Planning and Monitoring Tracker (PMT)

LEA User Guide

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WestEd

Contents

Acknowledgements

WestEd's Planning and Monitoring Tracker (PMT) was developed by WestEd through the Southwest Comprehensive Center (SWCC) and the California Comprehensive Center (CACC), in collaboration with:

- Arizona Department of Education
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What is PMT?

The Planning and Monitoring Tracker (PMT) is a web-based tool designed to streamline Federal and State program monitoring and track the implementation and evaluate the effectiveness of District Improvement Plans. PMT provides a consolidated tool for managing and streamlining these two activities.

Plan Development

The information to develop your Plan comes from your LEA data gathered and reviewed offline, and may include a Self-Assessment (such as Standards and Rubrics for LEA Improvement), AYP determinations, local assessments, and your LEA experience and knowledge of needs.

Developing the LEA Plan is a collaborative activity of the LEA staff responsible for implementing the actions in the Plan. The key decisions and descriptions of the activities should be thoroughly discussed while the Plan is being developed. PMT provides step-by-step assistance to organize the information for planning, monitoring, and reporting.

Once you enter your Plan, you can use PMT's features to:

Budget	Plan and review the use of available funds by source and by allocation within the plan.
Organize	Develop sequential Goal, Strategies, Action Steps and Tasks; assign Timelines, Persons Responsible and Budget amounts; share the Plan with others.
Track	View the Plan on a timeline, track and report progress of implementation.
Communicate	Exchange and archive messages with your colleagues on your progress toward implementing your Plan.
Provide Evidence	Share files and resources with your colleagues through an online file cabinet.
Report	Create and access printer-friendly reports of full or filtered Plan views, including progress reports.

Once you have completed your Plan, you will login regularly to update the status of your activities and report on your progress toward accomplishing your goals. SEA will also check in regularly to keep track of your progress and prepare for onsite visits or provide guidance and feedback.

Monitoring

The Monitoring module of PMT helps streamline the process for Program Monitoring and other types of district 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 and providing assurances.

One advantage to the online system is that districts will collect and upload electronic versions of evidence for review by the SEA, rather than providing hard copies that are currently required.

End User System Guidelines

PMT 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 will likely work, but we cannot guarantee support for them at this time. The system itself does not require available local disk space, but it may be beneficial to have space on your computer for district document storage.

Although a document scanner would be helpful to make electronic versions of printed documents, it is not required.

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

User Accounts

In order to access PMT, you must have:

- An email account
- Authorization to add you as a user to PMT

Once the above two conditions are met, your PMT LEA Administrator will create a separate PMT user account for you. Your PMT user account is associated with your district. You will not be able to view or modify any data for other districts using PMT.

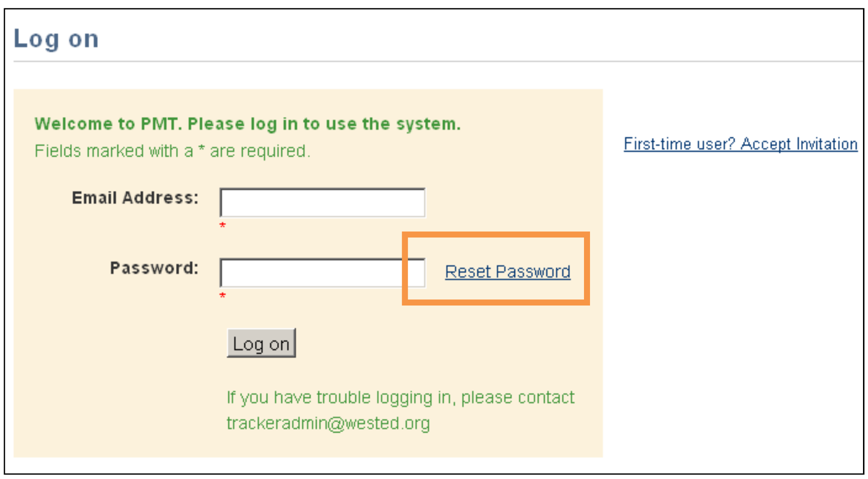
The administrative user who creates your PMT account will determine your access level. Your access level defines what you are allowed to do within the system. There are four access levels:

LEA User	LEA Users can work with both the Plan and Monitoring modules. They can edit Plan goals, create strategies, action steps, and tasks and upload documents to the File Cabinet. They can also respond to monitoring items by uploading evidence and responding to instrument item questions. LEA Users can also see, comment on, and attach files to School Plans in the district.
LEA Administrator	In addition to performing all the functions of an LEA User, LEA Administrators have the ability to create new users in their district and select which district users may submit completed instruments or plan goals to SEA. They can Manage Goals and Add or Edit

	funding sources for the Plan. They also have the ability to edit School Plans in the district.
School User	Where school plans are available, school users may perform all of the Plan functions that LEA Users may perform. For District Plans, school users may upload documents and post comments. Additionally, school users may upload Draft documents associated with their school to the LEA's program monitoring items.
School Administrator	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 the School Plan.

Accessing PMT (Logging in)

Enter your email address and password to enter the site. If you have forgotten your password, use the Password Recovery tool on the Login screen by clicking **Reset Password**.



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

Invitations

To access PMT, individuals must be invited by an administrative user. Users will receive an email invitation from the administrator with instructions for creating an account. The invitation email includes a web link that the user will access to accept the invitation.

To accept an invitation, click the link in the email or copy and paste it into your browser's address bar. Alternately, click the **First-time user? Accept Invitation** link on the Logon screen. If using the link in the email, it will lead to the **Accept Invitation** page, with your Invitation Code and email already filled in. Your email address will serve as your PMT username. You must select a password for your account. Your password must follow the guidelines shown on the right side of the screen.

After you click Create Account, you will be returned to the Login screen to enter your email address and the password you just created.

Creating User Accounts (LEA Admin Only)

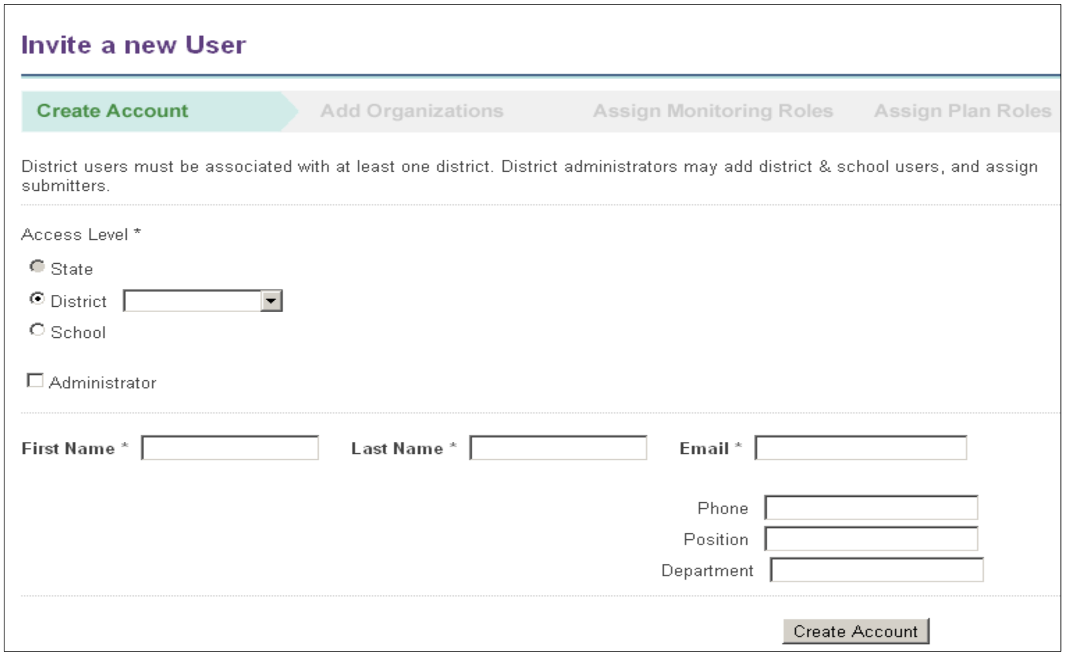
To create a new account, click the **Setup & Maintenance** link (visible only to Administrators) at the upper right side of the screen. Select **Users** on the left side navigation.

You may search the user list to see if someone already has an account. If not, click **Add a Contact** at the top of the list. The **Add Contact** screen will appear.

The first step in creating a new invitation is to indicate the **Access Level**. As a District Admin, you will only have access to the District and School selections. If selecting a District user, select the District name from the menu if you have access to more than one district. If selecting a School user, select the District, then the School.

Enter information for each new user:

- Check the Administrator box to give the user LEA Admin or School Admin rights
- Enter First Name, Last Name and Email Address
- Add other details if known (Phone number, Position and Department)

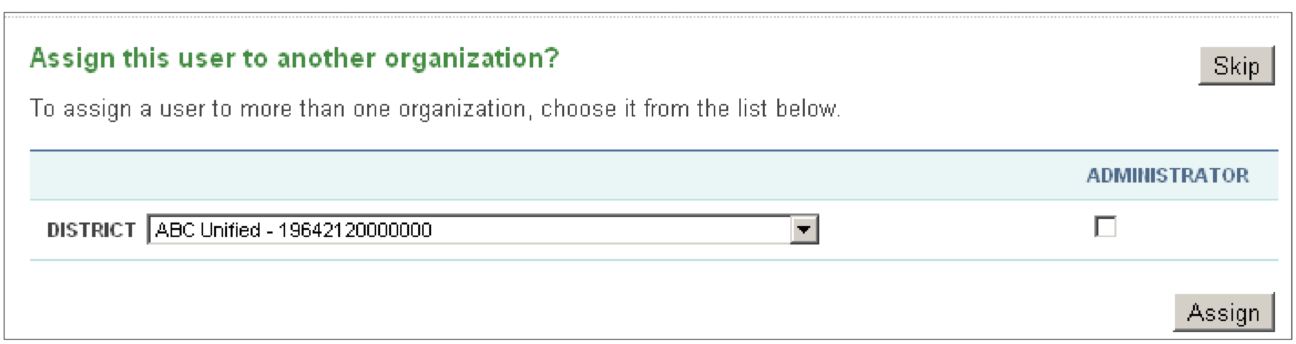


Click **Create Account** to save the information and send an email invitation to the new user.

Once you Create the Account, you will be directed to screens that allow you to associate the person with additional LEAs, and Assign Monitoring and Plan permissions, if appropriate.

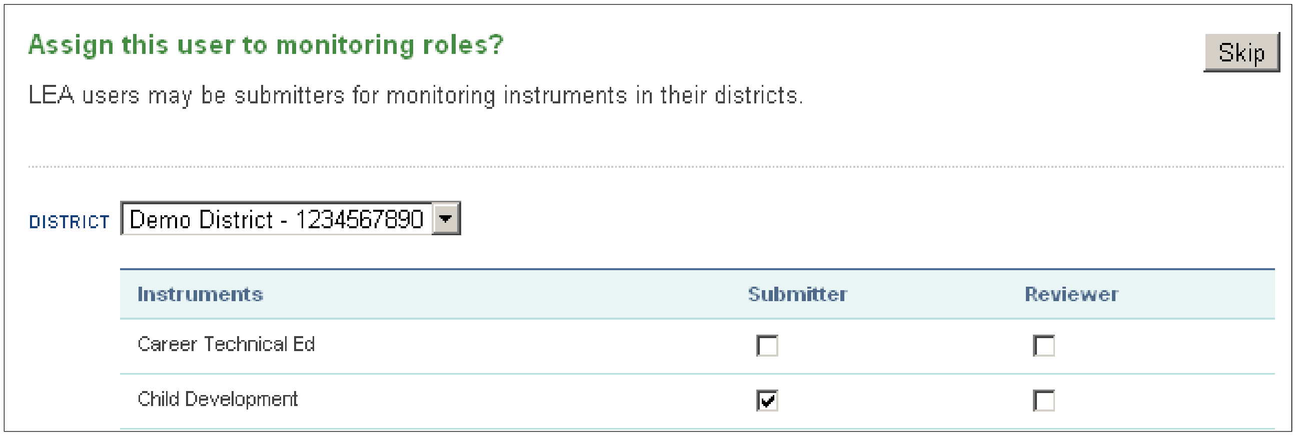
Add Organizations

You may add additional districts to a District-level account (if you have LEA Admin access for multiple LEAs) or additional schools to a School-level account. You may not add entities from a different level to someone's account (i.e. you may not add districts to a School account or Schools to a District account). Indicate if the user should have Admin access for the selected organization. Click **Assign** to add the new organization.



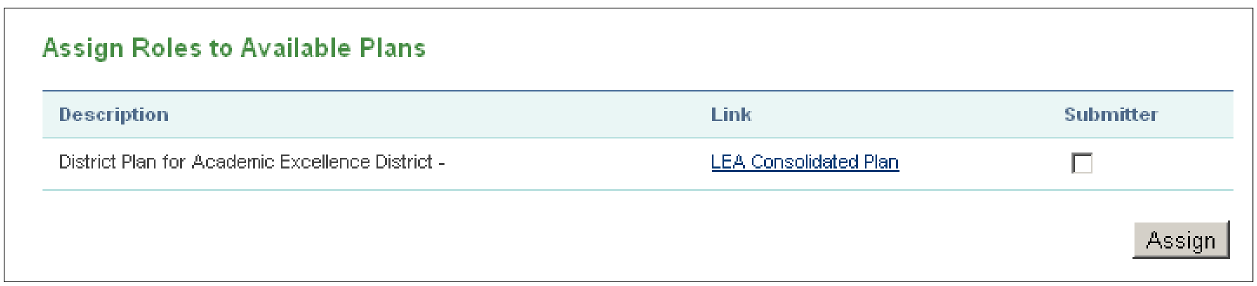
Add Monitoring Assignment

District-level users may be selected as instrument District Submitters for any instrument assigned to the district. (School users may not be selected as District Submitters). To add District Submitter access to the new user, select the instrument(s) off that you wish to add the user to and click Assign.



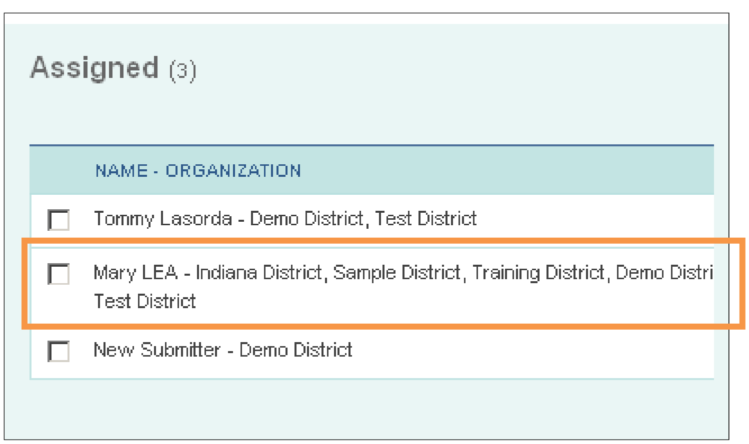
Add Plan Assignments

If Plan submittal/approval is used in the state, the last step in creating a District-level user allows the admin to assign the user to be a Plan Submitter. Select the District Plan that the user is a Submitter for and click Assign.



Users with Multiple Organizations

Some district and school users may have access to multiple organizations. State Administrators may set a Primary Organization for these users, as needed. If no Primary Organization is selected, all associated organizations will display with the user's name on the Comments and Assignment screens:



The user's Primary Organization, when selected, appears on the user profile's list of associations.

Organizations (7)

PRIMARY	DISTRICT	ORGANIZATION	LEVEL	
	RETIRED Cycle D Sample	Los Angeles - 19	District	user
	RETIRED Leaky District	Test County - X	District	user
	Indiana District	Test County - X	District	user
	Sample District	Los Angeles - 19	District	user
	Training District	Test County - X	District	admin
	Demo District - 1234567890	Test County - X	District	user
✓	Test District - X	Test County - X	District	admin

Read-Only Users

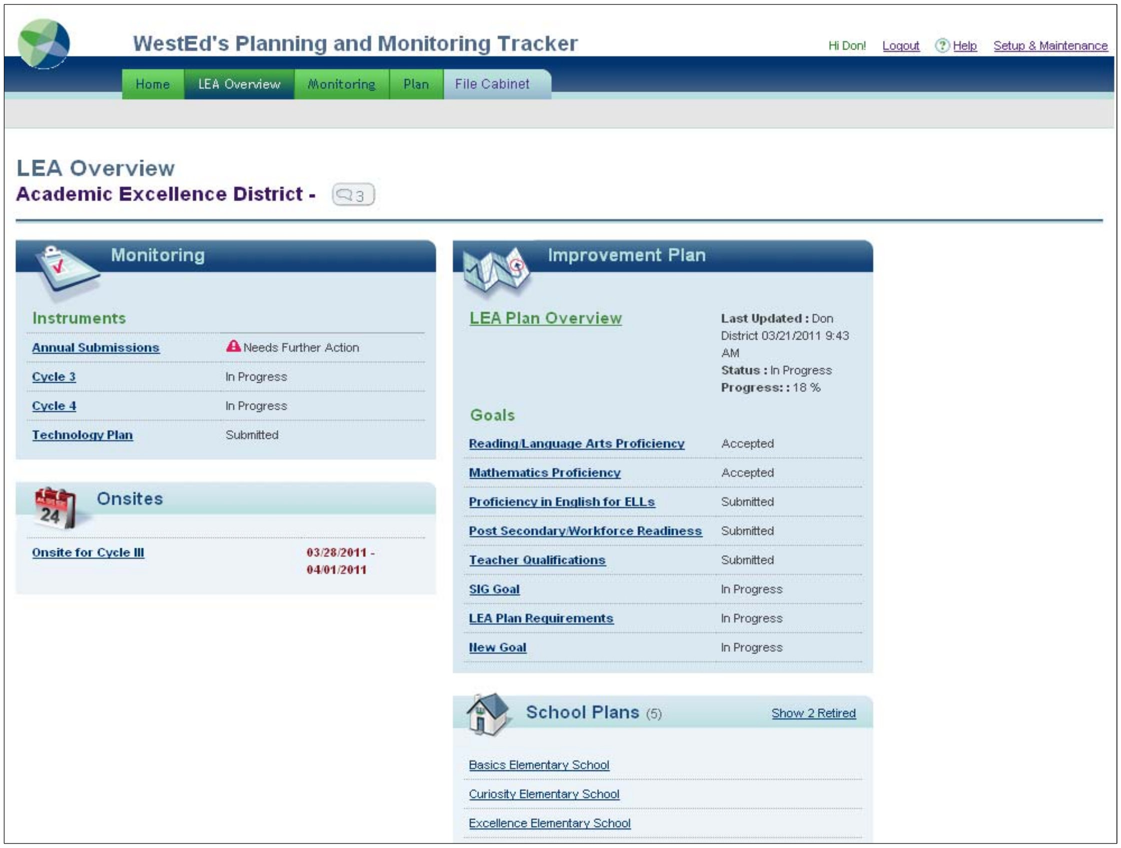
State Administrators may set up District or School users as Read-Only users. These users may access any area of the system based on their associated organizations but may not:

- Post comments
- Upload documents, links or hard-copies or associate documents
- Add or edit anything in a school or LEA plan
- Access Setup & Maintenance
- Participate in the self-review of a monitoring instrument
- Submit instruments
- Submit plan components
- Edit Onsite information for LEA or School Contacts/Notes

LEA Overview Page

The LEA Overview page is the default home page. Once you are logged on, your name appears in the upper right corner of the screen. You may logout by selecting the **Logout** link to the right of your name. You may also access Help resources by clicking the **Help** link in this section. The **Setup & Maintenance** link appears only to Administrative users.

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

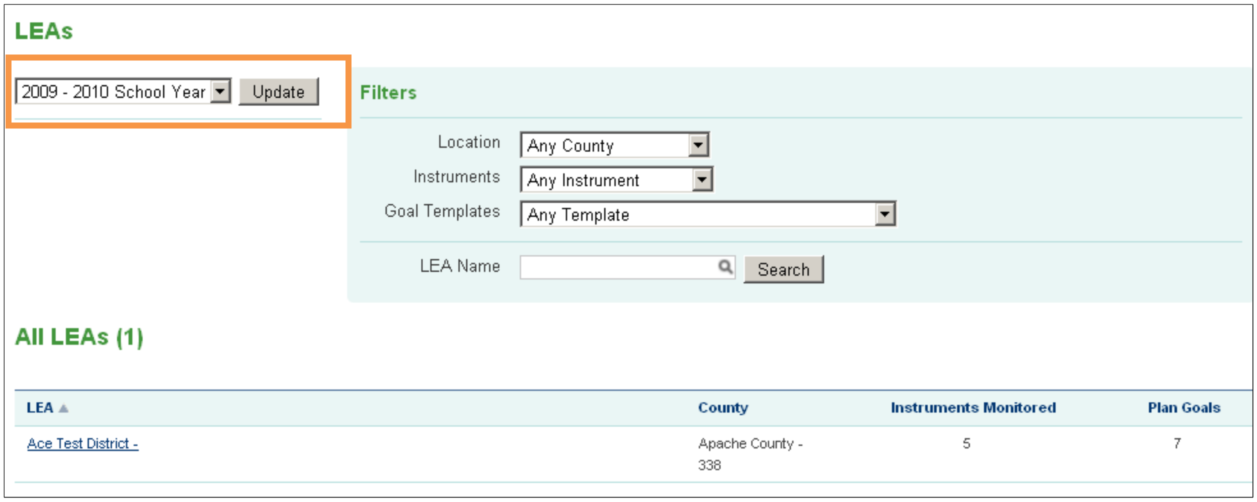


LEA List and School Years

If you have access to more than one district, the home page will be the LEAs screen. Here you will select the district you would like to view, which will take you to the LEA Overview screen for the selected district. For all users, this screen may be used to select a different school year from the default school year. School years are used to delineate monitoring efforts including monitoring instrument statuses and responses, as well as Improvement Plan budget years.

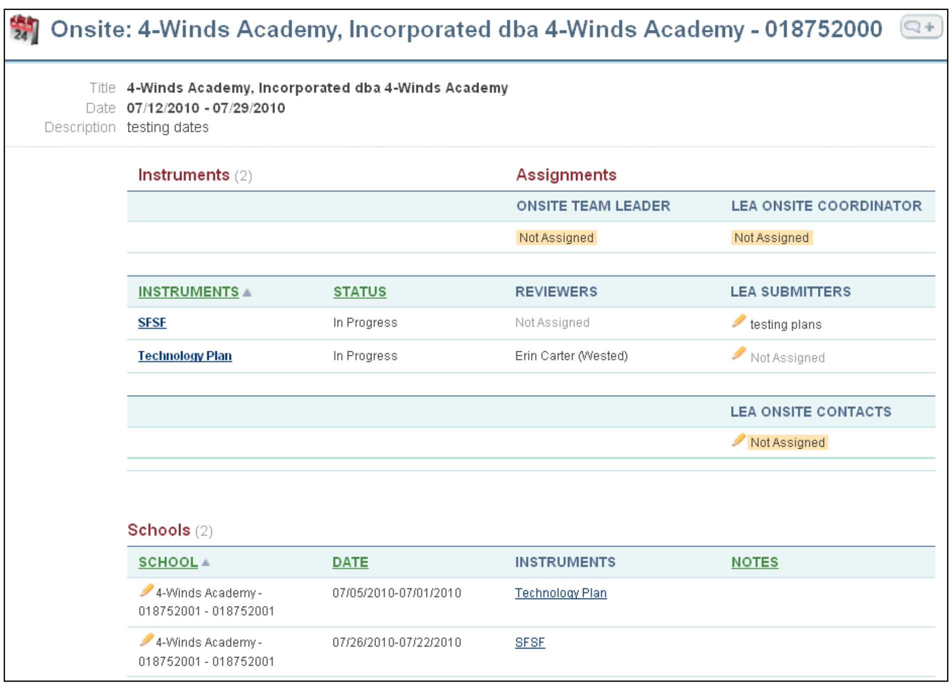
To view the LEA List if it is not your default home page, click the Home tab.

To change the default year, select a school year from the drop-down list 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 previous year



Onsites

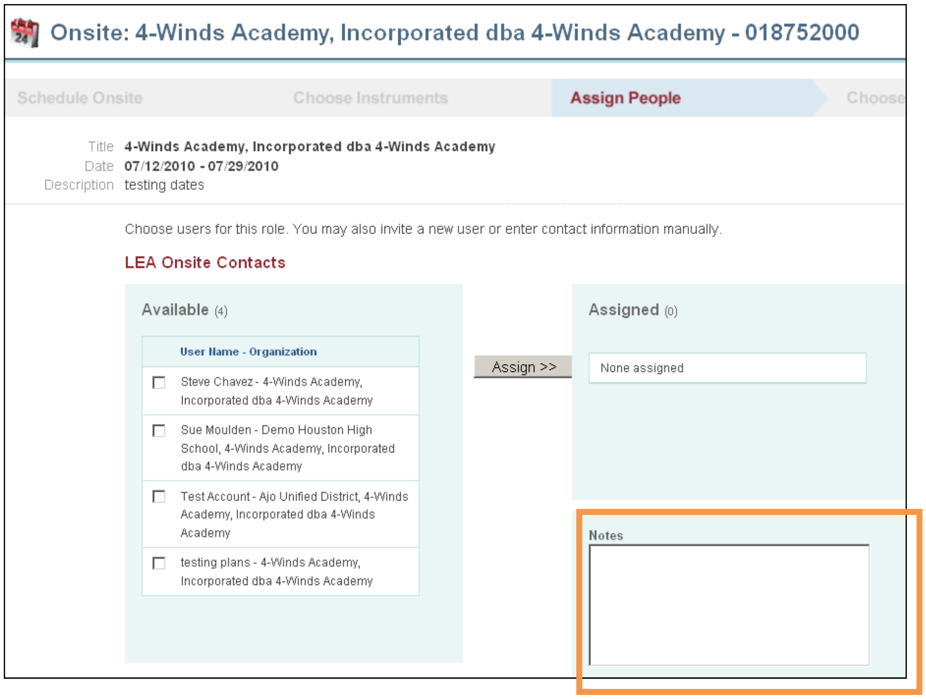
The Onsites section is a place where the state and the LEA can coordinate important information about monitoring onsite visits. If the state has assigned an onsite visit for the current year, this will be displayed on the LEA Overview screen. Click the onsite name to view the record. All information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



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

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

Additional LEA Onsite contacts may also be added or modified by LEA Admins by clicking the pencil icon. Select any available LEA users to add to the Onsite Contacts list. You may provide an optional note about these contacts.



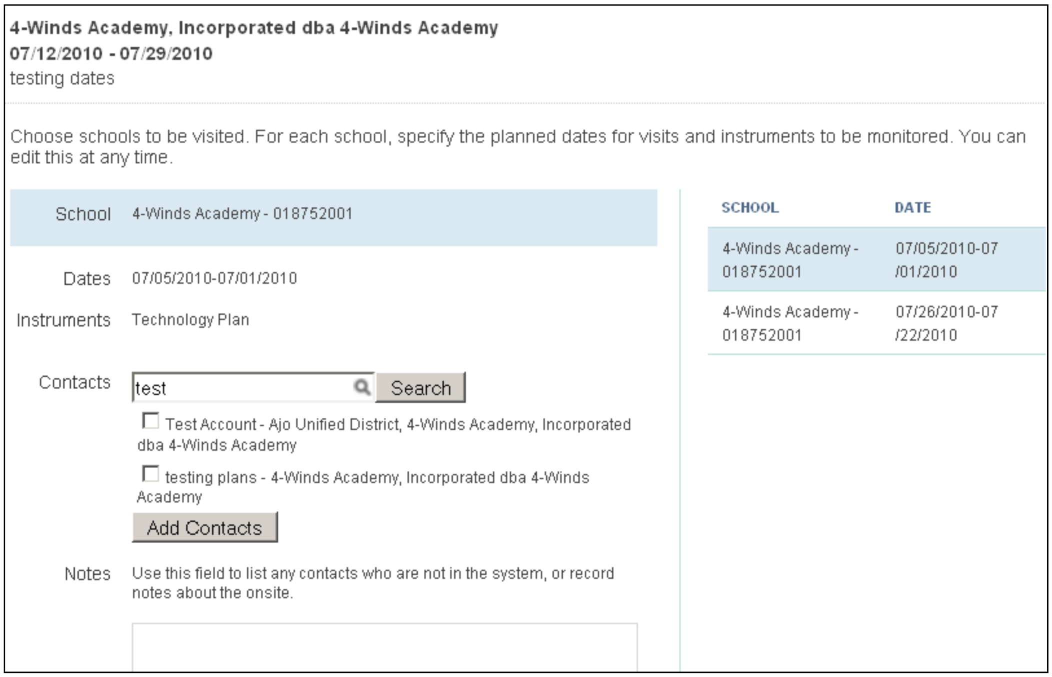
The schools that are being visited as part of the onsite visit are shown at the bottom of the record.

Schools (2)

SCHOOL	DATE	INSTRUMENTS	NOTES
4-Winds Academy - 018752001 - 018752001	07/05/2010-07/01/2010	Technology Plan	
4-Winds Academy - 018752001 - 018752001	07/26/2010-07/22/2010	SFSF	

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 PMT 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 **Done** to save.



Commenting

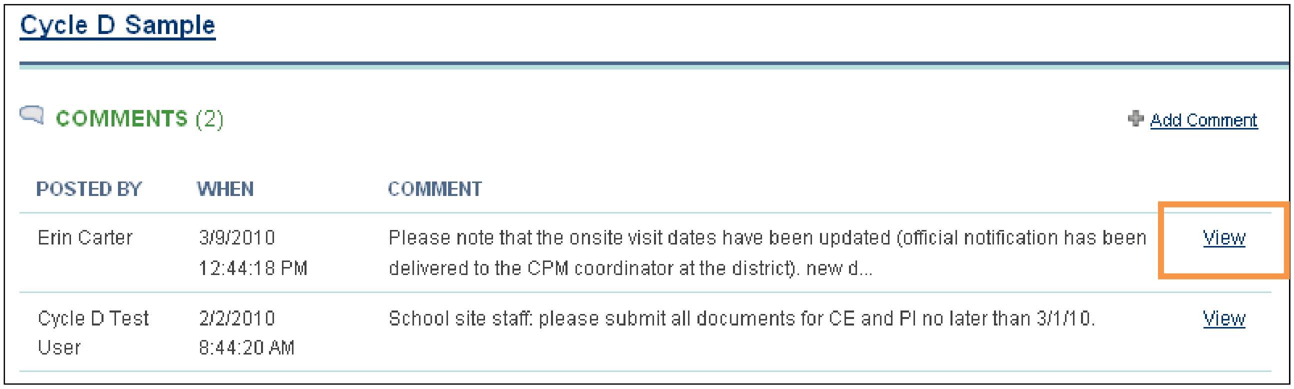
Comments facilitate communication among PMT users. Regardless of email notification, comments may be viewed by any user with access to the associated element. Throughout the system, the comment icon indicates that commenting is available at that element.

The following elements of the system currently feature a comments option:

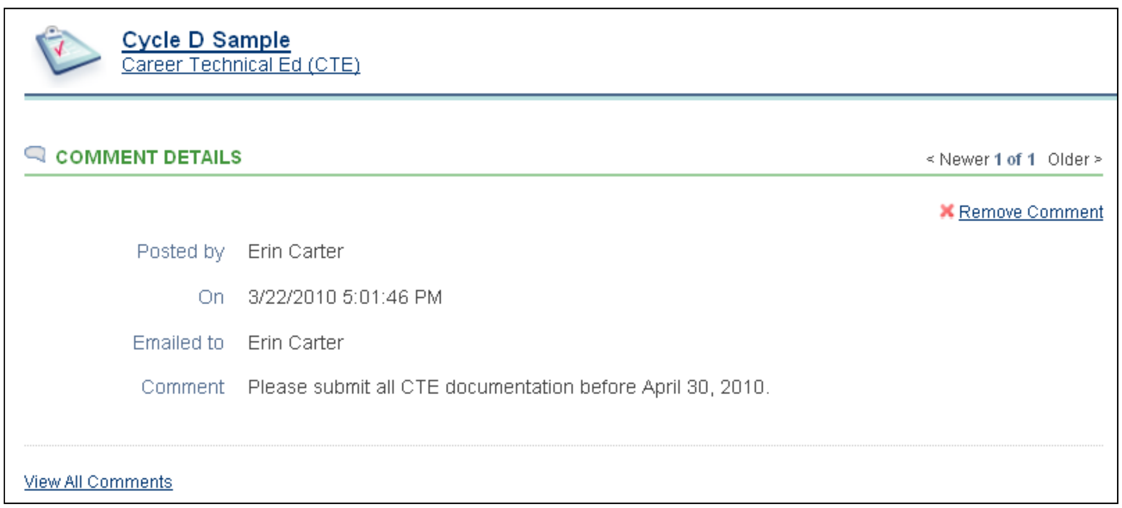
- The LEA Overview (comments at the LEA level)
- Onsite page (comments about the onsite visit)
- Monitoring Instrument Overview (comments at the Instrument level)
- Monitoring Item page (comments at the item/indicator level)
- Plan Overview page (comments about the plan)
- Plan Goals (comments at the 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

When comments exist for any element of the system, a number will appear in the comment icon. Click the icon to view all comments. 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.

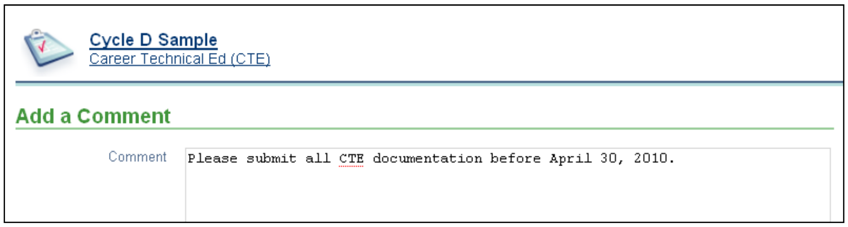


The view comment page shows all details and includes options for paging through other comments for the element or returning to the full list. You may click any of the links in the navigation options at the top. In Monitoring comments, you can return to the LEA Overview by clicking the district name or return to the Instrument Overview or Item page by clicking its name at the top of the screen.



Add Comment

Click the Comment icon to view existing comments at that element and/or add a new comment. If no comments exist yet for the selected element, you will go 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. This is what will appear in the view of the comment. Click **Post** below to add the comment to the system.

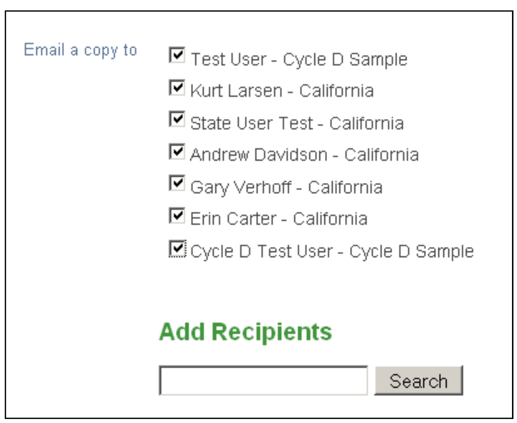


Email option

The **Add Recipients** section below the Comment entry field allows you to add individual users who will also receive an email 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. Default recipients are listed for the following comments:

- Monitoring Instrument or Item: designated Team Leaders, State Reviewers and District Submitters will be listed
- Plan Action Steps or Tasks: users set up as the Personal Responsible for that plan element will be listed
- In states where a plan approval process is in place, comments at the overall Plan level: Submitters and Approvers 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 to view matches. Users can be other users at the school or district or any known individuals at the SEA.

Find the user(s) you want to notify and check the box next to the names you want to send an email to. Click **Add checked to recipients** to add to the list of users who will be notified by email when the comment is saved. 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 email(s).

Putting Your Plan Online

Your Plan Leadership Team will likely want to initially write your Plan offline. Your Plan is a living document, so when entering your Plan into PMT, you can save your work at any point, and come back and edit any parts of your Plan later, as needed.

For entering Plan information into PMT, it is recommended that you have an electronic copy of your Plan (such as a Word document) rather than a paper version. This will make it easier for you to copy and paste detailed information from your Plan into PMT.

Plan Organization

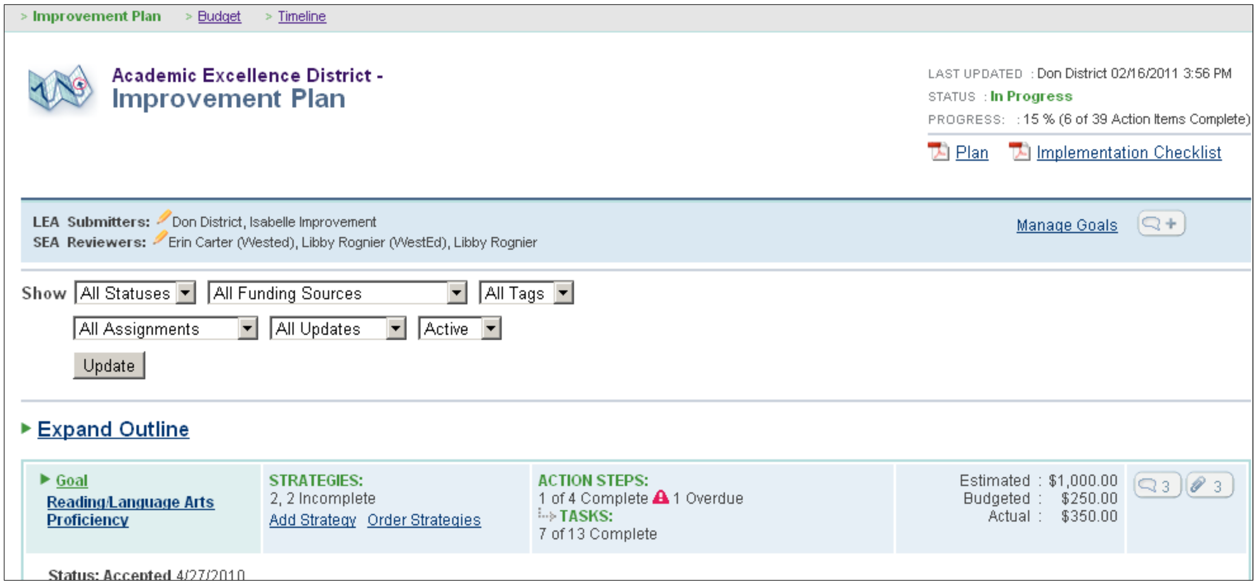
PMT uses a tiered structure for your Plan: Goals, Strategies, and Action Steps. You may also add specific Tasks to Action Steps. You will also create a Budget for your plan, and can track expenses as you implement the Action Steps

Goal	A specific, measurable target for students to achieve. States Who will do What by When and How you will know it. (You may write them in SMART format: Specific and Strategic, Measurable, Achievable/Attainable, Results-oriented, and Time-bound.) You may also select Goals from your District's plan, and re-write them to reflect your school's achievement target.
Strategy	A general description of a process a school will take to reach the student achievement goal. Each Goal may have several Strategies. What will the school do to ensure that the goal is reached?
Action Step	A specific action or activity that will lead to the implementation of the Strategy and achievement of the Goal. The Action Step includes begin and end dates plus comments on timelines, persons responsible, costs and budget sources for each Action. Progress is tracked by updating status and adding comments as the step is implemented. Action Steps may also be "tagged" for filtered views of the plan, e.g. all steps affecting Special Education students, or all steps involving PD. Each Strategy may have several Action Steps.
Task	A specific action/activity that leads to the completion of an Action Step. Tasks have specific due dates, persons responsible and current status. Each Action Step may have multiple tasks. Tasks are optional

Plan Overview Page

From your LEA Overview page, click title of the Plan in the Improvement Plan box on the right or the Plan tab at the top to see your LEA Plan page. If a plan approval process is used in the state, you may click on any individual Goal name to go to that part of the plan.

The Default view of the Plan Overview shows all of the goals in your plan. To expand your plan and see the strategies, action steps and tasks, either click the **Expand Outline** link to expand the entire plan, or click the green triangles at each level to reveal the next level below. Your Plan Overview allows you to access and edit any part of your plan, attach documents or add comments within your plan, see at a glance the due dates for tasks, and what is overdue.

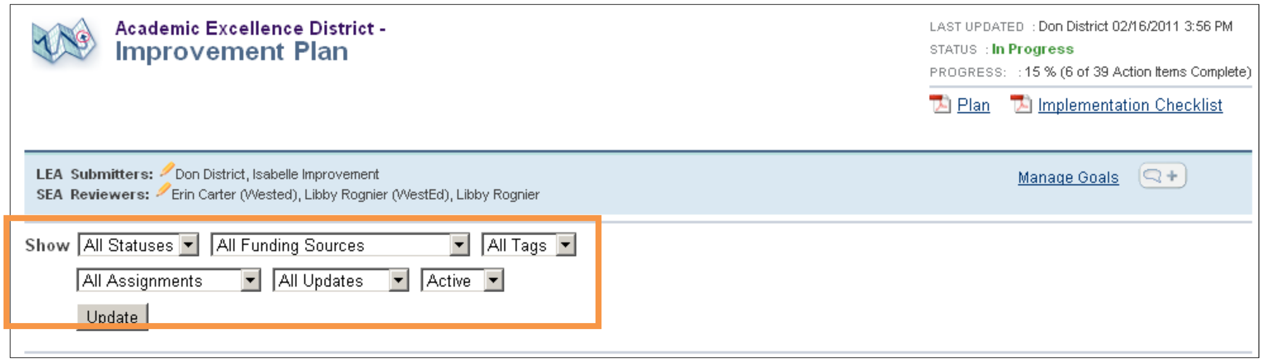


Plan Outline

The PDF links at the top of the Plan allow you to create and print reports based on the content of your plan. You may either print a full or filtered view of the Plan Outline (Plan link) or create an Implementation Checklist report, which shows the status history of all Action Steps and their associated Strategies and Goals.

The last update information and current status of the plan appear at the top, as well as a summary of progress in completing action steps.

You may filter the plan by Status of Action Steps, Funding Source, Tag, Person Responsible or by when the plan was last updated. You may also show all Active or all Retired portions of the plan. Retiring elements will be covered later in this guide.



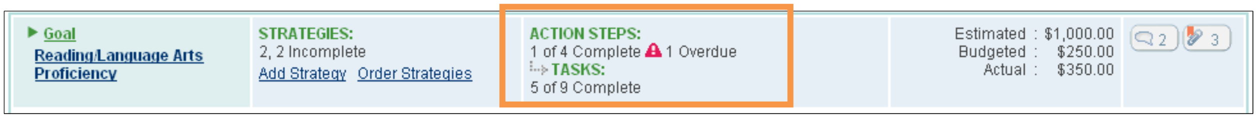
Once you select the desired filter options, click **Update** to refresh the Plan Outline to see the updated view. When filters are applied, only those portions of the Plan contained within the filter parameters will show on the overview or print in a report.

Setting Action Step statuses and tags will be covered later in this guide.

Note: When you have a custom filter applied, that filter will stay active, even after navigating away from the Plan Overview page and returning later. If you wish to remove your custom filter, click the **Clear Filters** button. Selecting the **Plan** or **Implementation Checklist PDF** when a custom filter is active will print the filtered version of the Plan.

Plan Status

As you move down the Plan Overview screen, you will see Status indicators for parts of the Plan that are complete, incomplete, and overdue. These indicators can help you see at a glance those areas of your Plan that need attention.



The Goal Status line shows the name of the Goal on the left, followed by the number of Strategies and associated functions. Action Step and Task status data is next, with Budget information displayed on the far right. The Budget information is “rolled up” from the values entered for all Action Steps under that particular Goal.

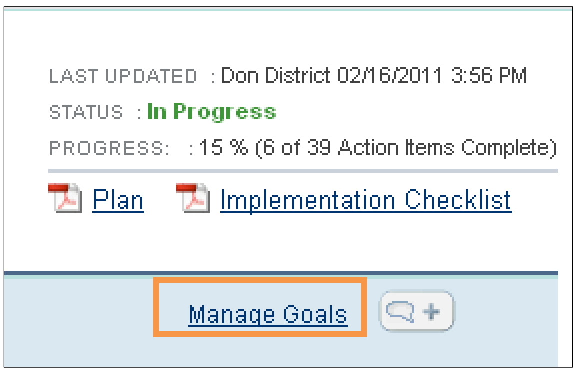
The Comment and Attachment icons indicate how many of each are associated with this Plan element. Hovering over the paperclip gives you a list of all documents linked to this element. Clicking on the icon allows you to add an attachment or a comment at any level within the Plan (Goal, Strategy, or Action Step.)

Entering Plan Data

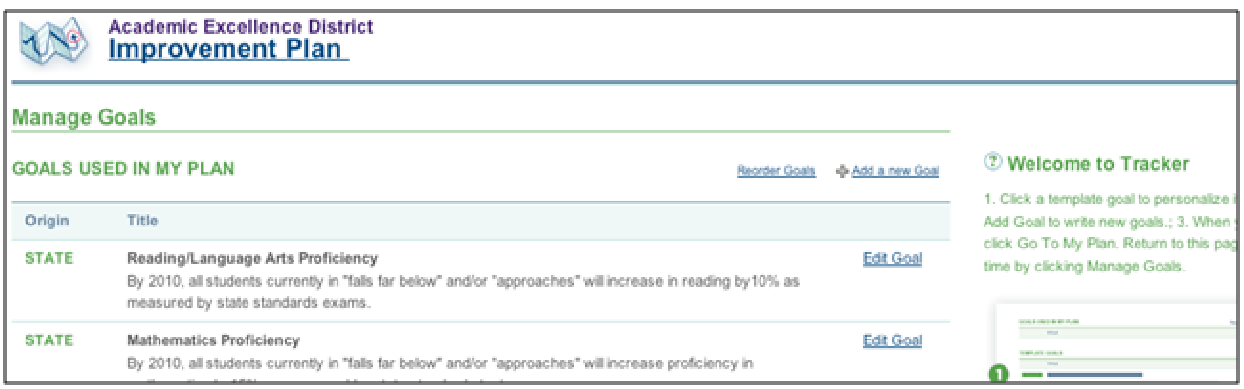
This section will review how to Add new data to your Plan (Goals, Strategies, Action Steps, Descriptions, etc.) and Edit that data once it is in the system.

Goals

Your SEA may have assigned common Goals to all LEAs in the state. If so, these will appear in your plan, ready to be edited with your Goal description specific to your LEA. You may also wish to add goals unique to your LEA. Only LEA Administrators may add new Goals to the Plan. All Users can edit existing Goals, and add Strategies, Action Steps and Tasks. To Add a Goal, click on the **Manage Goals** link. (If you are not an Administrator, you will not see this link.)



On the Manage Goals page, you will see a list of current goals in your plan.

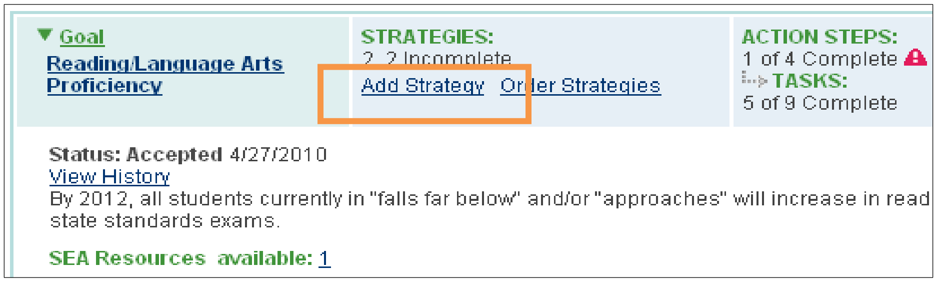


The Origin indicates at what level the Goal was first entered into PMT. Some states create Goals that are assigned to all districts. If you add a new goal, you will give it a Title and Description unique to your LEA Plan. The origin will appear as District. You may also re-order goals in your plan.

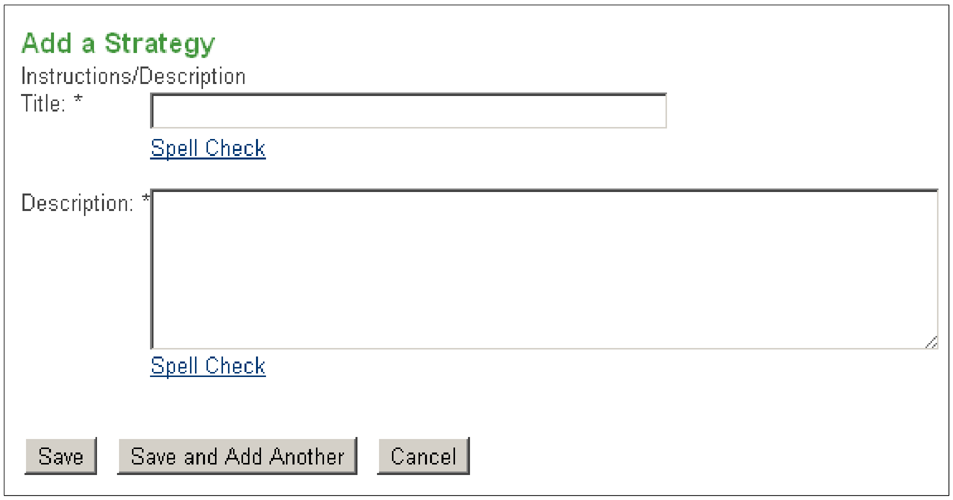
Once the Administrator has added Goals to the Plan, Users may edit the Goal language, but may not delete nor reorder the Goals.

Strategies

The next step is to add Strategies. You may add as many Strategies as necessary to successfully achieve your Goals. To do so, click the **Add Strategy** link in the Goal Preview section.

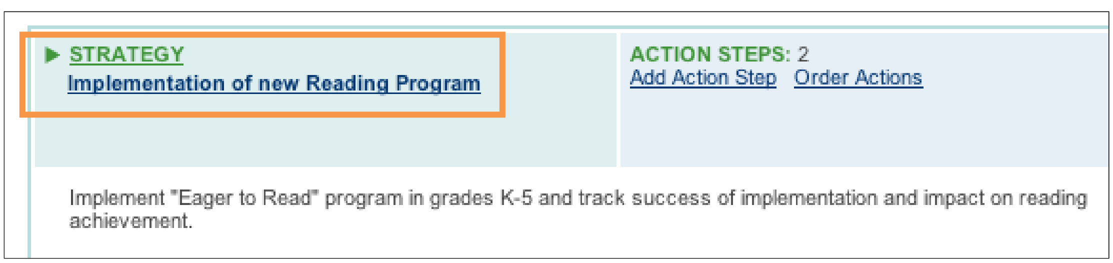


The Strategy entry screen will appear.



For each new Strategy, enter a short Title as a reference for the activity you are describing. For the Description, you may be more specific about what will happen and who will participate. When you are finished, press **Save** to continue or **Save and Add Another** to add additional strategies for this goal.

Once a Strategy is created, you can modify it by clicking the Strategy title link on the Plan Overview screen.

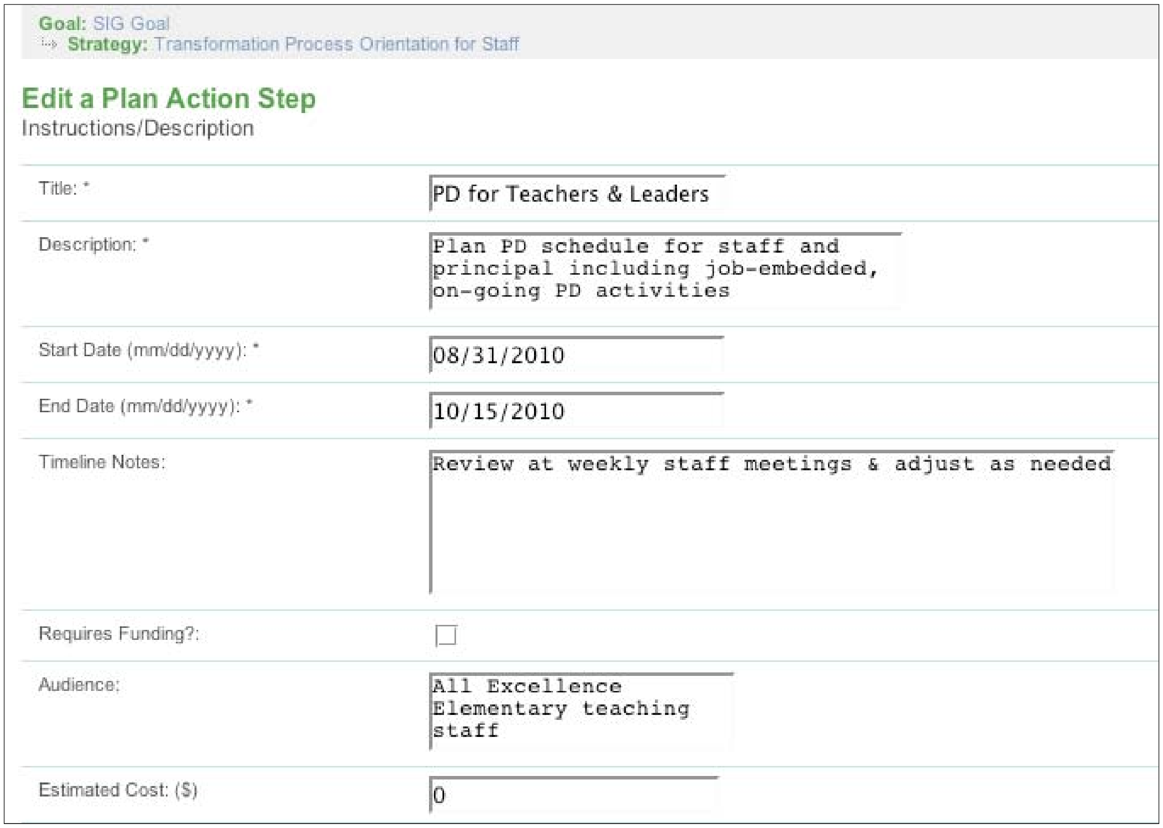


Action Steps

After you create a Strategy, you can add specific Action Steps that outline what needs to be done. Action Steps should be reasonable steps needed to accomplish a Strategy, leading to the achievement of a Goal.

On the Plan Overview screen, in the Strategy box, click the **Add Action Step** link.

The Add an Action Step screen will appear.


Goal: SIG Goal
Strategy: Transformation Process Orientation for Staff

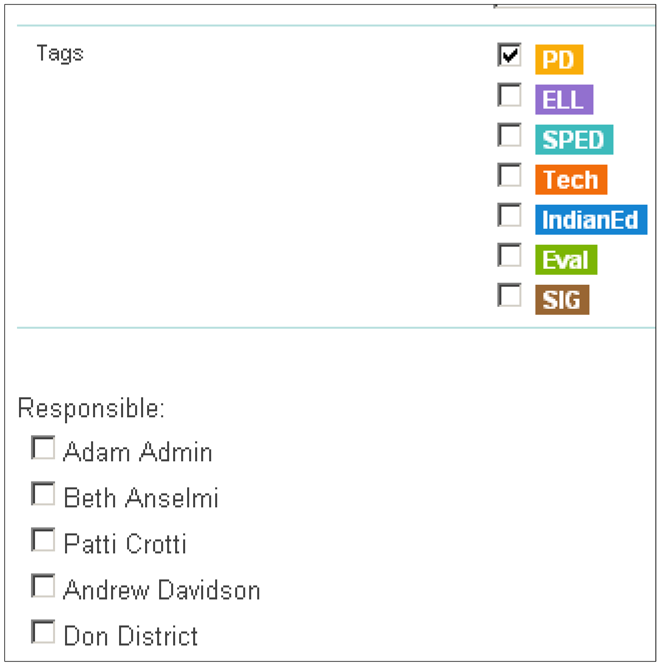
Edit a Plan Action Step
Instructions/Description

Title: *	PD for Teachers & Leaders
Description: *	Plan PD schedule for staff and principal including job-embedded, on-going PD activities
Start Date (mm/dd/yyyy): *	08/31/2010
End Date (mm/dd/yyyy): *	10/15/2010
Timeline Notes:	Review at weekly staff meetings & adjust as needed
Requires Funding?:	☐
Audience:	All Excellence Elementary teaching staff
Estimated Cost: ($)	0

The fields with * are required. If the Action takes place over a long period of time, you may want to add **Timeline Notes** (e.g. Once per week for 10 weeks.) If the Step requires funding, enter an **Estimated Cost**. You will come back later to specify the budget source(s) and Actual costs. All Budget amounts assigned to Action Steps total up to the Strategy and Goal levels on the Plan Overview.

Scrolling down the page, you may check one or more **Tags** to appear on the Action Step. Tags designate special programs or populations that are associated with the Action Step (e.g. Professional Development (PD) or English Learners (EL).) Putting Tags on Action Steps allows you to filter the plan for specific designations in the Plan Overview. For example, you may want to see all of the PD activities throughout the plan in order to organize the year's PD schedule for the school.

Finally, you may check one or more persons who are **Responsible** for implementing this Action Step. A list of everyone associated with your plan will appear for you to check off the appropriate names.



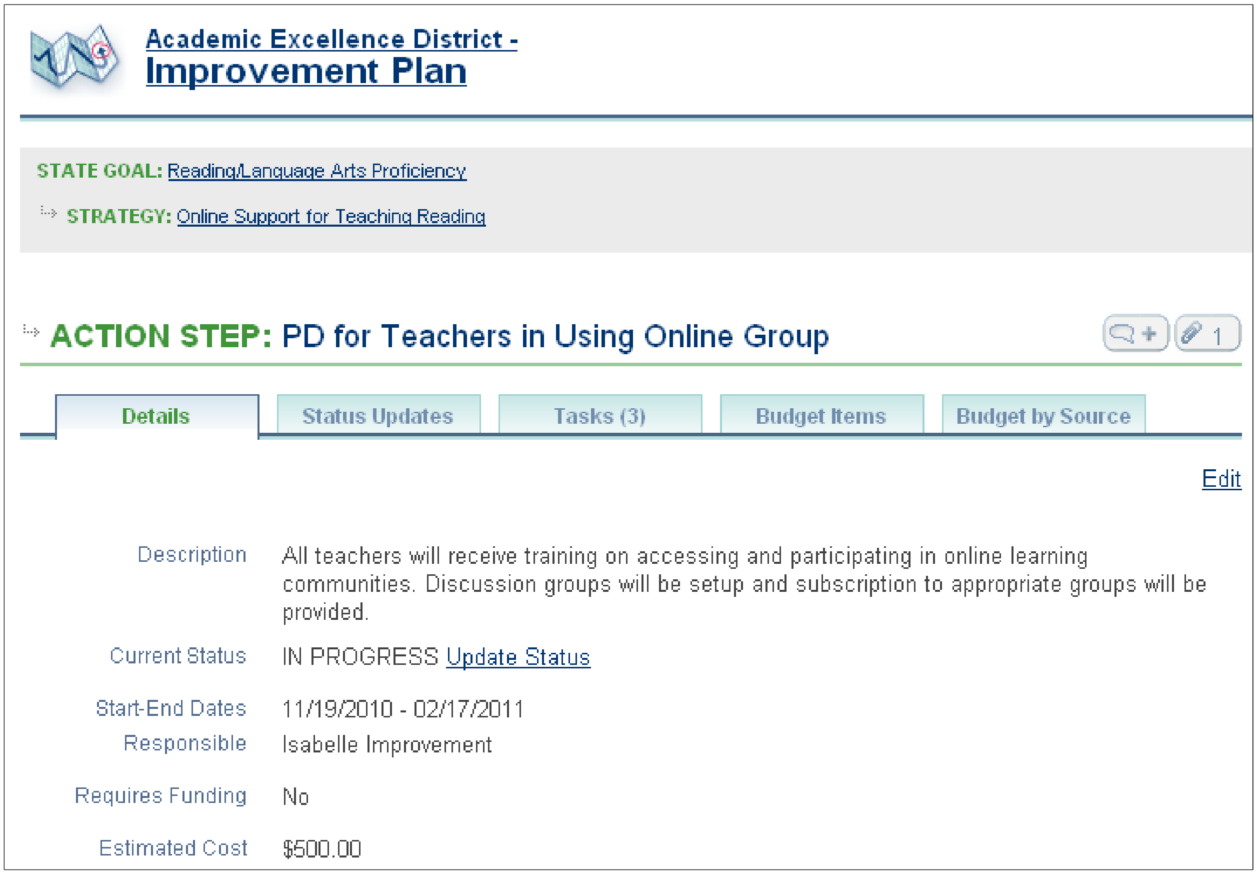
Click **Save** to continue or **Save and Add Another** to add additional action steps to this strategy.

Below is an explanation of each field on the Action Step detail screen.

Title	Short title of the Action Step. Maximum characters is 50.
Description	Detailed description of the Action Step. Maximum characters is 1000.
Start Date / End Date	These dates will be graphed on the Timeline and will trigger reminder icons on the Plan Overview to show which Items need attention.
Timeline Notes	(Optional) Notes that will appear in the Timeline regarding the regarding this Action Step. Maximum characters is 250.
Requires Funding	Check this box if the Action Step requires funding.
Audience	Use this field to enter who would need to attend any Professional Development activities, if necessary.
Estimated Cost	The estimated cost of completing the Action Step. These amounts feed the Budget Summaries, and total up to the Estimated Costs for each Strategy and Goal. When you add the Actual spent for the Action Step, that will also be reflected in the total budgets for each Strategy and Goal.
Tags	Check the appropriate tags that apply to the Action Step. These tags are used for filtering purposes on the Plan Overview and when generating reports.
Responsible	Designate one or more person responsible for the implementation of this Action Step.

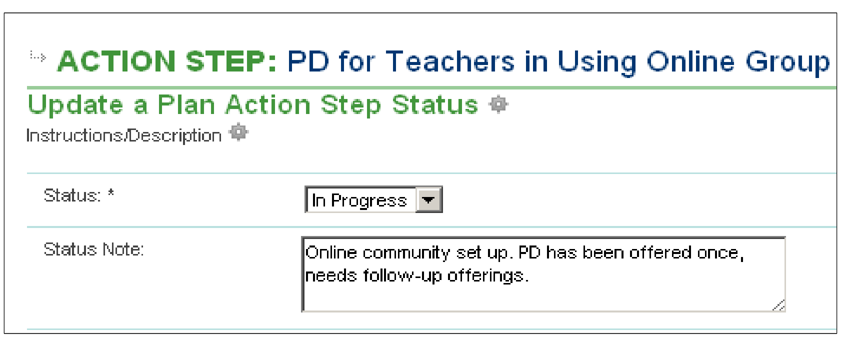
Action Step Overview

Once an Action Step is created, the Action Step Overview is displayed. This screen allows you to add additional information to the Action Step, such as Status Updates, Tasks and Budget Items.

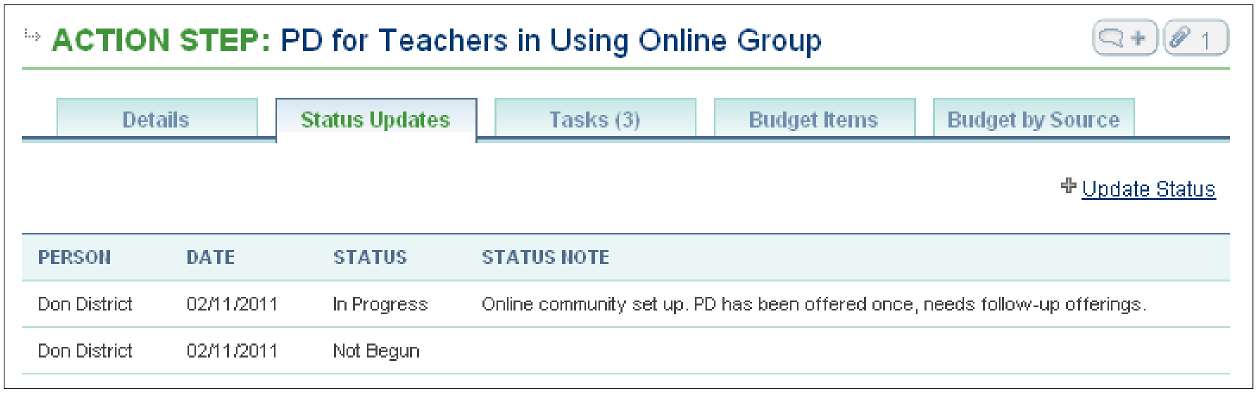


This is where the Plan implementers will come in to update their progress toward completing the Improvement Plan, adding Status Updates, marking Tasks as Completed, and recording Actual Budged amounts spent.

On the Details tab, click the **Update Status** link to make an update to the action step status. Select a new Status and enter an optional Status Note. Click **Save**.



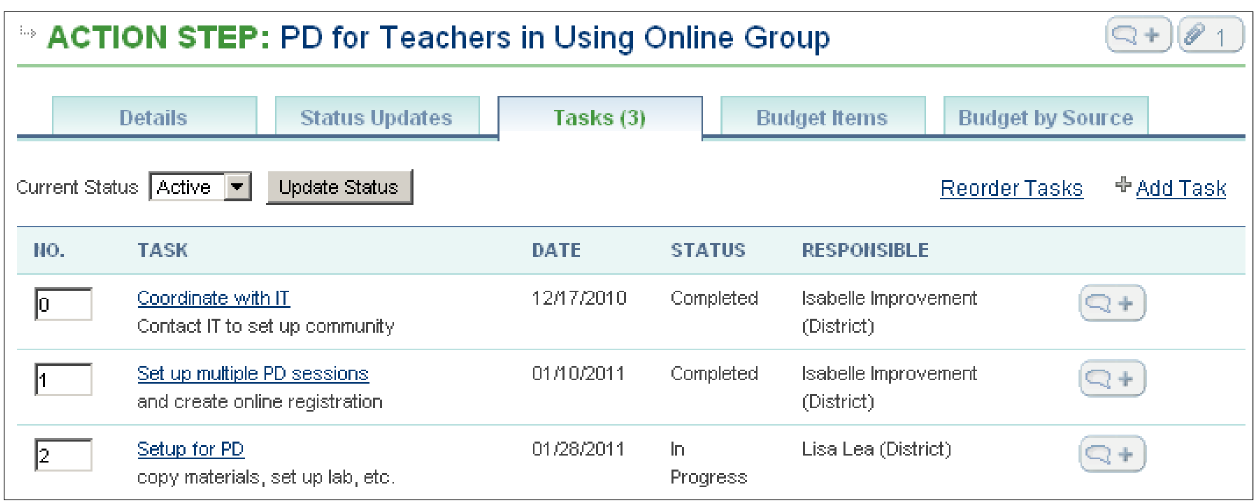
On the Status Updates tab, PMT will keep track of the date of each update, who entered it, and what the status was at that point. This provides a chronology for all Plan viewers to note progress and results of actions taken. The Status Updates are intended not only to report on progress toward completion of the Plan, but also to provide a thoughtful review of the effect of Actions taken, and any adjustments recommended to accomplish the Goals. Describing in detail what has been done, what the effects have been, and what will be done next will strengthen your Plan.



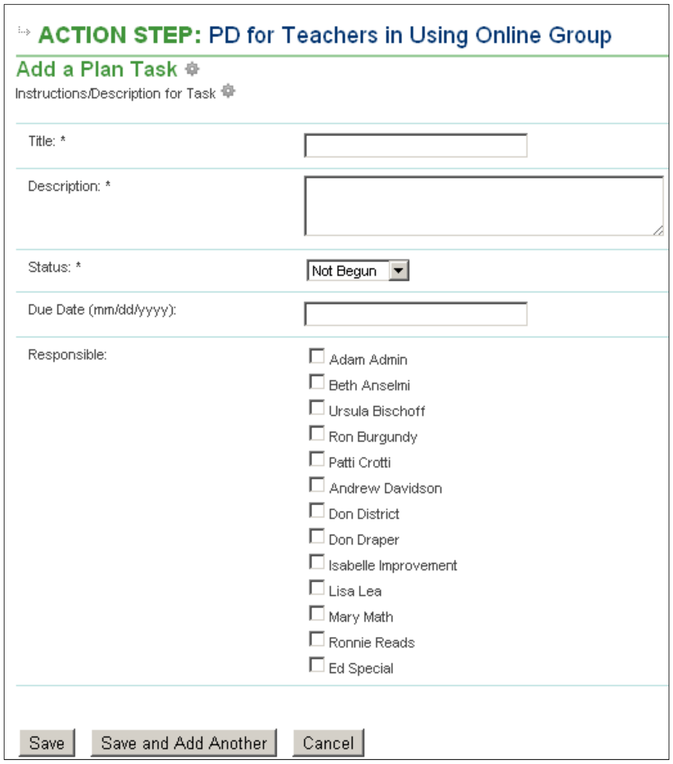
Tasks

Once an Action Step is created, you may want to break it up into smaller, specific Tasks. Although creating Tasks is optional, you may find them helpful to keep track of who is responsible for each part of the Action Step implementation. Tasks will appear in the Plan Overview with their due dates to help keep you on track for implementing your Plan.

Click the Tasks tab on the Action Step page to view existing tasks or create a new task.



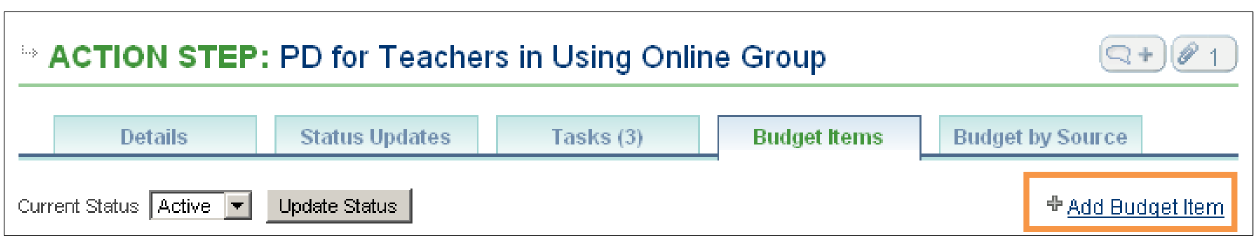
You may reorder the tasks by adjusting the order number on the left and clicking the **Reorder Tasks** link at the top. To view Retired tasks, select **Retired** in the Current Status menu and click Update Status. Click **Add Task** to add a new task to the action step. Fill out the required fields and any other details such as the person responsible for the task.



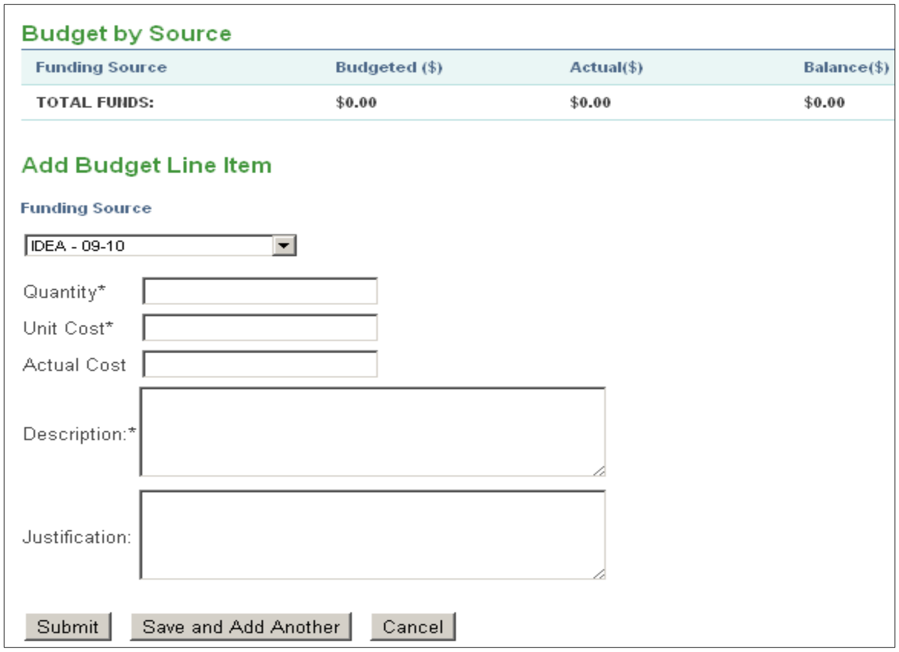
Click **Save** or **Save and Add Another** if you have additional tasks to add to this action step.

Action Step Budget Items

If your Action Step requires funding, you can estimate costs, and budget from which funding source the money will be applied. To Add a Budget Line Item, select the **Budget Items** tab on the Action Step Overview screen and click **Add Budget Item**.



The Budget Item detail page will appear.



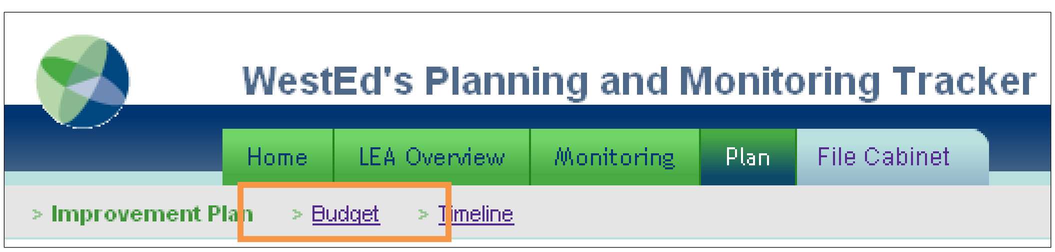
At the top of the screen, a table of funds already allocated to this Action Step is displayed to help you determine where to pull the funding from for your new Budget Item. (This information is also displayed on its own tab on the Action Step Overview). Below that, you can choose your Funding Source (see Budget section later in this Guide) and enter the Quantity of what you are purchasing, Unit Cost, Actual Cost, Description and Justification (if needed).

This amount will show on your Action Step Overview, and the total amounts allocated for all Action Steps will roll up to the Strategy and Goal levels of your Plan.

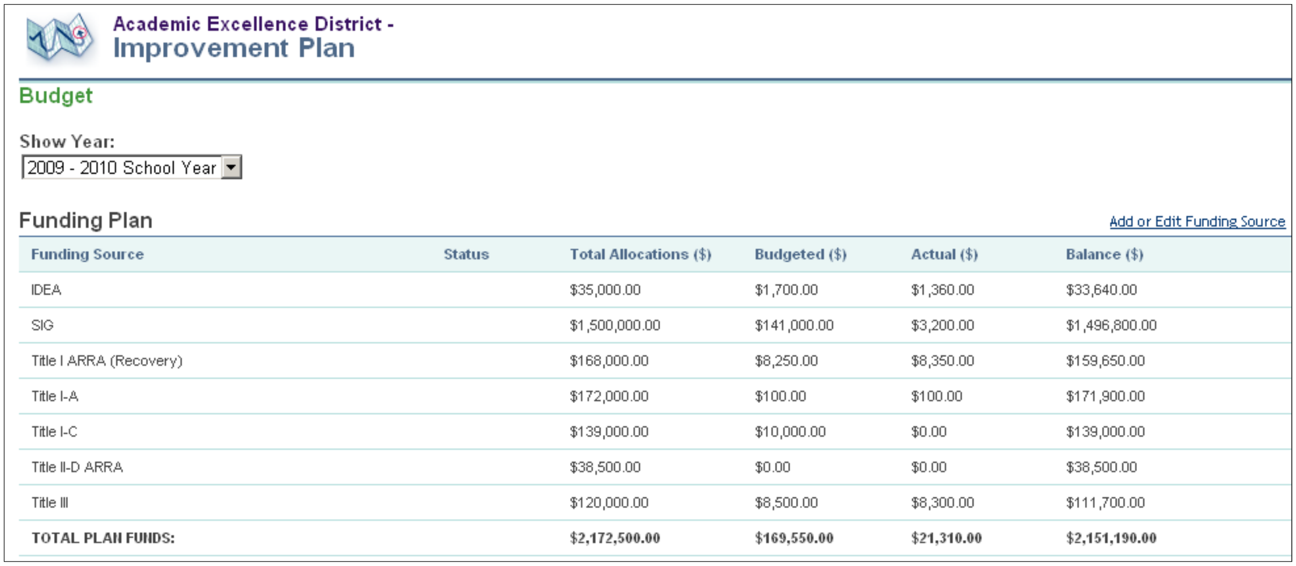
When you complete the Action Step, you can return to each Budget Item to record the Actual Cost of the activity. PMT will track what funds you have available, what you have estimated will be spent throughout your Plan, and what you actually spent.

Budget

The Budget section provides an area where you can identify all available funds that you will use to complete your Plan. You can view your complete budget by clicking on the **Budget** link under the main navigation tabs.



The Budget Overview screen will appear.



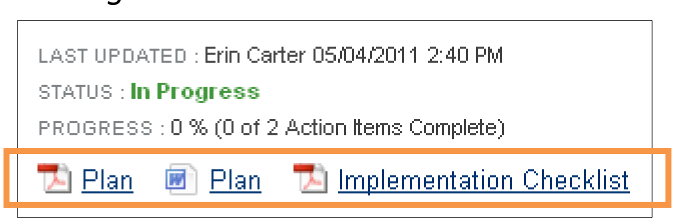
Funding Source	Status	Total Allocations ($)	Budgeted ($)	Actual ($)	Balance ($)
IDEA		$35,000.00	$1,700.00	$1,360.00	$33,640.00
SIG		$1,500,000.00	$141,000.00	$3,200.00	$1,496,800.00
Title I ARRA (Recovery)		$168,000.00	$8,250.00	$8,350.00	$159,650.00
Title I-A		$172,000.00	$100.00	$100.00	$171,900.00
Title I-C		$139,000.00	$10,000.00	$0.00	$139,000.00
Title II-D ARRA		$38,500.00	$0.00	$0.00	$38,500.00
Title III		$120,000.00	$8,500.00	$8,300.00	$111,700.00
TOTAL PLAN FUNDS:		**$2,172,500.00**	**$169,550.00**	**$21,310.00**	**$2,151,190.00**

The Budget Overview allows you to select the desired school year using the dropdown list. The existing funding sources, along with their Total Allocations, Budgeted and Actual amounts, and remaining Balance.

To add a funding source, click the **Add or Edit Funding Source** link at the top of the screen. The Add Funding Amount screen will appear.

Choose the Year and Program from the dropdown lists, then enter the funding amount. When finished, click **Save** to continue. As you continue to add Funding Amounts, your Total Plan funds will reflect all sources available for your Plan.

Printing the Plan



You can print the Plan by selecting any of the options at the top right of the Plan Overview.

PMT will generate a report that includes any filters that are currently active. So if your Plan is currently filtered to just display the Goals and Strategies with Action Step statuses of ‘Complete’, that is what the report will display.

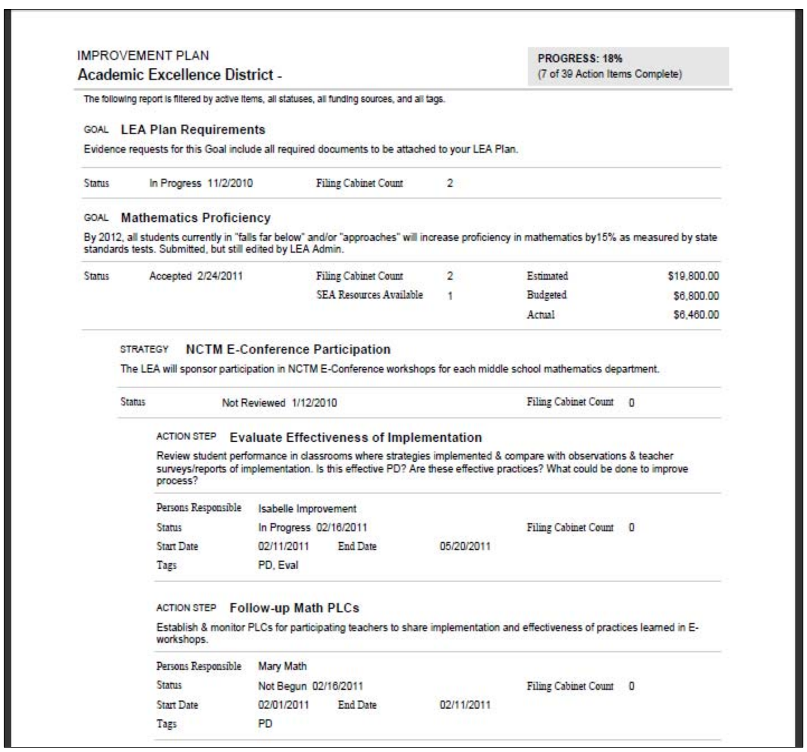
There are two reports available: one of the entire Plan Overview (available in PDF and Word), and an Implementation Checklist report, which shows the Status history of each Action Step

If your Plan Overview has active filters, you will see a **Clear** button next to the **Update** button. Simply click the **Clear** button to remove any filters and display the entire Plan.

After clicking the **Plan** PDF link, your browser will download a PDF of the Plan. The download location and how you access the PDF will depend on your individual browser and download settings.

An example of the Plan report is shown below.

The Plan title and status information is shown at the top, followed by the expanded view of the Goals, Strategies and Action Steps.


IMPROVEMENT PLAN
Academic Excellence District -

PROGRESS: 18%
(7 of 39 Action Items Complete)

The following report is filtered by active items, all statuses, all funding sources, and all tags.

GOAL LEA Plan Requirements
Evidence requests for this Goal include all required documents to be attached to your LEA Plan.

Status In Progress 11/2/2010 Filing Cabinet Count 2

GOAL Mathematics Proficiency
By 2012, all students currently in "falls far below" and/or "approaches" will increase proficiency in mathematics by15% as measured by state standards tests. Submitted, but still edited by LEA Admin.

Status Accepted 2/24/2011 Filing Cabinet Count 2 Estimated $19,800.00
SEA Resources Available 1 Budgeted $6,800.00
Actual $6,460.00

STRATEGY NCTM E-Conference Participation
The LEA will sponsor participation in NCTM E-Conference workshops for each middle school mathematics department.

Status Not Reviewed 1/12/2010 Filing Cabinet Count 0

ACTION STEP Evaluate Effectiveness of Implementation
Review student performance in classrooms where strategies implemented & compare with observations & teacher surveys/reports of implementation. Is this effective PD? Are these effective practices? What could be done to improve process?

Persons Responsible Isabelle Improvement
Status In Progress 02/16/2011 Filing Cabinet Count 0
Start Date 02/11/2011 End Date 05/20/2011
Tags PD, Eval

ACTION STEP Follow-up Math PLCs
Establish & monitor PLCs for participating teachers to share implementation and effectiveness of practices learned in E-workshops.

Persons Responsible Mary Math
Status Not Begun 02/16/2011 Filing Cabinet Count 0
Start Date 02/01/2011 End Date 02/11/2011
Tags PD

Plan Modifications

After you finish entering your Plan, you may go back at any time to make edits to a Goal, Strategy, Action Step or Task through the Plan Overview.

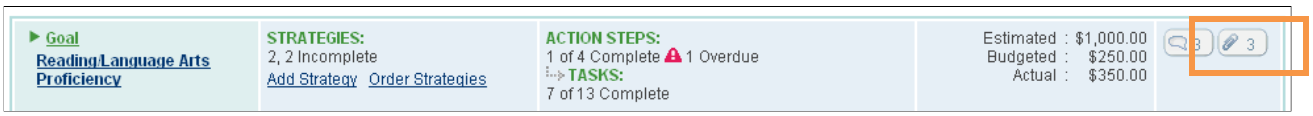
Once all Action Steps for a Strategy have been marked as Completed in the Status Update screen, the Strategy Status changes to Completed as well.

The status history of all action steps are shown in the Implementation Checklist report.

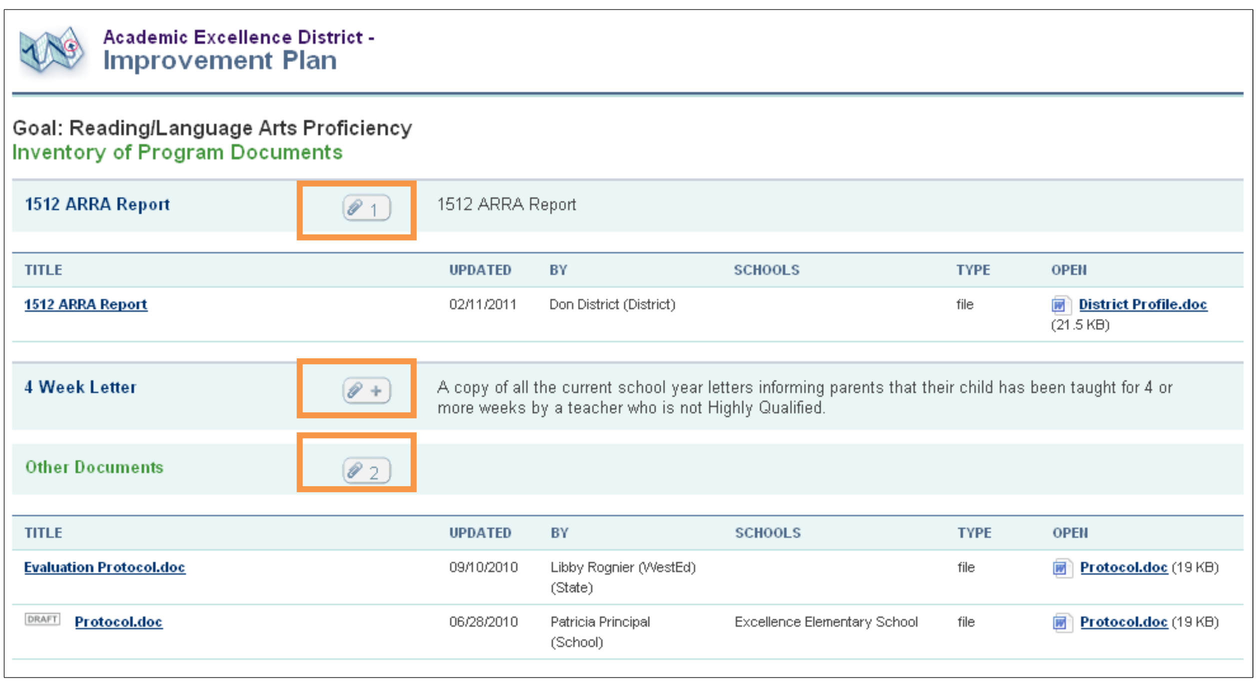
This can be a useful report for the Implementation Team to keep track of progress, or to show to Stakeholders who want to see what steps the school has taken toward improvement.

Attaching Documents

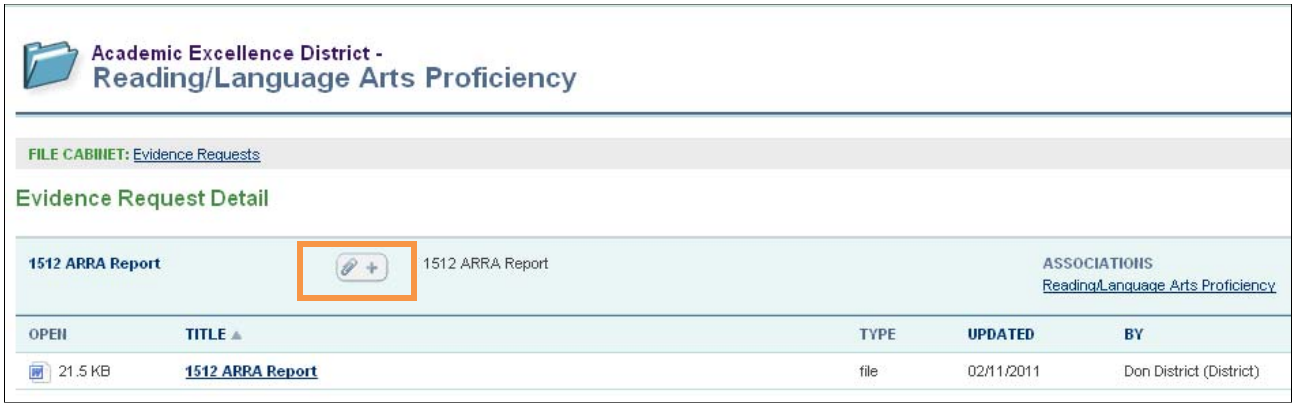
Wherever you see the paper clip document icon in the plan, you may access documents you have uploaded and/or attach a new document. If a plan component has documents already, a number will appear next to the document icon. Click the Attach Document button to begin.



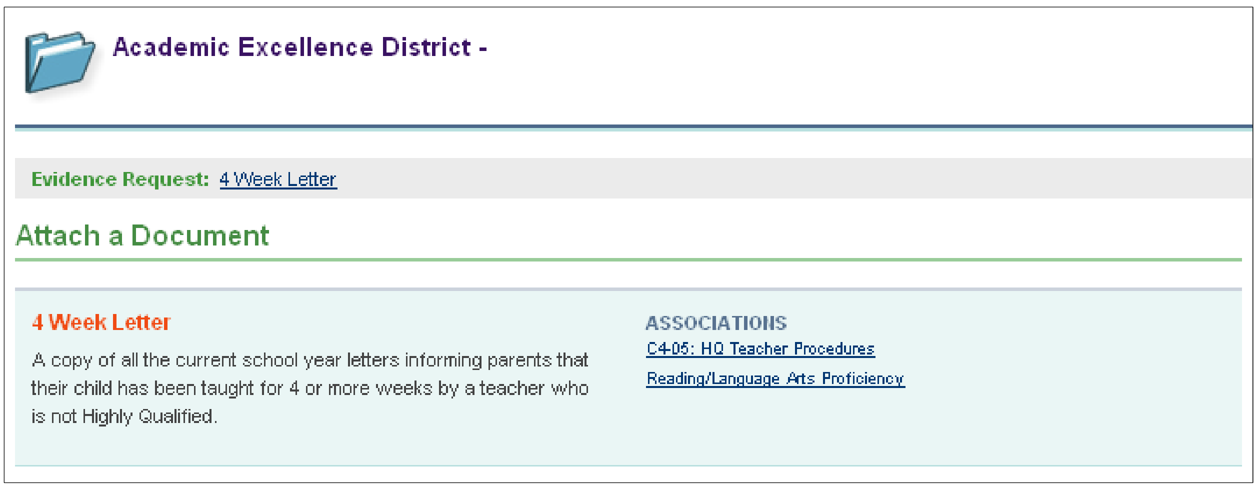
If documents have already been added to that area, they will appear on the next screen. If the Plan area has evidence requests, these will be shown. If you would like to add a document, click the **Attach Document** button next to either the evidence request or the **Other Documents** option.



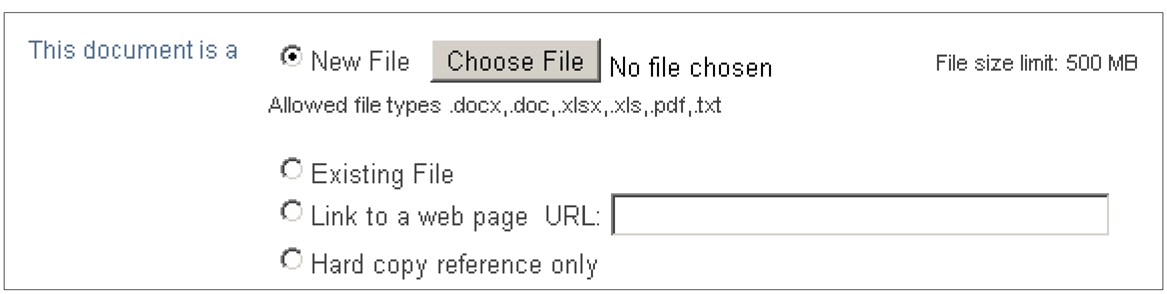
If attaching documents to a specific evidence request where documents have already been uploaded, you will first go the evidence request page showing description/instruction for the requested document and a list of all areas of both planning and monitoring where that request is made. All documents previously uploaded for the request will appear below. To upload additional documents, click the Attach Document button.



If uploading a document for a specific evidence request, the Attach a Document screen will display the evidence request name and description as well as all areas of planning and monitoring where the request is made.



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



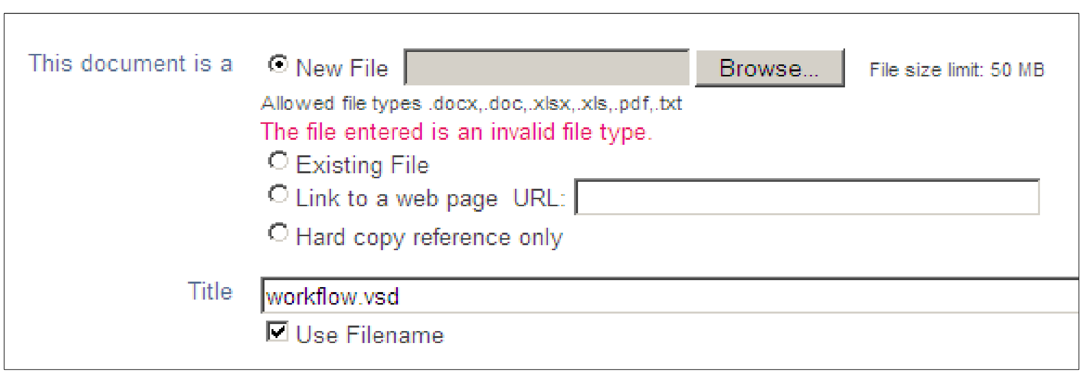
- Add a **New File** by browsing your computer and selecting the file to add. Provide a Title and Description. The default for the Title is the file name but you may uncheck this to create your own. Be sure to include file types that are generally able to be opened on most computers: Microsoft Office 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.

- Selecting an **Existing File** that has already been added by the LEA or School to the LEA File Cabinet or School 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. 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. Then click Attach to save.
- **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 district website where parent notifications are available. Add a URL, including “http://” to create the record. Provide a Title and Description of the web link.
- 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 state, 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.

File Guidelines

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.



Draft documents

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

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

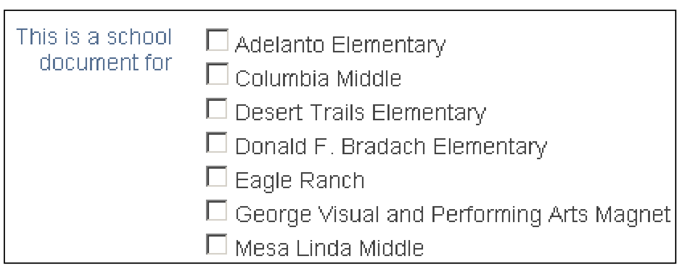
Please note that documents set as Draft (manually by District users or automatically for School users) will need to be individually un-checked as Draft before they may be reviewed by the state. This can require a lot of manual clean-up so it is encouraged to use the Draft status sparingly. If you have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

School Associations

A list of schools in the district 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 district. District 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.

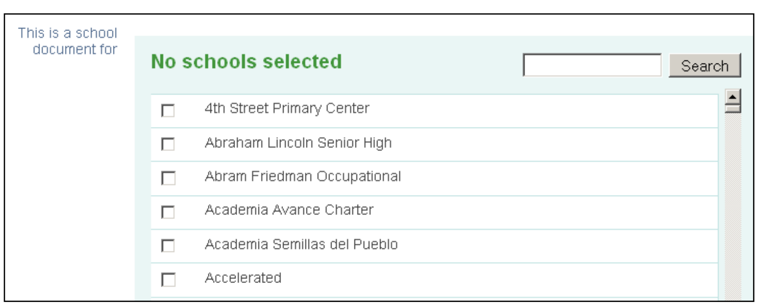
Depending on how many schools are in the district, you will see one of two views.

If all schools fit onto the bottom of the screen, they will all appear with checkboxes to select.



If all schools do not fit onto the bottom of the screen, the list will appear with a scroll bar and a search tool will also be provided.

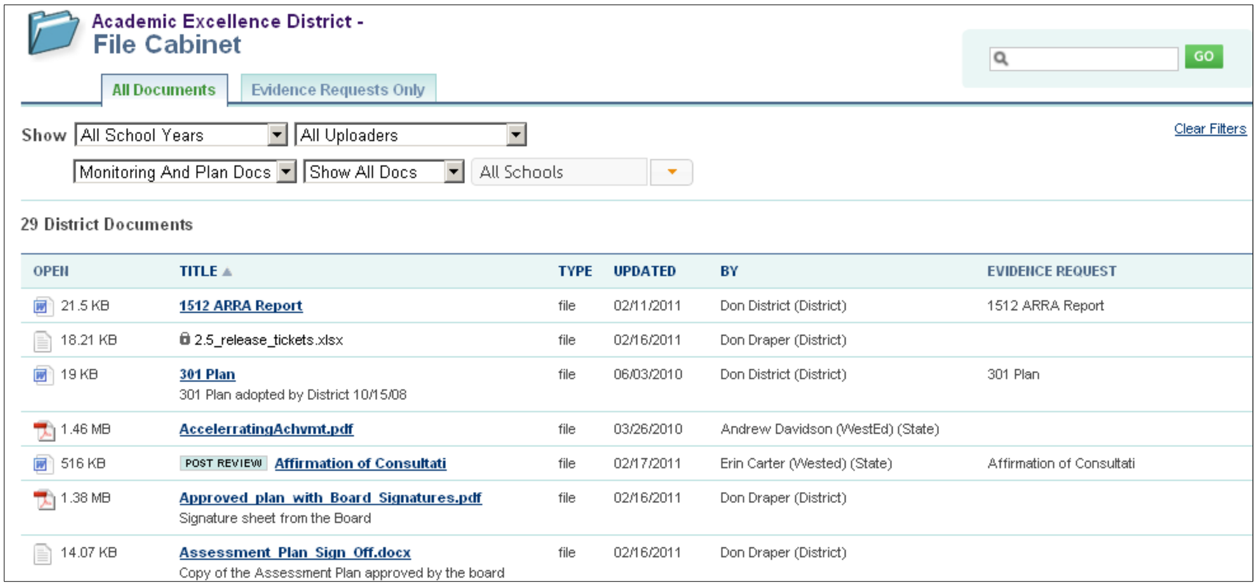
Check the box for the school(s) the document relates to.



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

Accessing Documents

All documents uploaded to PMT by the district will be contained within the File Cabinet, accessed by selecting the File Cabinet tab on the top navigation. To view specific documents for an individual plan or monitoring element, click the Attached Documents icon in that area.



The main File Cabinet has two separate views: All Documents and Evidence Requests Only. The All Documents tab has all documents currently uploaded into the file cabinet for either Plan or Monitoring activities, including specific evidence requests and files atttached to the Other Documents area. Data displayed includes:

- File size and file type icon
- Title and description
- Type
- Last Update
- Last Update By
- Evidence request name (if applicable)

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

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

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: 

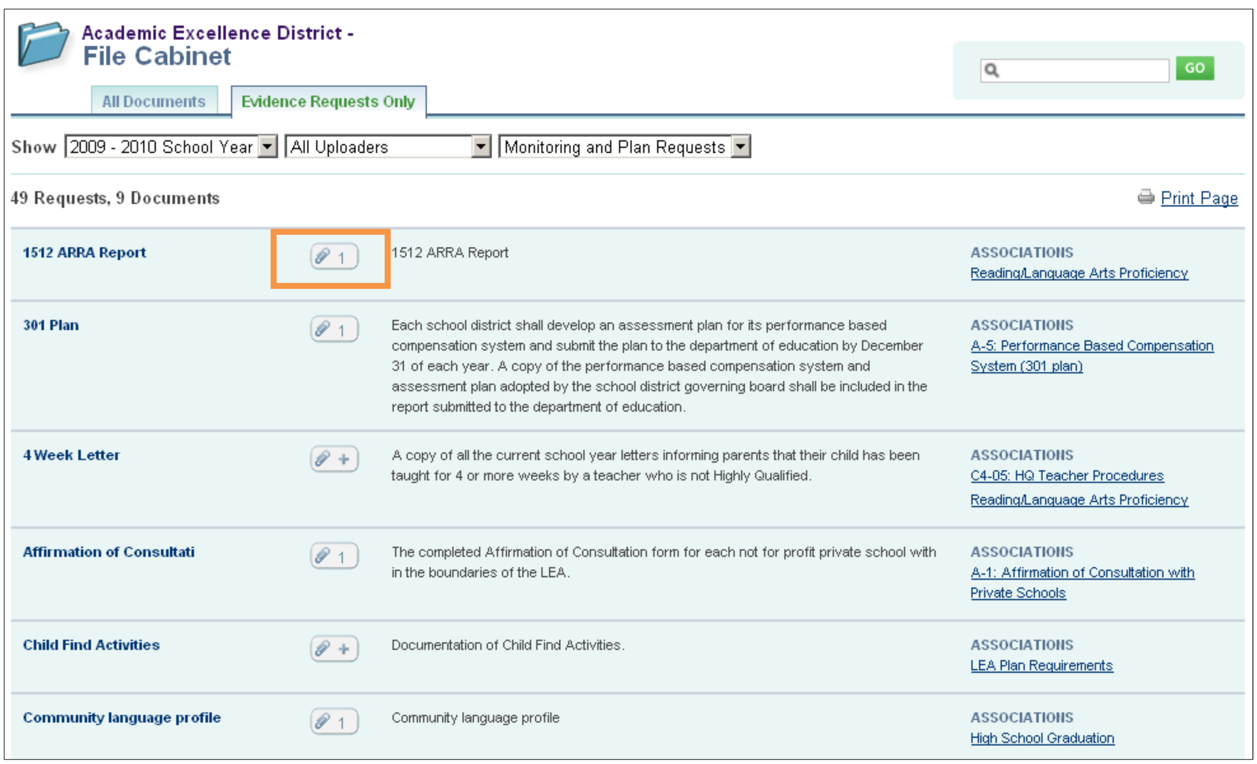
Documents with the Draft icon have been set to Draft mode by the uploader or document editor. State users may not download these documents.

Post Review icon: 

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

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 and state goals.



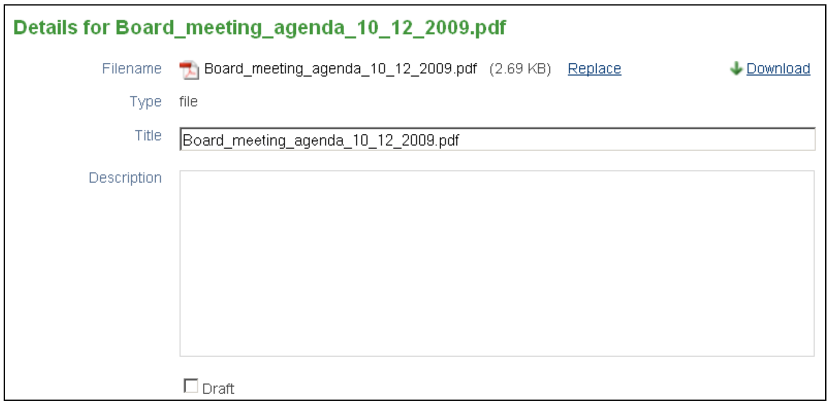
Click the document icon to access documents already uploaded for an evidence request or to upload files into an evidence request from this tab.

The Associations column of this tab shows which monitoring items or plan goals the request is attached to. You may click the link to go to that monitoring item or that plan goal.

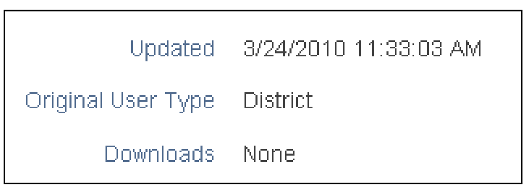
Editing and Deleting Documents

From the File Cabinet view, click the **Title** of a document to view the Edit form. You may update a file if you have a new version by clicking the **Replace** link. Browse and locate the new document for upload. You may also edit a URL provided for a Web Link.

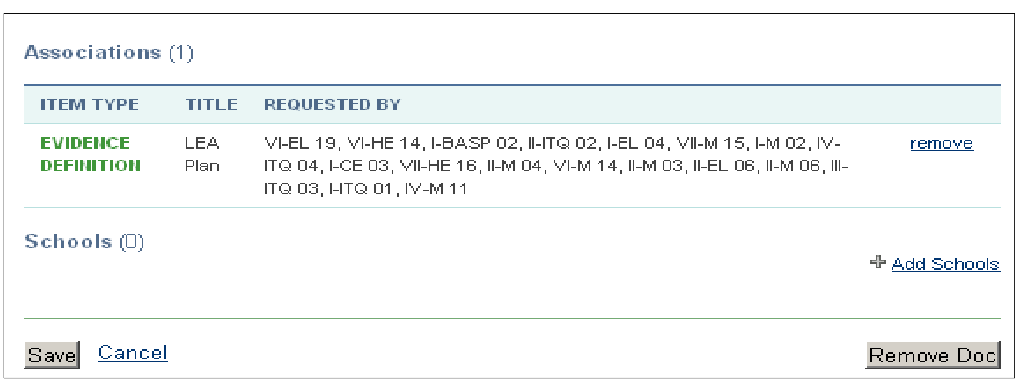
You may change the Title, Description and Draft status on this screen.



Below this section is some information about the document, including last update date/time, the type of user who uploaded the document and the number of times that the document was downloaded by any type of user (school, district or state).



In the Associations section, you may view the document's associations: with Plan Goals, Monitoring Items or Evidence Requests. You may remove a document's association with a Goal or Monitoring Item by clicking the **remove** link next to the element. This removes the document association with that component but not from the file cabinet.



You may also add or remove school associations in the Schools section.

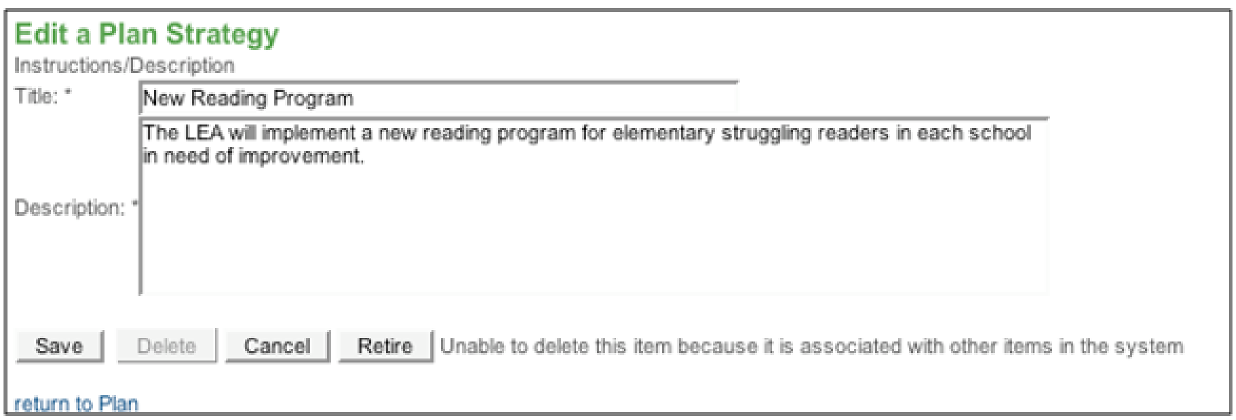
To save any updates, click the **Save** button at the bottom of the screen.

To delete the entire record, click the **Remove Doc** button at the bottom of the screen.

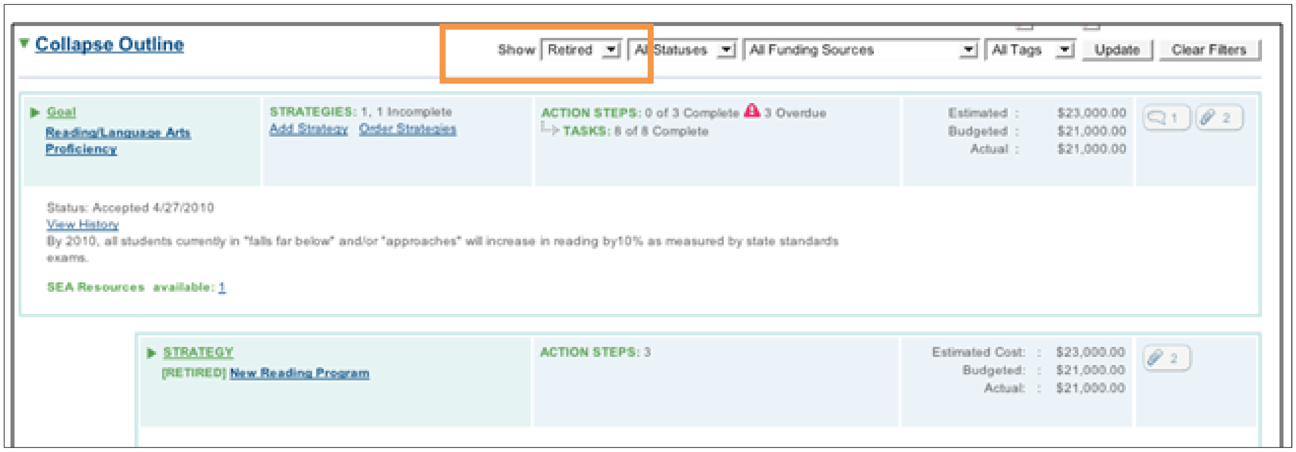
Retiring Plan Elements

Your PMT Plan is a continuous action plan. Some Goals, Strategies and Action Steps may be carried over year to year, some may be completed or no longer valid. Once a plan element is no longer a current reflection of your year's work, you may wish to "Retire" it from view in your ongoing plan. Any element added by the LEA may be retired. (State assigned Goals may only be retired by the SEA.) Retiring any element automatically retires everything below it in the Plan: Retiring a Goal also retires all associated Strategies, Action Steps and Tasks. Retiring an Action Step also retires its Tasks, but leaves the associated Strategy and Goal unchanged. Once an element is Retired, it may be viewed by selecting the Show Retired filter at the top of the plan. Any retired element may also be re-activated and brought back into the current plan, along with all of the retired elements below it.

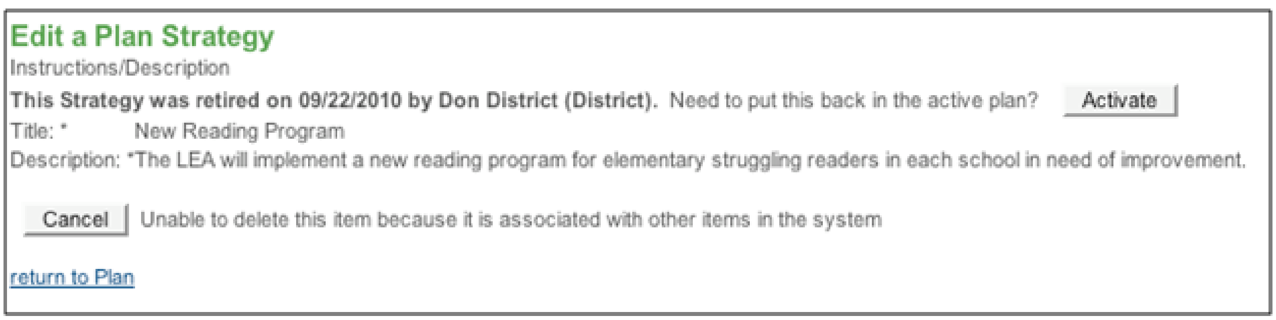
To retire a plan element, click on the title to go to the edit page. You will see the Retire button next to the Save and Cancel buttons.



After you confirm that you want to retire the element, it will be removed from active the plan. To Re-Activate retired elements, select the Show Retired from the filter list at the top of the plan. You will see all retired elements.



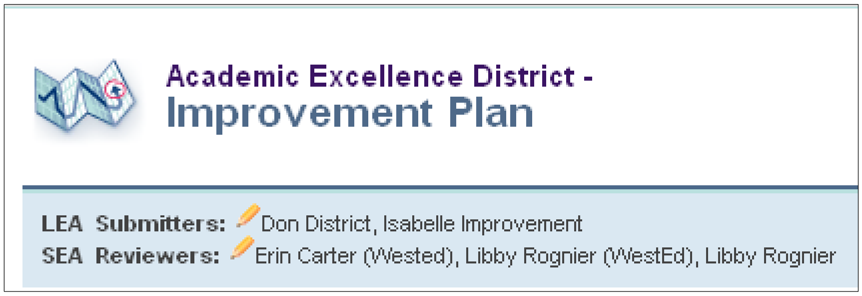
Select the title of the element you wish to re-activate to go to the edit page. You will see a history of who retired the item and the date it was retired. Click on the Activate button to place the element back into your current, active Plan. Any associated elements that were retired with this item will also be activated. You may retire them individually, if you don't want them in your active plan.



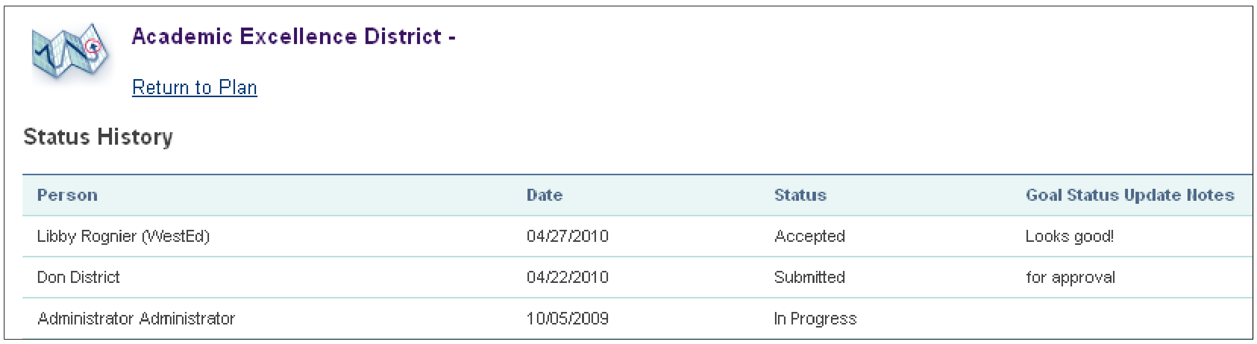
Once you return to your Plan, change the filter back to Active to see that the element has been restored to Active status. The Active view of the plan is the default view, which you will see each time you login to your plan.

Submitting Goals for SEA Review

If your state has required Goals that are submitted for Review by the SEA, you will see the LEA Submitters and SEA Reviewers listed at the top of your Plan Overview. District Administrators may click on the pencil icon next to the LEA Submitters to designate new submitters. (SEA Reviewers are set by the SEA.)



Above each Goal Description is a Status indicator for each Goal. (All Goals are initially marked as "In Progress.") The View History link allows you to see a record of any status changes, including who made the change and the date, as well as any comments about the status change.


Academic Excellence District -

Return to Plan

Status History

Person	Date	Status	Goal Status Update Notes
Libby Rognier (WestEd)	04/27/2010	Accepted	Looks good!
Don District	04/22/2010	Submitted	for approval
Administrator Administrator	10/05/2009	In Progress	

If you are a designated Submitter for your LEA, you will also see a Submit Goal link for all In Progress Goals. Click on this link to change the Status of your Goal to Submitted, and add a comment to the SEA Reviewer. You will also see the Status History on the Submit page.

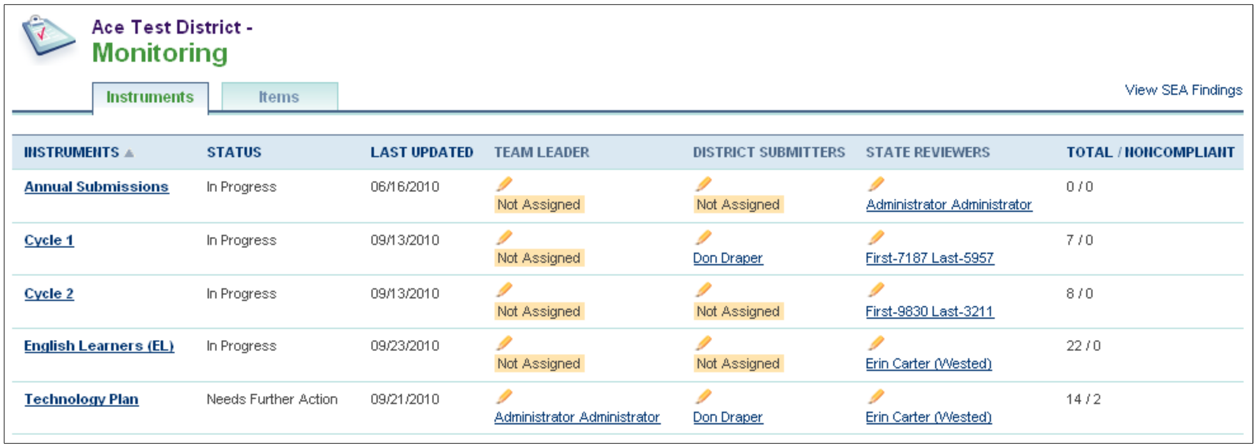
Once your Goal has been Submitted, your SEA Reviewer(s) will receive an email telling them it's ready for Review. After review, you will receive an email once it is either Accepted or marked Needs Further Action, and the new Status will appear on the Plan Overview. If the Goal is Accepted, the Submit Goal link will disappear. If it Needs Further Action, the Submit link will be reactivated.

The Status of each Goal also appears on your LEA Overview page. You may click on the Title of the Goal on the LEA Overview to go directly to that portion of your LEA Plan.

Monitoring Overview

For each monitoring item, you may enter a status and comments for a self-review, and upload the evidence you are providing to the state. The status and comments may be used for internal communication by district staff until the conclusion of the onsite visit, at which point it is available to the state. You may access the monitoring instruments associated with your district from either the LEA Overview or Monitoring tabs at the top of the main navigation.

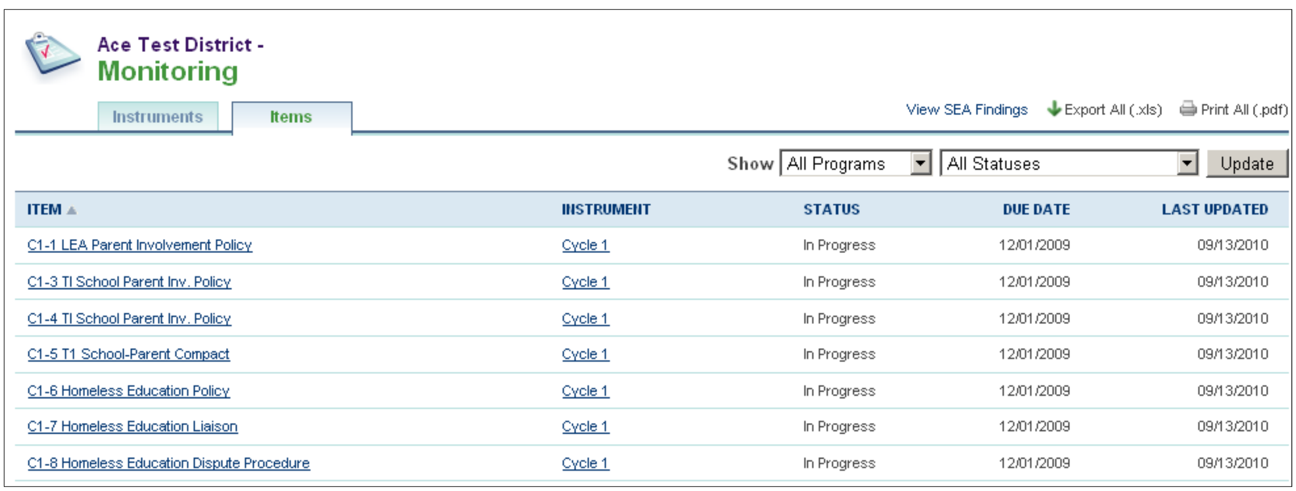
Select the **Monitoring** tab to view a summary of all instruments and items associated with your district. The Instruments tab displays a list of the instruments the district is participating in and their statuses. The last time the instrument was updated on PMT by any district user also appears. The instrument's Team Leader, District Submitters and State Reviewers are listed. If any monitoring roles remain unassigned, they will be highlighted if you have access to edit them. The total number of instrument items and how many items a district user has designated as not meeting requirements appears on the right.



INSTRUMENTS	STATUS	LAST UPDATED	TEAM LEADER	DISTRICT SUBMITTERS	STATE REVIEWERS	TOTAL / NONCOMPLIANT
Annual Submissions	In Progress	06/16/2010	Not Assigned	Not Assigned	Administrator Administrator	0 / 0
Cycle 1	In Progress	09/13/2010	Not Assigned	Don Draper	First-7187 Last-5957	7 / 0
Cycle 2	In Progress	09/13/2010	Not Assigned	Not Assigned	First-9830 Last-3211	8 / 0
English Learners (EL)	In Progress	09/23/2010	Not Assigned	Not Assigned	Erin Carter (Wested)	22 / 0
Technology Plan	Needs Further Action	09/21/2010	Administrator Administrator	Don Draper	Erin Carter (Wested)	14 / 2

To view the Instrument Overview for an instrument, select the Instrument name on this page or on the LEA Overview screen.

The Items tab shows all monitoring items currently assigned to the LEA. You may sort by a particular program or item status, such as filtering to show only non-compliant items. Click the item name to go to the item response page.



ITEM	INSTRUMENT	STATUS	DUE DATE	LAST UPDATED
C1-1 LEA Parent Involvement Policy	Cycle 1	In Progress	12/01/2009	09/13/2010
C1-3 TI School Parent Inv. Policy	Cycle 1	In Progress	12/01/2009	09/13/2010
C1-4 TI School Parent Inv. Policy	Cycle 1	In Progress	12/01/2009	09/13/2010
C1-5 T1 School-Parent Compact	Cycle 1	In Progress	12/01/2009	09/13/2010
C1-6 Homeless Education Policy	Cycle 1	In Progress	12/01/2009	09/13/2010
C1-7 Homeless Education Liaison	Cycle 1	In Progress	12/01/2009	09/13/2010
C1-8 Homeless Education Dispute Procedure	Cycle 1	In Progress	12/01/2009	09/13/2010

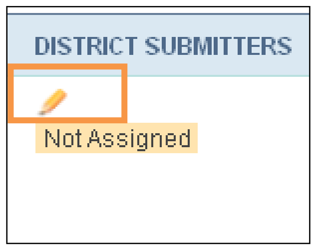
Assigning District Submitters (LEA Admin only)

The Team Leader, State Reviewers and District Submitters are assigned to each instrument for a district.

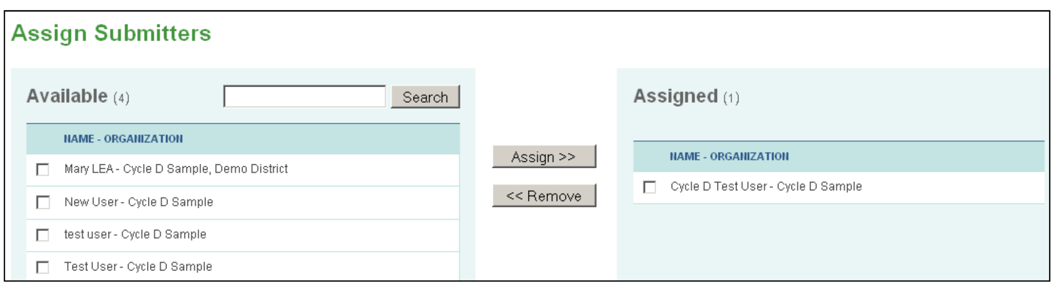
Your Team Leader is the primary contact for onsite-related questions and issues. State Reviewer(s) are assigned to individual instruments, and may review instrument information before or during the onsite visit. State Reviewers determine whether the evidence presented for review meet requirements for the item. Although all state users may view your monitoring information, the state reviewers perform the actual review and enter findings.

All district users are allowed to make changes to the instrument and upload evidence. The District Submitter(s) determine when the instrument evidence is complete, and submits the instrument for state review. They are assigned by a district administrative user.

Your assigned instruments appear on the Monitoring Overview screen, with Team Leaders, State Reviewers and District Submitters designated. If no one has been assigned to a role, "Not Assigned" will appear. Click the edit icon to change the district assignment for that instrument.



A list of all district users will appear on the left side of the screen in the Available section. Select any number of users and click the **Assign** button in the middle to add them as Submitters.



To remove an assignment, uncheck the box next to the user's name in the Assigned section and click the **Remove** button.

Monitoring assignments may also be made on the Instrument Overview screen or on a user's account in User Management.

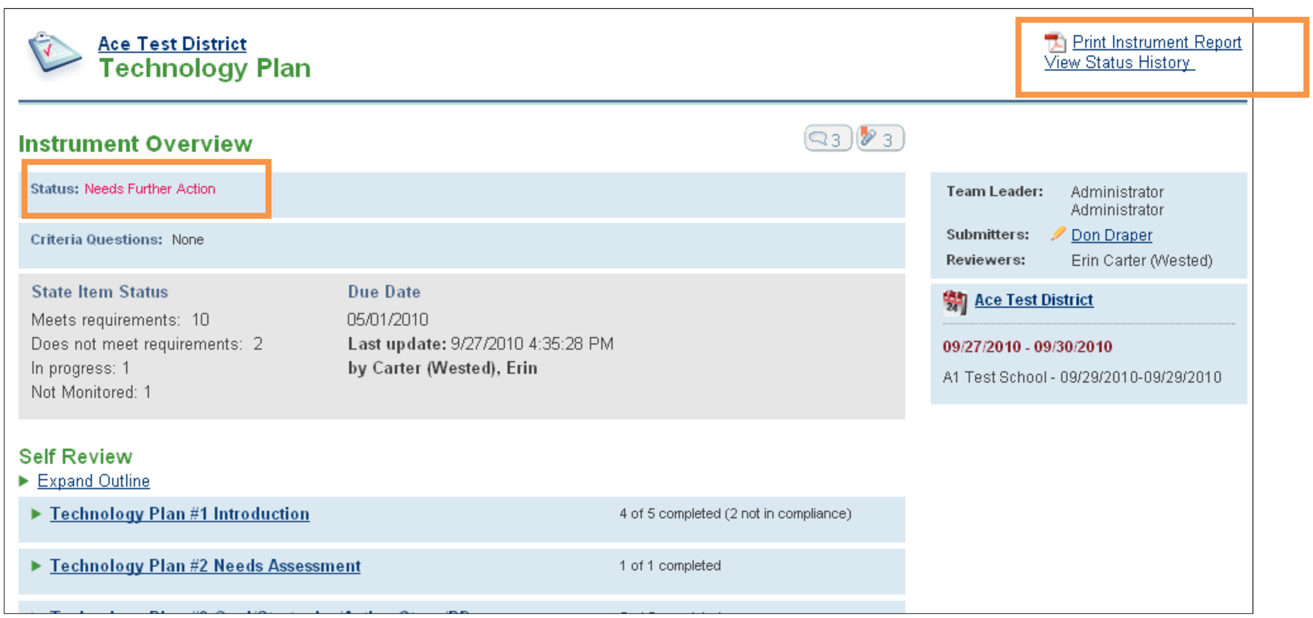
Instrument Overview

The Instrument Lifecycle

The overall status of the instrument may be viewed in three places: the LEA Overview, the Monitoring Overview, and each Monitoring Instrument Overview.

Here is a summary of the Instrument status values and their meaning.

- **In Progress** is the starting state of the instrument for the district. District users may upload evidence, enter item comments, and change item status values as needed. Although State users may see your progress during this working period, they cannot make final determinations, and understand that the district may change any of the evidence or item entries.
- **Submitted** indicates that the district has finished uploading evidence and making item entries.
- **Received** is the status in which the state will do its review work. State users will review evidence, make findings, and determine item status before and during the onsite visit. State user may also contact the district for evidence clarification or additional evidence as needed. District users may continue to upload evidence and change items, but these actions may trigger e-mail notifications to state staff.
- **Needs Further Action** is one outcome of the onsite visit. This status indicates that the instrument contains items that do not meet requirements, and triggers the due date for district response. The district may continue to modify and upload evidence for items with a status of 'Does Not Meet Requirements.' All other items are locked from further changes.
- **Accepted** indicates that the state is finished with all work on the instrument and does not expect any further action from the district.



The Instrument Overview displays the counts of items by status for the district's self review. The due date for the instrument is shown, as well as the last date the instrument was updated by a district user and their name.

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 district's self-review item statuses and comments will appear while the instrument is still In Progress or Received. After a state review of the instrument, the district will also see the state review status of each item and any findings that have been written.

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	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]) 5.1 The LEA monitors compliance with any and all rules and regulations. (EC 260) 5.2 All student clubs have equal access to facilities and a fair opportunity to meet. (5 CCR 4927) 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]) 5.4 The LEA recognizes and eliminates unlawful discrimination. (5 CCR 4900) 5.5 The LEA investigates complaints of unlawful discrimination. (5 CCR 4960[a])
Inventory of Program Documents	
Other Documents	Process for adding new courses Recruitment strategies Selection criteria
Legal References	

You may view the status history of the Instrument by clicking the **View Status History** link below the Instrument Report PDF. This will show all of the instrument status updates, when they were made and by who.

Ace Test District

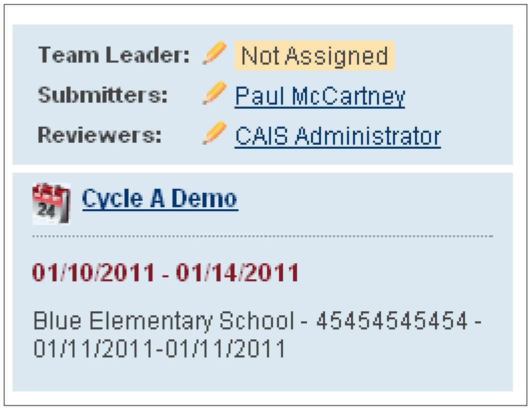
Monitoring

INSTRUMENT: Technology Plan

Status History

UPDATED	BY	STATUS
09/23/2010	Erin Carter (Wested)	Needs Further Action
09/21/2010	Erin Carter (Wested)	Received
09/21/2010	Don Draper	Submitted
09/13/2010	Administrator Administrator	In Progress

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

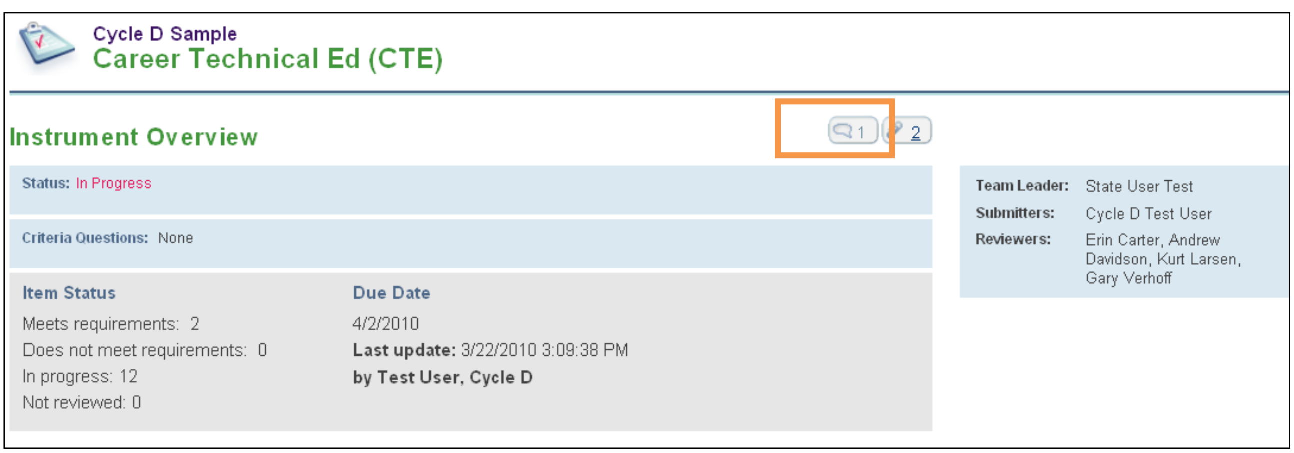


Submitting Your Evidence to the State

When the district is satisfied that the evidence is complete for an instrument, an authorized user may submit the instrument to the state for review. This changes the instrument status to 'Submitted,' and allows the state to begin their review. You may continue working on the instrument in this status. The current deadline for submission will be communicated to you but you may submit an instrument at any time. We recommend that you submit your instruments as they are completed rather than waiting for the due date to submit them all. This will give state staff more time to review the information and provide feedback before an onsite visit.

Responding to Monitoring Items

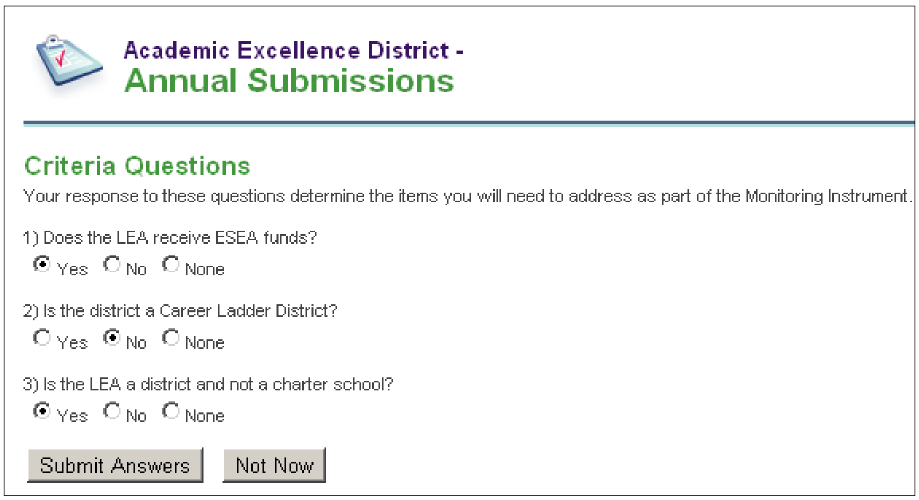
The first step in monitoring navigation is to select an instrument from either the LEA Overview screen or the Monitoring tab. You will navigate to the Instrument Overview screen for the selected instrument. The top of the Instrument Overview screen contains information about the instrument's status, monitoring role assignments and item statuses, as well as last update and due date information. You may add comments on the Instrument Overview screen specific to the instrument as a whole by clicking the comment icon at the top of the screen.



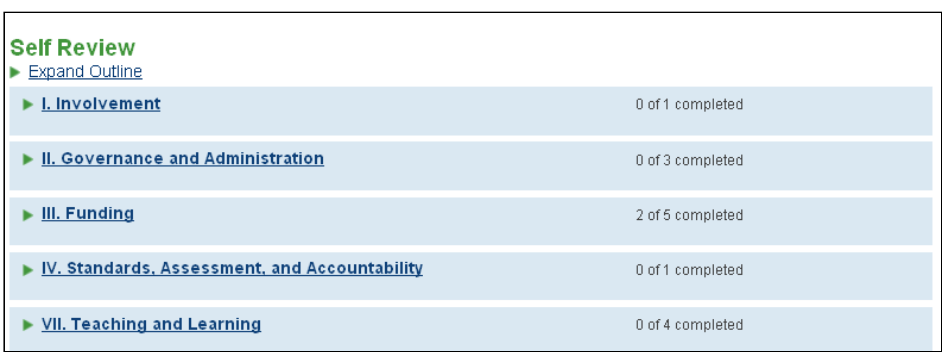
Criteria Questions

Criteria Questions may be asked as the beginning of working on a Monitoring instrument. Criteria Questions are Yes/No questions asked to determine the applicability of certain Monitoring items. If a Monitoring Item has Criteria Questions applied to it and the LEA answers "No" to those questions, the item will be removed and the LEA will not have to respond to that item.

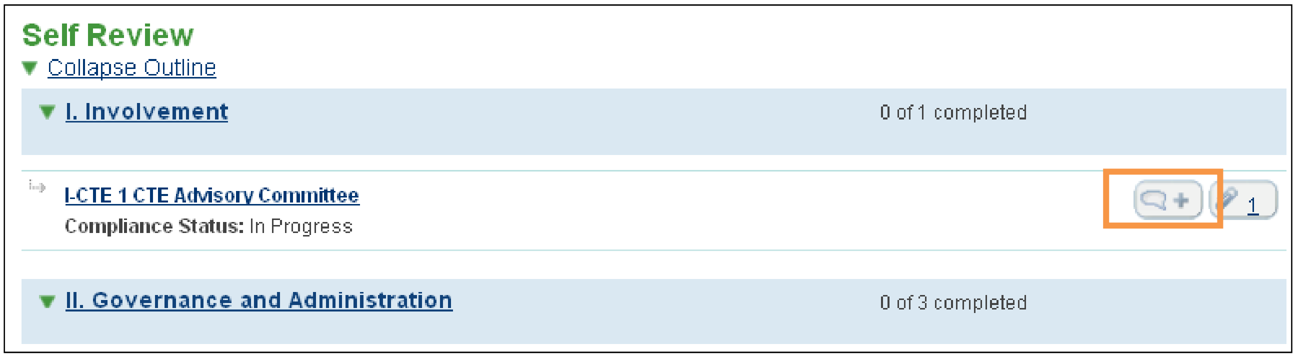
If Criteria Questions have not been answered by the LEA yet, they will be asked as soon as you select the Monitoring Instrument that contains them. Select the answer and click **Submit Answers** to save. You may select **Not Now** to return to the LEA Overview screen to respond to all items in the instrument.



Under Self Review, the items under each Dimension appear with a summary of the total number of completed items in each Dimension. Click the arrow next to the Dimension name to expand the view to see all associated items or click **Expand Outline** to see all items in the instrument.



The status of the item, number of comments for the item and the total number of associated documents in the File Cabinet uploaded for that item are displayed in the outline. If the document icon has a red flag, this means that the item contains required documents.



Click on the Item ID to view the Item Response page for that item.

Item Response Page

The Item Response page provides detailed information about the monitoring item. It provides you with information and guidance to address an item, in context of the response itself. Your response to this information will be reviewed by the state to determine whether the item meets requirements.

Item Response Page Components

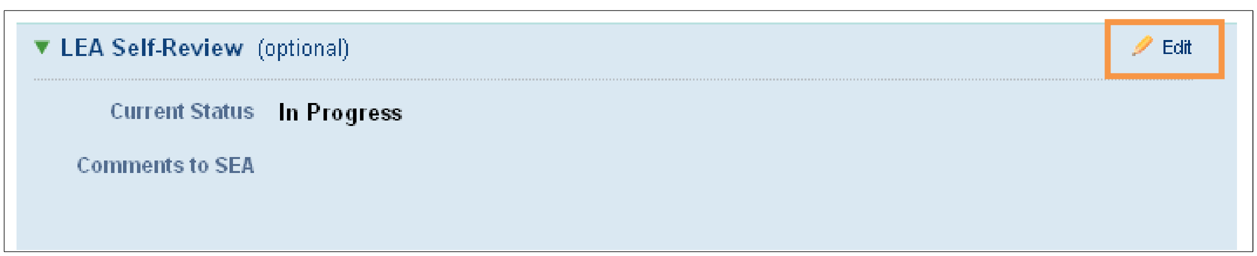
The primary components of the Self Review Item Response page are:

- Self-Review tool
- Monitoring item information
- Legal requirements or references
- State Resources
- Comments
- LEA File Cabinet upload

You may expand or collapse the Compliance Indicators/Program Item section, the Legal Requirements section, the Resources section, or the LEA Self-Review section as needed.

Self-Review

The Self-Review tool allows you to make an informational determination of your own compliance with the item. Start by clicking the **Edit** link in the LEA Self-Review area.

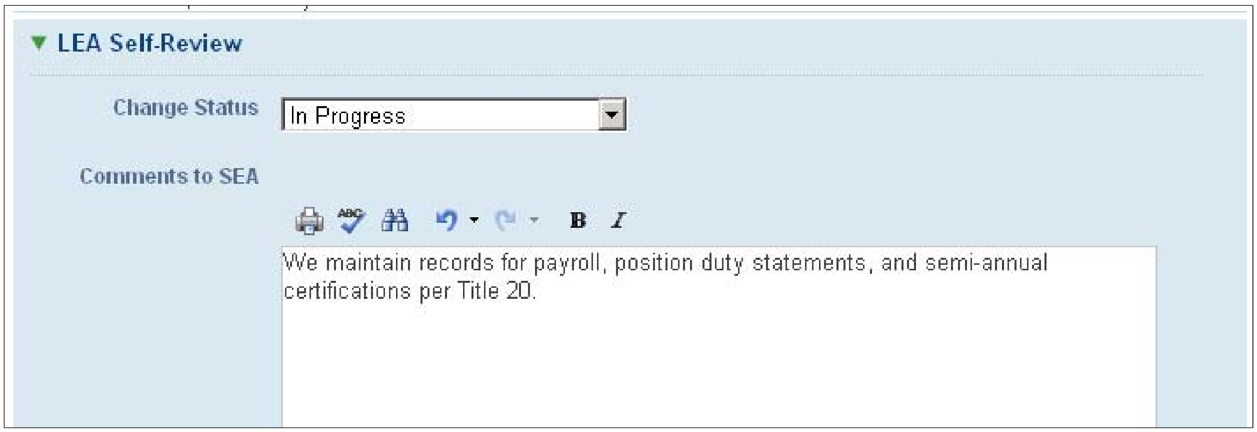


The district user responds to each item by selecting from the following statuses:

- **In Progress**: indicates that the district 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 district believes that the evidence is sufficient to meet requirements for the item.
- **Does Not Meet Requirements**: indicates that the district 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.



Item Information

Below the self review and Comments to SEA field is the item information content. The information displayed for the Monitoring Item includes:

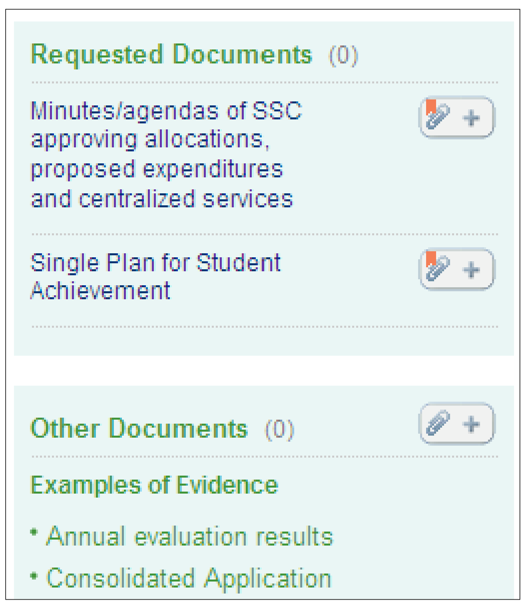
- The **Compliance Indicators** or **Program Item** is the text of the monitoring item.
- **Legal References** are the citations that drive the compliance item. The system allows the SEA to extract specific sections of code to display to users in relation to the particular item. Click on any link to view the content of the legal reference.
- **Resources** are 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. Click the name of the resource to download the file or view the web link.

View Status History

Below the evidence boxes is the View Status History link. Like with the instrument Status History, you can see the history of item statuses both for the LEA's self-review and after the state's review, the state statuses.

Types of Evidence

On the right side of the item response screen is the document upload section. The top section is the **Requested Documents** section. Evidence requests listed here represent specific documentary evidence requests made by the state for this item. In the example below, the "Technology Plan Introduction Title Page" is listed as a required document for this specific item. There may be one or many individual requests listed here, each listed with an Attach Doc button. Note that there may be no specific evidence requests for a particular item.



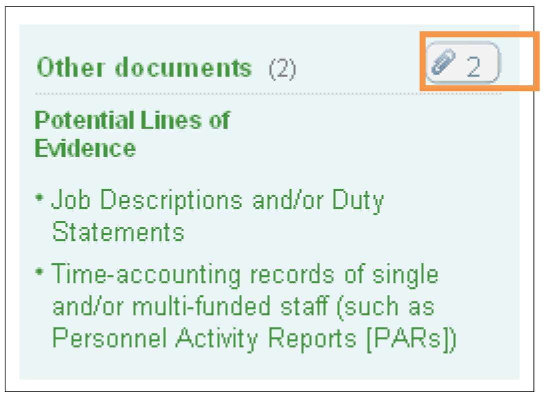
Beneath the specific requests under Required Documents is the **Other Documents** section. Here you may upload any documents suggested in bulleted list below or any other documents that you are supplying as evidence.

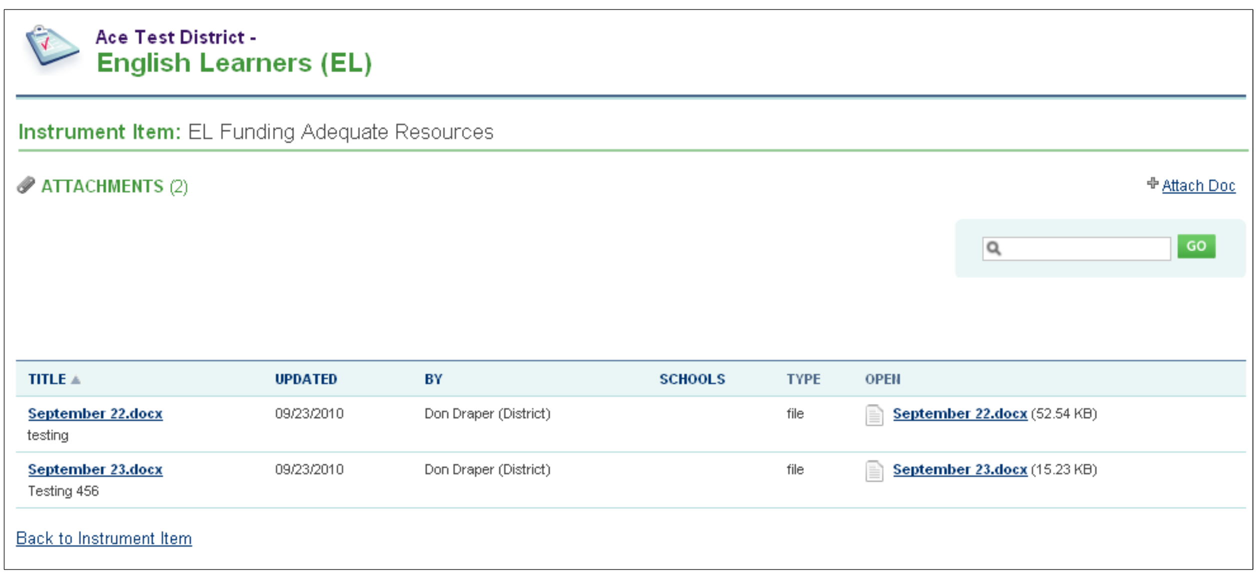
The Attach Document screen will open with the same process as described in the Plan section of this user guide.

Accessing Files

All documents uploaded to PMT by the district will be contained within the File Cabinet but may be accessed in a variety of filtered views.

The most specific view of documents is only documents uploaded for a specific evidence request in the Requested Documents section, a specific Plan element, or the Other Documents category for a particular monitoring item. If a number appears in the Attached Documents button, documents have been uploaded to that area and clicking the button will show only those specific documents.

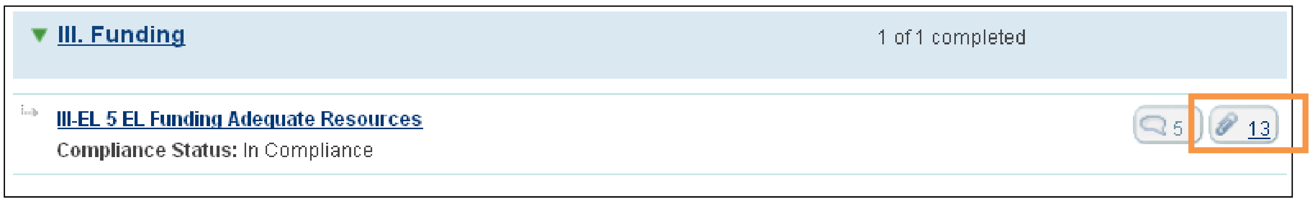




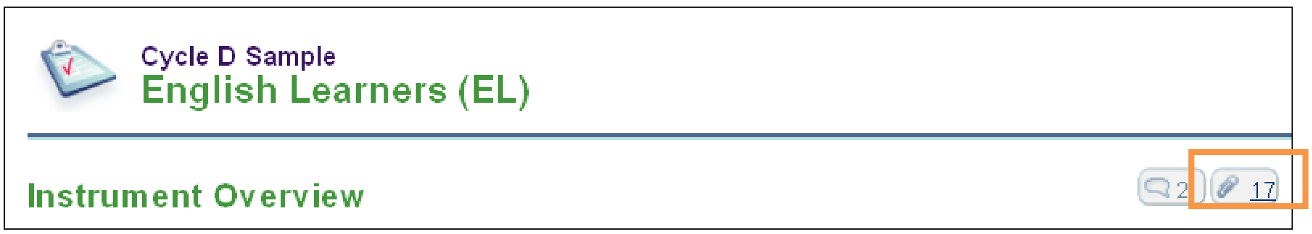
You may add additional documents to the element by clicking the **Attach Doc** link at the top of this view.

You may also view all documents uploaded for all evidence categories for one monitoring item by clicking the document icon at the top of the item response page:

Or by clicking the document icon for the item on the Instrument Overview page:



You may also view all documents uploaded for all monitoring items in the instrument at the top of the Instrument Overview screen.

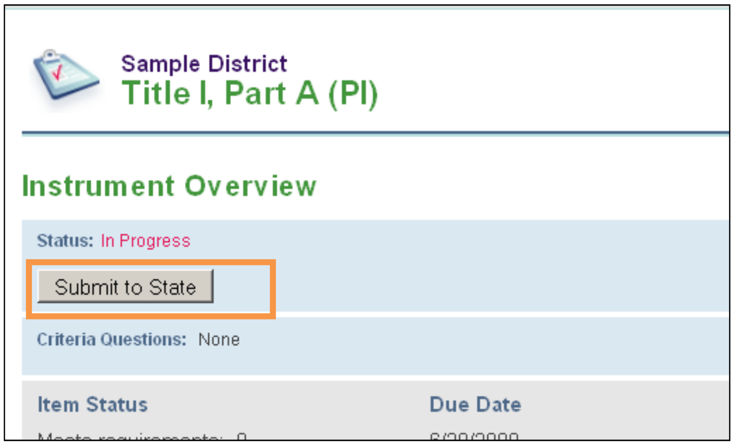


Submitting completed documents

After uploading all evidence for the items in a particular instrument and completing the Self Review, the District Submitter submits the completed instrument to the state. Submitting the instrument indicates to the state that the status of the instrument is now “Submitted” and that associated documents are ready for review. The state 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 district file cabinet should be communicated to the reviewer.

District users who have been selected as District 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.

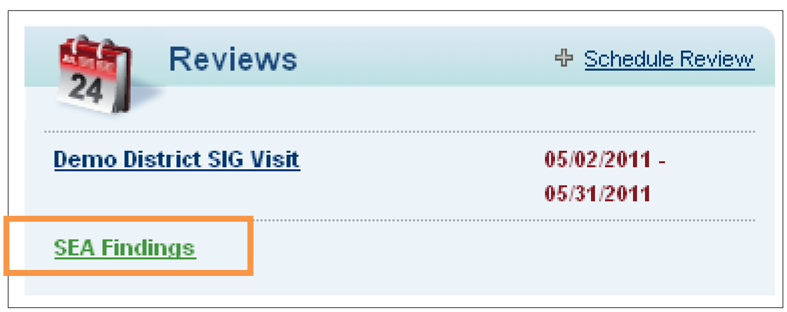


You will be asked to confirm on the next screen. Click **Submit** to complete. Click **Cancel** to cancel the submit process.

Once submitted, the Instrument Overview screen will refresh and the new status will appear at the top as “Submitted.”

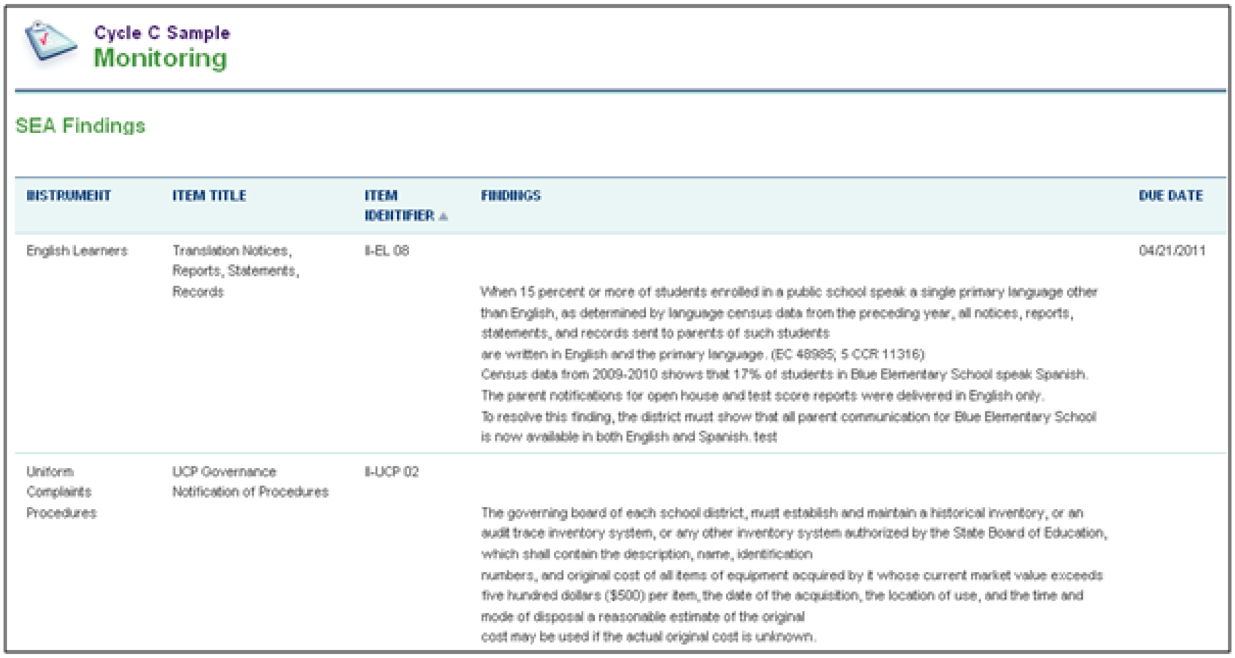
Viewing Findings and Resubmitting Items

After the state has concluded to review, the instrument status will be changed to either Accepted or Needs Further Action. Any items that are non-compliant may be accessed by the LEA and the findings may be viewed in three areas: on the item page, in the Instrument PDF report, or on the SEA Findings screen. The SEA Findings screen may be accessed after a review from either an Onsite (if applicable) on the LEA Overview:

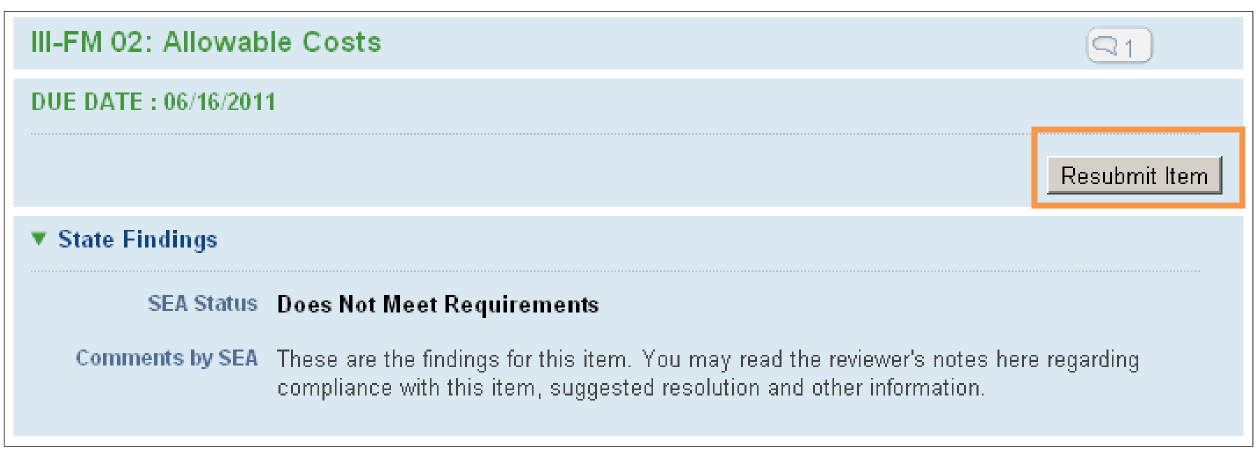


Or from the Monitoring tab:

The SEA Findings screen will display any item that had or has a status of Does Not Meet Requirements in an instrument that has been reviewed. This screen shows all items and findings for the LEA across reviewed instruments.



After an instrument review, the resolution of non-compliant items is tracked on an item-by-item basis in PMT. 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 non-compliant item may be resubmitted to the state by the instrument's District Submitter.



Click the Resubmit Item button to notify the state 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."

After a subsequent review, the state 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.