](#)

EDIT USER

Description and Instructions for the contact edit

Instructions/Description

First Name* 5/50 Randy	Last Name* 6/50 Writer	Invitation Number: 21A302CF77
Email* 18/50 rwriter@nomail.com	Phone:	Sent 08/20/2012 by Don District.
Position: 5/100 Chair	Department: 21/100 English/Language Arts	Resend Invitation

Primary Organization:
Marvelous Middle School - S55555

[Save Changes](#) [Delete](#) **Retire** [Cancel](#)

Unable to delete this item because it is associated with other items in the system

View Retired Users

To view retired or unassigned users, use the **Show Retired** filter on the User Management list, in the Advanced Filters view.

[Home](#) > [Setup & Maintenance](#) > [User Management](#)

CONTACT ADMINISTRATION

Instructions/Description

FILTER
[Hide Advanced Filters](#)

User Name

Levels
All Levels

User Role
☒ Show Retired ☐ Admins Only

Reinstate a User

Adding an organization association to a retired user record will reactivate the user. This will not reinstate any previous monitoring or plan roles.